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IMPROVING PRACTITIONER READINESS FOR STRATEGIC ORGANIZATIONAL ROLES: AN EXPLORATORY STUDY OF STRATEGIC COMPETENCE AND ITS ROLE IN HUMAN RESOURCE DEVELOPMENT PRACTICE

by

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Dissertation

Submitted to the Faculty of

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the Degree of

DOCTOR OF EDUCATION

in

Human Resource Development

May 2002

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IMPROVING PRACTITIONER READINESS FOR STRATEGIC ORGANIZATIONAL ROLES: AN EXPLORATORY STUDY OF STRATEGIC COMPETENCE AND ITS ROLE IN HUMAN RESOURCE DEVELOPMENT PRACTICE

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This study explored the concept of strategic human resource development (SHRD) in the context of practitioner competence, education, and development. Three propositions were investigated. First, current human resource development (HRD) practice, which emphasizes the design and delivery of training, education, and development, is not sufficient to meet the complex needs of today's organizations. SHRD is a more effective approach to influencing organizational change and performance. Second, SHRD requires practitioners to have a broader set of knowledge, skills, capabilities, and roles/characteristics. Yet little attention has been given to the competencies needed to perform strategic HRD roles. The third proposition was that action is needed to advance the concept and practice of SHRD. Improving practitioner readiness for strategic organizational roles was proposed to address the gap between current and emerging HRD practice.

A qualitative research design using naturalistic inquiry was adapted to support the exploration of SHRD practice. Four separate but interrelated works, drawing on the researcher's teaching, learning, and HRD consulting experience, were presented in an attempt to identify major themes in SHRD practice and to develop a strategic competency framework.

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Key findings were: (a) SHRD is being addressed in HRD discourses, however the competencies needed to facilitate SHRD are presently unclear; (b) several dilemmas in general HRD practice, including incongruent theoretical and practice principles, were found that seemingly impede progress toward improved and more sophisticated practice; and (c) the mission, curricula, and courses offered by many HRD graduate and undergraduate programs are not inclusive of the strategic HRD paradigm.

It was concluded that SHRD must be supported with stronger theoretical and practical models, and work is needed to improve the current level of competency required for HRD practice so that it reflects the emerging strategic focus. Moreover, HRD education and development must be renewed to deepen practitioner expertise including strategic knowledge, skills, and capabilities. Included is a strategic HRD competency framework and a course design that demonstrates how the strategic thinking skill was addressed in one undergraduate course. Implications for HRD research, education, professional development, and practice were discussed and recommendations for further action were presented.

Patricia J. Arnold 4/12/02

Patricia Arnold, Major Professor Date

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My parents, Lieutenant Colonel (USAF Retired) Harold and Trudy Batiste, to whom this work is dedicated. They nourished my resolve to complete this journey, and their wisdom and high ideals provided a solid path for me to travel.

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CHAPTER I

INTRODUCTION

Statement of the Problem

> Smart organizations recognize that a learning and performance plan is as much a strategic tool as a marketing or finance plan and that it should get the same kind of tough love from the top: insistence on results and full support if it can deliver. (American Society for Training and Development, 2002c, n.p.)

Human resource development (HRD) practice involves the design and delivery of employee training, education, and development to improve organizational effectiveness. While HRD has historically focused on individual learning and performance, it is shifting toward *strategic* human resource development (SHRD). As Torraco and Swanson (1995) suggested, "Today's business environment requires that HRD not only support the business strategies of organizations, but that it assume a pivotal role in the shaping of business strategy" (p. 11).

In recent years, HRD researchers have argued that an explicit link between HRD and broader organizational goals and strategies is needed (Caster, 2001; Garavan, 1991; Garavan, Costine, & Heraty, 1995; Garavan, Heraty, & Morley, 1998; Gilley & Maycunich, 1998; Heraty & Morley, 2000; Lipiec, 2001; Luoma, 2000; McCracken & Wallace, 2000a, 2000b; McLagan, 1999; Noel & Dennehy, 1991; Torraco & Swanson, 1995; Ulrich, 1997). Heraty and Morley (2000) observed, "The HRD function has experienced considerable change in recent years. While often viewed as an elusive activity, lacking

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any real strategic focus, there is evidence that this is changing" (p. 31). In fact, "HRD is seen as a way of forging a relationship between human resources and strategy" (Garavan et al., 1995, p. 4).

SHRD emerged in the 1990s when rapid and widespread environmental shifts such as globalization and information technology were on the rise (McCracken & Wallace, 2000b). It was defined as "the creation of a learning culture, within which a range of training, development and learning strategies both respond to corporate strategy and also help to shape and influence it" (McCracken & Wallace, 2000b, p. 288).

While the concept of SHRD is not new, the issue of practitioner competence as it relates to performance in strategic organizational roles has not been examined to date. Ulrich (1997) suggested that practitioners need to perform as strategic partners – facilitating dialogues about broader organizational strategy, and then turning those strategies into practice. The strategic business partner role is relatively new, however little is known about the knowledge, skills, capabilities, and roles needed for SHRD practice. This study sought to explore the concept of SHRD in the context of practitioner competence, education, and development. What does it mean for HRD practitioners to be "strategic partners," and what needs to be done to ensure that practitioners have the knowledge, skills, and capabilities to achieve full integration at the strategic organizational level?

Defining the Problem

Clark's (1999) model for generating problem statements in qualitative research was applied to further define the present research problem. Three propositions were addressed in this study: (a) the principal proposition, (b) the interacting proposition, and (c) the specifying proposition. Clark (1999) described the principal proposition as "a

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generalization," or "ordinary knowledge about practice" (p. 3), and the interacting proposition "notes exceptions to challenges, or casts doubt upon the principal proposition" (p. 3). The specifying proposition suggests that there are possible actions that could be taken to remedy the problem. To further define the problem statement, Clark suggested that a researcher select from among four broader types of exceptions or conflicts. These four types are: (a) a provocative exception, (b) a knowledge-action conflict, (c) a policy-knowledge conflict, or (d) a theoretical conflict (Clark, 1999).

Principal Proposition

Information technology and wider recognition of workforce expertise have influenced the role of HRD over the past decade. However, the emergence of more complex organizational challenges has created new challenges for HRD practitioners, and a different blend of employee knowledge, skills, and capabilities are now needed. In the past, HRD existed to support business objectives (Torraco & Swanson, 1995). Today HRD must "assume a more influential role . . . becoming one of the key determinants of business strategy" (Torraco & Swanson, 1995, p. 12).

The principal proposition of this study is that the traditional HRD model is no longer sufficient to meet the needs of today's organizations. SHRD is an evolving practice that, while it has not reached full maturity, is a more effective approach to influencing organizational change and performance.

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Interacting Proposition

While the strategic focus of HRD has gained strength in recent years, four dilemmas exist that impact practitioner preparation for strategic organizational roles, which comprise the interacting proposition.

First, in order for HRD to perform a strategic organizational function, the practice of HRD must also be strategic (Torraco & Swanson, 1995).

Second, according to Ulrich (1997), human resource (HR) practice must make the shift to strategic roles, which he described as: (a) a shift from operational to strategic roles, (b) a shift from "policing" to "partnering," (c) a shift from "administrative" to "consultative" roles, (d) a shift from being "functionally oriented" to "business oriented," and (e) a shift from being "reactive" to "proactive" (p. 23). The literature suggests that, while other areas of HR (e.g., human resource management) have made the strategic shift, HRD practice has not been as quick to respond to the strategic needs of organizations (e.g., the lack of practice models or clearly defined practitioner competencies).

Third, once in strategic organizational roles, HRD practitioners fulfilling strategic organizational roles must be able to "demonstrate a high degree of business savvy" (Dilworth, 2001, p. 103) if they are to effectively champion organizational transformation. However, Dilworth and Redding (1999) observed: (a) "the lack of business acumen on the part of many HRD professionals," (b) "the tendency of HRD professionals to cling to platform instruction," and (c) "top management's tendency to support only those HRD deliverables that can the precisely measured" (pp. 200-201).

Third, Gilley and Maycunich (1998) observed that HRD is often questioned because of the perception that it does not address real organizational problems compared to

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other organizational disciplines. Moreover, there is a perceived lack of credibility of HR and its subspecialties (Ulrich, 1997). Yeung and Berman (1997), Lipiec (2001), and others have suggested the need for HR to make a difference in terms of bottom-line results, and Caster (2001) has argued for innovation with regard to HR-type functions.

Fourth, in traditional HRD practice, practitioners have operated at individual, group, and departmental organizational levels with varying degrees of education and training. Therefore, the delivery of training and other learning activities has varied in quality and results. Moreover, the lack of consistency in professional standards, as well as the lack of accreditation guidelines or practices in the academy, has called into question the legitimacy and credibility of HRD practice.

Given these four dilemmas, the interacting proposition is that the SHRD environment calls on HRD practitioners to work at the strategic, or "macro," organizational level, which requires a broader set of knowledge, skills, capabilities, and roles/characteristics. The traditional and still dominant HRD paradigm fails to adequately address the necessary competencies for strategic HRD roles. The discontinuity between traditional HRD and SHRD roles, perceptions of the traditional practice paradigm, and the lack of consistent standards and guidelines for HRD education are causes for concern.

Specifying Proposition

Much of the SHRD research to date has been largely conceptual. What is collectively known about developing practitioners for strategic organizational roles is limited. Additionally, Linkow (1999) noted, "Little is known about how to develop strategic thinking capacity or strategic competence" (p. 2). The specifying proposition is that action is needed to advance the concept and practice of SHRD beginning with the

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preparation and development of current and future HRD practitioners. Developing practitioner knowledge, skills, and capabilities will "ensure capacity for [organizational] change" (Ulrich, 1997, p. 25).

Knowledge-action Conflict

According to Clark (1999), the knowledge-action conflict serves to further refine the problem statement. The knowledge-action conflict in this study is that a gap exists between how HRD is practiced and what is needed for effective SHRD practice, which is an enhanced and more integrative practice paradigm. The literature lacks the necessary frameworks or descriptions for practitioner competence and effectiveness in SHRD practice. It is, therefore, hypothesized that SHRD calls for strategically competent practitioners. However the HRD field seems firmly lodged in the training–education–development paradigm and lacks the necessary frameworks to advance the field in a strategic direction. It is further hypothesized that by developing strategic competence, practitioners will be positioned to more effectively fulfill strategic organizational roles.

Purpose of the Study

> It is vital that HRD practitioners continuously think and act in ways that create value and deliver results. (Ulrich, 1997, p. viii)

This study addresses a gap in the existing HRD literature by exploring SHRD practice, the roles and competencies necessary for effective SHRD practice, and the opportunities and challenges facing the practice. It is intended to provide HRD researchers, educators, and practitioners with a conceptual strategic competency framework and methods that can be applied for the advancement of SHRD practice.

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Research Questions

The following questions guided the research:

1. How has HRD practice evolved, particularly in more recent years with the shift from traditional practice (e.g., employee training, education, and development) to SHRD?

2. What dilemmas exist that might affect the advancement of SHRD?

3. What competencies (knowledge, skills, and capabilities) contribute to effective SHRD practice, and to what extent are those competencies currently being developed in undergraduate and graduate HRD education?

4. What teaching and learning strategies might aid students' development of strategic competence?

Methodological Overview

The principles of naturalistic or constructivist inquiry (Erlandson, Harris, Skipper, & Allen, 1993) were applied to this study due to the "multiple realities rather than a single reality, each relative to the constructor's experience" (p. xi) being investigated. The study required a continuous process of data collection, analysis, and integration.

My knowledge and experience were used extensively throughout the study. It is for this reason that the study does not meet the full requirement for a naturalistic study, which calls for prolonged engagement in a research setting, among other criteria. The following principles, found in Erlandson et al. (1993), were applied: (a) having a working hypothesis (p. 53); (b) creating an emergent design, which calls on a researcher to build the study as his or her understanding of the context emerges (p. 73); (c) using purposive sampling, "from which one can learn a great deal about the issues of central importance

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to the purpose of the research" (p. 81); and (d) interacting with the data, which calls on a researcher to collect and analyze data simultaneously (p. 114).

Organization of the Study

The study design was largely influenced by the thinking of Schon (1983), Boyer (1991), and Krathwohl (1994), who challenged developing practitioners, researchers, and scholars to: (a) reflect on practice (Schon, 1983); (b) build scholarship through discovery, application, teaching, and integration (Boyer, 1991); and (c) create work that is both meaningful and practical for future application (Krathwohl, 1994).

Edwards (1997) postulated, "The notion of 'reflection' and the 'reflective practitioner' has become central to the processes of professional development in many areas of activity in recent years" (p. 149). Schon (1983) has been widely credited for his writing on reflective practice, used throughout this study. Reflection involves opening up oneself to inquiry, which Schon (1983), Boud, Keough, and Walker (1985), and Bolton (2001) have suggested is an essential element of professional competence.

Schon (1983) believed that "competent practitioners know more than they say" and that "it is possible to construct and test models of knowing" through reflection (p. viii). Boud et al. (1985) thought that "experience alone is not the key to learning," suggesting that reflection is "an active process of exploration and discovery which often leads to very unexpected outcomes" (p. 7). In Bolton (2001), Anne Hudson Jones used the term *narrative competence* to describe "the mastery of several kinds of narrative skills" (p. ix). She suggested, "Narrative competence has been seen as desirable for professionals" (Jones, quoted in Bolton, 2001, p. ix).

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The inclusion of reflective writing in this study provides a reservoir of learning and insights and enriches the scholar-practitioner perspective. This approach informs my thinking and action, as researcher, about SHRD practice and strategic competence.

Boyer (1991) proposed that developing scholars acknowledge four "units of practice": (a) the scholarship of discovery, (b) the scholarship of application, (c) the scholarship of teaching, and (d) the scholarship of integration. This framework allows scholars to "reflect on the meaning and direction of their professional lives" (Boyer, 1991, pp. 10-11). This study used all four areas, referred to as "learning domains," both as a framework and as an opportunity to demonstrate its utility as a possible approach for professional development practice. The application of this approach is depicted in Figure 1.

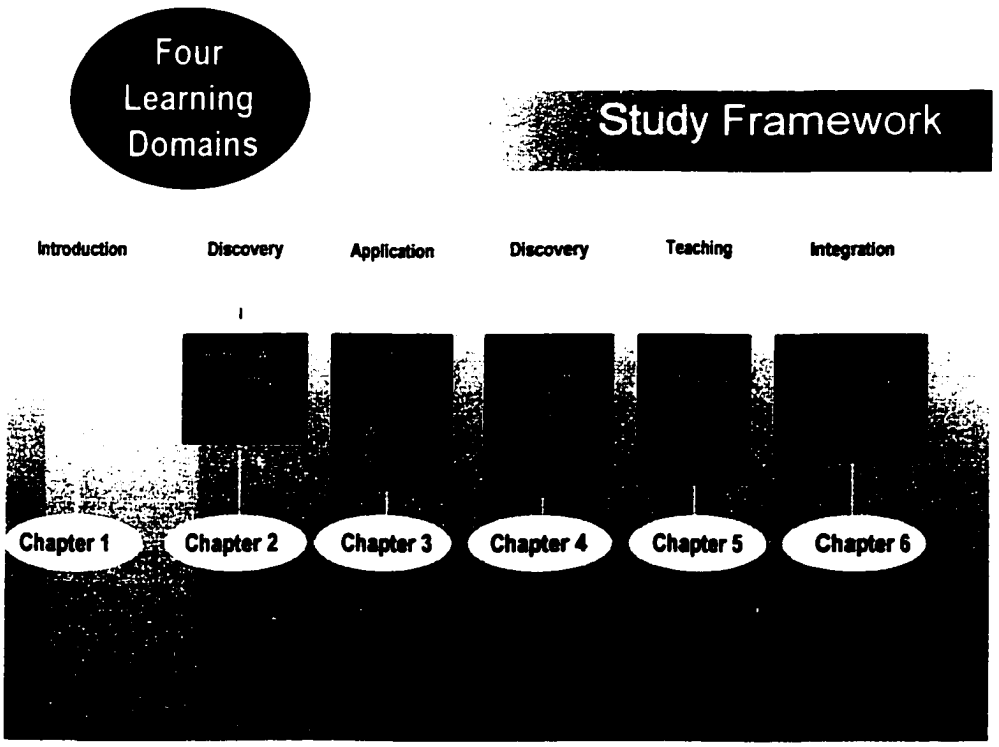

Figure 1. Study framework.

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Krathwohl (1994) suggested that a dissertation should be written in a series of journal-quality articles so that a doctoral student completes his or her studies with a portfolio of publishable work. This study applied Krathwohl's alternative approach to fit both the emergent nature of the study and my predilection – as researcher – to operate from multiple scholarly and practice fields and perspectives.

Chapters II, III, IV, and V comprise four independent but interrelated works. Therefore, study procedures, summaries, recommendations, and areas for further research are presented in each chapter. Chapter II examines and synthesizes conceptual themes in the recent HRD literature in an effort to describe how the field has evolved from a traditional training, education, and development model to a strategic model of HRD. The evolution of HRD and current dilemmas in the field are described and implications for the advancement of SHRD practice are discussed. The chapter serves as a starting point for further exploration of SHRD practice and strategic competence.

Chapter III explores what it means to think and perform strategically as an HRD practitioner. The first section draws on my background and practitioner experience, providing insights into the thinking that underpins the arguments for strategic competence in HRD practice. The second section explores the concept of strategic competence and presents preliminary findings in an effort to determine the knowledge, skills, capabilities, and characteristics needed for SHRD practice. This groundwork will be useful to HRD educators and professional development program leaders.

Chapter IV presents the findings of a study conducted to assess the state of current undergraduate and graduate HRD programs offered at higher education institutions in the United States. Of particular interest is the extent to which these programs are oriented

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toward SHRD and have established curricula that serve to build strategic competence among current and future practitioners.

Chapter V describes an effort to revise an undergraduate organization theory course to emphasize strategic thinking skills and practice. The course emphasized the integration of strategic thinking skills to enable students to perform in strategic organizational roles.

The study is summarized in Chapter VI, integrating major themes, reflections, and recommendations for further study.

Key Terms

Commonly used terms in HRD practice can have multiple and sometimes conflicting meanings, depending on a reader's orientation. This section provides an explanation of terms and underlying assumptions applied in this study.

The Human Resources Context

Historically, the human resources field has been described as the administration of policies and procedures associated with employee welfare in organizations. In the last 30 years, the HR function has shifted from a purely administrative, expert role to an increasingly strategic function (Mabey, Salaman, & Storey, 1998). Although the structure of the HR function varies across industries and organizations, a commonly used typology has been identified to orient readers to its areas of practice. Nadler and Nadler (1989, p. 227) described HR and its practice specialties associated with the HR function as:

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1. Human resource management (HRM) – (also referred to as personnel) – (a) recruitment, (b) selection, (c) placement, (d) compensation, (e) appraisal, (f) information systems, and (g) benefits.

2. Human resource development – (a) training, (b) education, and (c) development.

3. Human resource environment (HRE) – (a) organization development (OD), (b) employee assistance programs, and (c) quality of work life.

4. Human resource/Other – (a) HR planning, (b) industrial-labor relations, (c) research, and (d) career development.

Expanded definitions of the HR portfolio are provided in the following section, as these practices are central to this study.

Human Resource Development

Human resource development has been defined by Nadler and Nadler (1989) as "organized learning experiences provided by employers within a specified period of time to bring about the possibility of performance improvement and personal growth" (p. 4). The practice involves three dimensions of learning: (a) training, learning focused on immediate application in a work setting; (b) education, learning that addresses an unspecified use which can be applied sometime in the future; and (c) development, learning that may or may not be used immediately but is focused on expanding the learner's knowledge and/or skills in a specified area. For example, a new line manager in a manufacturing setting would benefit from supervisory training to improve his or her skills in appraising job performance. An accountant seeking a managerial role would benefit from pursuing a master's of business administration degree. This educational experience

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would potentially position him or her for future career advancement. Finally, an administrative assistant would benefit from a time management workshop in his or her current job role and in future job roles. This would be viewed as a developmental learning experience.

Strategic Human Resource Development

Garavan (1991) defined SHRD as:

> the strategic management of training, development and of management/professsional education interventions, so as to achieve the objectives of the organization while at the same time ensuring the full utilization of the knowledge in detail and skills of individual employees. It is concerned with the management of employee learning for the long term keeping in mind the explicit corporate and business strategies. (p. 17)

Organization Development

Organization development (OD) was defined by Burke (1992) as "a planned process of change in an organization's culture through the utilization of behavioral science technologies, research and theory" (p. 12). OD efforts are intended to expand an organization's capacity to plan for and respond to change. The work of an OD practitioner, either as in internal performance consultant or as an external consultant, is performed through what is referred to as an "intervention." An intervention is designed and implemented after the developmental needs of a specified group are diagnosed following an appropriate assessment process. Depending on the identified needs, a practitioner may facilitate a team-building activity, coach a group of executives involved in strategic planning, or conduct an assessment of an organization's culture and work climate.

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Practitioner

The term practitioner refers to a person who performs job roles related to HRD.

Competence

Spencer and Spencer (1993) defined competence as "an underlying characteristic of an individual that is causally related to criterion-referenced effective and/or superior performance in a job or situation" (p. 9). By "underlying characteristic" the authors meant "the competency is a fairly deep and enduring part of a person's personality and can predict behavior in a wide variety of situations and job tasks"; by "causally related" they meant, "a competency causes or predicts behavior and performance"; and by "criterion-referenced" they meant, "the competency actually predicts who does something well or poorly, as measured on a specific criterion or standard" (Spencer & Spencer, 1993, p. 9).

Strategic Competence

The term strategic competence, as it relates to SHRD, means the broad set of knowledge, skills, capabilities, and roles/characteristics that a practitioner applies in a strategic organizational function.

Strategic Thinking

Lasher (1999) defined strategic thinking as "a systematic approach to analyzing your business' position in its environment, and coming up with ways to make the best of the resources you have, while minimizing your exposure in areas where you are not strong" (p. 4).

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Curricula/Curriculum

The term curricula, or curriculum, refers to a plan for instruction.

Knowledge

"Factual and conceptual material that can be learned" (Nadler & Nadler, 1989, p. 104).

Skills

"Physical and manipulative skills that can be learned" (Nadler & Nadler, 1989, p. 104).

Capability/Capabilities

"A quality capable of development" (Merriam-Webster, 2002, n.p.); an innate characteristic that is gained from experience.

Roles

An identifiable behavior.

Thematic Analysis

"Thematic analysis refers to the process of recovering structures and meanings that are embodied and dramatized in human experience represented in text" (Phenomenolgy, 2002, n.p.).

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CHAPTER II

THE SCHOLARSHIP OF DISCOVERY: A REVIEW OF THE HUMAN RESOURCE DEVELOPMENT LITERATURE

> The focus of our profession on developing people, in the light of the knowledge economy, is the key to competitive advantage. There is a new world of learning emerging – one that links people, learning, and performance - and a new community growing around it. (ASTD, 2002, n.p.)

Strategic human resource development has emerged as an area of focus in human resource development practice in the last 10 years. How has the practice of HRD evolved, particularly in more recent years with the shift from traditional practice (e.g., employee training and development)? What are the dilemmas in current practice that might affect the advancement of SHRD?

The purpose of this chapter is to examine and synthesize conceptual themes in the recent HRD literature in an effort to describe how the field has evolved from a traditional training, education, and development model to a strategic model of HRD. The evolution and current dilemmas in the field are described, and implications for the advancement of SHRD practice are discussed.

The Evolution of HRD

> HRD is a complicated field, dealing with the most intricate and unpredictable of topics – people together with organizations. (Evarts, 1998, p. 33)

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Definition of HRD

Defining the complexities of HRD research, theory, and practice has been a challenging issue since the practice emerged in the mid 1900s (Garavan, Heraty, & Barnicle, 1999; Kahnweiler & Otte, 1997). Nadler and Nadler (1989), widely considered to be pioneers in the field, defined HRD in the 1960s as "organized learning experiences provided by employers within a specified period of time to bring about the possibility of performance improvement and/or personal growth" (p. 4). Twenty years later, Gilley and Eggland (1989) described HRD practice as:

> (1) Individual development focused on performance improvement related to a current job; (2) provides career development focused on performance improvement related to future job assignments; and (3) provides organization development that results in both optimal utilization of human potential and improved human performance, which together improves the efficiency of the organization. (pp. 12-13)

The components of HRD in relation to the broader human resources context are identified in Figure 2.

The HRD Model

According to Nadler and Nadler (1989), three activities are central to HRD practice, as shown in Figure 3: training, education, and development. Training, as defined by Nadler and Nadler (1989) is "learning focused on the present job of the learner" (p. 4); education is "learning focused on a future job for the learner" (p. 4); and development is learning that is not job focused.

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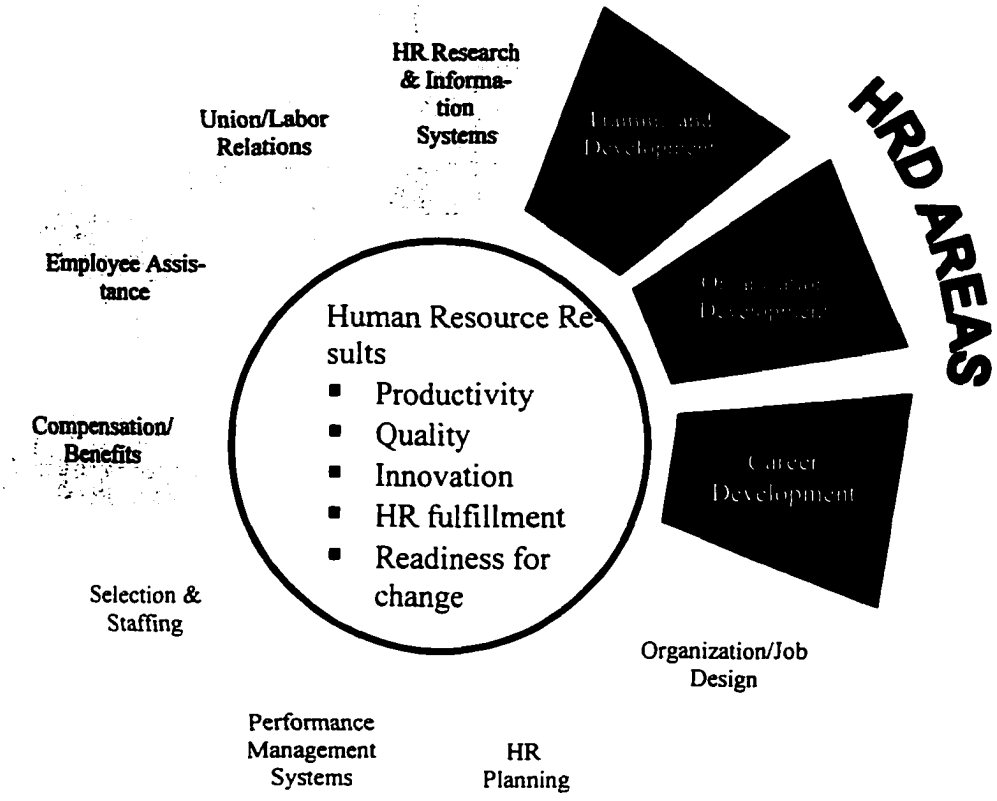

Figure 2. HR components.

Note. Adapted from *The HR Wheel*, 2002a, by American Society for Training and Development, [Online], n.p.

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HRD is:

> ***"Organized learning experiences provided by employers within a specified period of time to bring about the possibility of performance improvement and personal growth" (Nadler & Nadler, 1989, p. 4).***

HRD encompasses three activity areas:

Training	Education	Development
Learning focused on the present job of the learner	Learning focused on a future job for the learner	Not job focused

HRD is designed, delivered and managed within the following roles:

Learning Specialist	Manager of HRD	Consultant
▪ Facilitator of learning ▪ Designer of learning programs ▪ Developer of instructional strategies	▪ Supervisor of HRD programs ▪ Developer of HRD personnel ▪ Arranger of facilities and finance ▪ Maintainer of relations	▪ Expert ▪ Advocate ▪ Stimulator ▪ Change agent

Figure 3. The HRD model.

Note. Adapted from *Developing Human Resources*, 1989, by Nadler & Nadler, p. 4, San Francisco: Jossey-Bass.

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The Evolution of HRD Practice

Early 1900s

Nadler and Nadler (1989) provided the most comprehensive overview of how HRD practice has evolved (see Table 1). They cited the origins of HRD with the emergence of adult education in the early 1920s during the industrial development era. The Industrial Age prompted the need for skilled employees, many of whom were immigrants, and employers relied largely on external sources for human resource development (e.g., high schools and the Young Men's Christian Association, or YMCA). By 1906, programs to develop professional employees for future jobs were emerging.

Table 1

The Evolution of HRD Practice

Decade	Major theme
Early 1900s	Emergence of education for work (Nadler & Nadler, 1989).
1950s	Emergence of professional training societies and organization development (Nadler & Nadler, 1989).
1960s	Postwar realities, emerging technology and changing workforce demographics placed HRD at the center of skills development (Nadler & Nadler, 1989).
1970s	Nadler authors first book on HRD – *Developing Human Resources* – in 1970. The "Japanese phenomenon" spurs the Quality Movement. ASTD membership increases to over 20,000 (Nadler & Nadler, 1989, p. 36).
1980s	HRD responds to the emergence of information technology (Nadler & Nadler, 1989).
1990s	Performance improvement focus of HRD and Strategic Human Resource Development (SHRD) emerges.
2000	Frameworks for SHRD emerge.

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Nadler and Nadler (1989) cited National Cash Register (NCR) as the earliest company to organize education and development courses for their employees. The federal government also played a role in the emergence of employee training, education, and development when it established the National Bureau of Standards Graduate School. By 1918, the National Association of Corporate Training was founded, IBM began training its employees, and New York University and the Carnegie Institute of Technology entered the HRD market.

1950s

During World War II, training was an essential activity, "due to the sudden and immediate need to change large numbers of our nonworking population into workers. Similarly, large numbers of civilians had to be trained as military personnel" (Nadler & Nadler, 1989, p. 28). Professional training organizations, such as the American Society of Training Directors, known today as the American Society for Training and Development (ASTD), began to emerge. By the mid-1950s, the rediscovery that people were, in fact, an essential part of the work environment took hold in the form of The Human Relations Movement. Much of the research during this time was focused on the nature of people and work, "which contributed to the emergence of the organization development field" (Nadler & Nadler, 1989, p. 29).

1960s

Nadler and Nadler (1989) referred to the 1960s and 1970s as "the hectic years" due to the "vast changes in various aspects of society in the United States" (p. 31) including the changing workforce. An example is the Civil Rights Act of 1964, which

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increased the number of minorities entering the workforce. Training and development activities in military settings gained strength as did government employee training. It was during this time that criticisms of HRD practice emerged with the concern that training activities were largely management focused and not geared for line employees.

1970s

Nadler authored the first textbook and model on HRD in 1970, during an era he has referred to as one of "fad and innovation" (Nadler & Nadler, 1989, p. 33). A proliferation of skill and technical training designs was generated during this period. Another shift in HRD practice occurred as a result of the "Japanese phenomenon" (Nadler & Nadler, 1989, p. 35). Nadler (1984) wrote that Japan learned from us, but we forgot to remember: "The race was on to identify what Japanese management was doing successfully" (p. 35). Membership in ASTD increased to over 20,000 members (Nadler & Nadler, 1989, p. 36), and the Quality Movement was born.

1980s

In the 1980s, HRD faced yet another significant environmental shift due to increasing technology. "A new word entered the lexicon – retraining" (Nadler & Nadler, 1989, p. 37). The microcomputer rapidly revolutionized individual work and organizational performance. The decade was "devoted to searching for excellence" (Nadler & Nadler, 1989, p. 37). Motorola, considered the first to establish what is known today as a corporate university, opened a continuing education center.

In the late 1980s, London (1988) and others expressed the need for the human resource system to be able to identify and act on environmental trends, to be able to create

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responses, and to be change agents. Fombrun, Tichy, and Devanna (1984) devoted an entire textbook to the alignment of organizational structures and human resources with strategic objectives. J. Walker (1986) voiced concern that HR professionals did not have the business knowledge to address business issues and concerns. He referred to the need for strategic direction and the need to work with top management to define what is needed for strategic human resource management. J. Walker was skeptical about the prospect of academics/researchers to figure out how to help practitioners make the shift to a strategic role. Later, J. Walker and Moorhead's (1987) survey of CEOs added to the debate by concluding that HR needs to become strategic.

1990s: The Microsoft Example

> Microsoft, currently one of the leading U.S. high-tech firms, seeks "strategic partners" who can play "a critical role in [the company's] success by designing, implementing and managing information products and services that address employee needs worldwide." (*Microsoft Jobs*, 2002, n.p.)

A review of several Microsoft HR-related positions revealed the frequent use of the words "strategic," "partner," "strategic thinking," and "leadership" among desired characteristics. What does this say to those who train, consult, teach, or otherwise compete in the world of HRD and OD? It at least underscores the frequently made observation that traditional HRD and OD roles are no longer the norm and that a different combination of knowledge, skills, and attributes are needed to catalyze business performance today.

In the 1990s, the HRD literature was heavily steeped in the performance improvement approach. Swanson (1995) discussed HRD "as performance improvement and a major business process . . . that connects HRD to other major business processes

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that are influenced by the total organization and the environment in which it functions" (p. 1).

SHRD appears throughout the HRD literature (Caster, 2001; Garavan, 1991; Garavan et al., 1995; Garavan et al., 1998; Gilley & Maycunich, 1998; Heraty & Morley, 2000; Lipiec, 2001; Luoma, 2000; McCracken & Wallace, 2000b; McLagan, 1999; Noel & Dennehy, 1991; Torraco & Swanson, 1995; Ulrich, 1997). Garavan (1991) defined SHRD as:

> The strategic management of training, development and of management/ professional education interventions, so as to achieve the objectives of the organization while at the same time ensuring the full utilization of the knowledge in detail and skills of individual employees. It is concerned with the management of employee learning for the long term keeping in mind the explicit corporate and business strategies. (p. 17)

This is in contrast to the traditional HRD paradigm. Beer and Spector (1989) explained that strategic HRD can be viewed as a proactive, system-wide intervention that is linked to strategic planning and culture change. This is a clear departure from the traditional HRD model consisting of "reactive piecemeal interventions in response to specific problems" (Beer & Spector, 1989, p. 25).

Gilley and Maycunich (1998) described the shifts that typically occur in the HRD function – from no HRD, to one-person HRD, to vendor-driven HRD, to vendor-customized HRD, to decentralized performance improvement of HRD, and to strategically integrated HRD (p. 26). Their comparison of HRD and SHRD is described in Table 2. Garavan (1995) and Luoma (2000) considered the operationalization SHRD, suggesting that in order for HRD to be strategic it must be capability-driven at the organization or "macro" level, rather than at the individual level. Finally, McCraken and Wallace

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Table 2

Traditional HRD Compared to SHRD

Traditional HRD	SHRD
Individual/group effectiveness	Organizational effectiveness
Short term	Long term
Training	Performance management
Centralized	Decentralized
Trainer	Consultant
Cost	Investment

(2000b) provided a model and definition of SHRD, both of which are detailed in the next section.

The 21st Century

In 2000, the influx of technology and the drive for balance created new demands for HRD practice (McLagan, 1999). Based on Garavan's (1991) earlier work to shape SHRD characteristics (see Table 3), McCracken and Wallace (2000b) presented characteristics of SHRD as an "open system," which Daft (2001) defined as one that must continuously change and adapt to its environment (see Figure 4). McCracken and Wallace (2000b) later enhanced their model to highlight the "proactive and influential role" (p. 433) of SHRD (see Table 3).

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Table 3

Comparison of SHRD Characteristics

Garavan (1991)	McCracken and Wallace (2000b)
Integration with organizational missions and goals	Shaping organizational missions and goals
Top management support	Top management leadership
Environmental scanning	Environment scanning by senior management specifically in HRD terms
HRD plans and policies	HRD strategies, policies and plans
Line manager commitment and involvement	Strategic partnerships with line management
Existence of complementary HRM activities	Strategic partnerships with HRM
Expanded trainer role	Trainers as organizational change consultants
Recognition of culture	Ability to influence corporate culture
Emphasis on evaluation	Emphasis on cost effective evaluation

Note. Adapted from "Towards a redefinition of strategic HRD," 2000b, by M. McCracken & M. Wallace, p. 287, *Journal of European Industrial Training, 24*(5).

Dilemmas in HRD Practice

The evolution of HRD practice from its roots in training and performance improvement to the contemporary SHRD focus poses several dilemmas, as seen in the HRD literature in recent years. Following is a synthesis of those dilemmas, which are presented as the theoretical dilemma and the practice dilemma.

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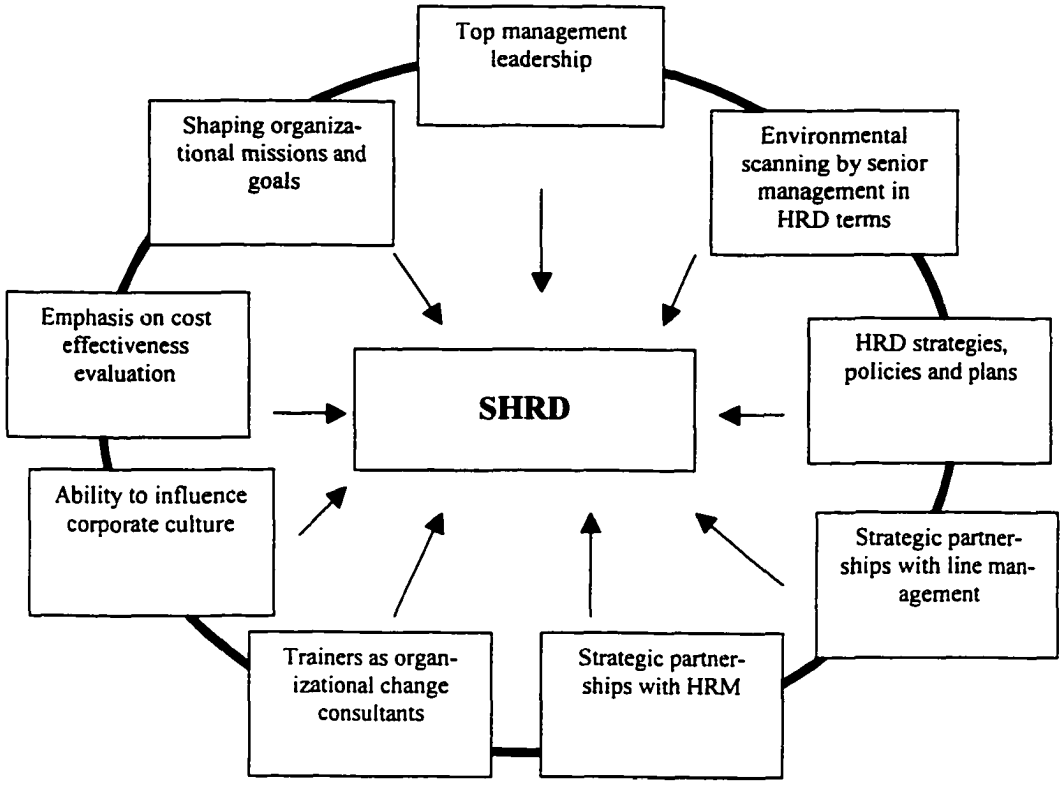

Figure 4. The SHRD "open system."

Note. Adapted from "Towards a redefinition of strategic HRD," 2000b, by M. McCracken & M. Wallace, p. 286, *Journal of European Industrial Training, 24*(5).

Theoretical Dilemma

There is a clear need to strengthen the body of HRD knowledge. The theory dilemma in HRD appears to have emerged in the 1990s when researchers began to call for theory building as a way to advance the field toward maturity (Lynham, 2000). In that time, several others (Chalosfsky, 1996, 1998; Hardy 1999; Hatcher, 1999; Ruona & Lynham; 1999; Shindell, 1999; Swanson & Holton, 1997; Torraco 1994, 1997) in and outside

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of HRD called attention to the theory dilemma. Three major themes associated with this ongoing dilemma are noteworthy.

First, HRD is an applied field that lacks a disciplinary core. Many in the field have viewed it as a blend of techniques, fads, or gimmicks. Others have commented that HRD is not anchored in one theoretical tradition, nor does it have a strong research foundation (Dilworth & Redding, 1999), and most of it is published in nonacademic journals (Garavan et al., 1999). Elliott (2000) wrote that the field "consists of several indistinct areas with no recognizable boundaries" (p.187). The theoretical underpinnings of the field have been drawn from adult learning, psychological theory, systems theory, economic theory, organization theory, and organization behavior (Evarts, 1998; Swanson, 1995), but there are wide and varying views about what "appropriate" HRD theory entails (Lynham, 2000). While the interdisciplinary nature of the field is often a barrier in HRD research, I agree with Elliott (2000), who sees the multiple theoretical dimensions as a strength. The tension could result in multiple research perspectives that could enrich the field (Lynham, 2000).

Second, there have been numerous calls for HRD theory to be developed. "Each individual will reinvent the wheel each time he or she approaches an HRD project. Without theory, the individual also has no framework to help with the understanding of the project and interpreting of results" (Evarts, 1998, pp. 387-388). Moreover, much of the HRD literature tends to focus on prescriptive rather than descriptive analytical models (Garavan et al., 1998). In a later article, Garavan et al. (1999) suggested the need for a more rigorous, scholarly, and theoretical base to HRD as an academic discipline. Short, Cassidy, Dewey, and Van Buren (2000), Kahnweiler and Otte (1997), and Evarts (1998)

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also mentioned the need for empirical research. Lynham (2000) suggested, "Sound theory and theory development are important to the maturity of HRD thought and practice" (p.175). He further argued that the field needs to move from its primary emphasis on methods toward "multiple theory-building research paradigms" (Lynham, 2000, p. 175). Evarts (1998) argued:

> HRD must understand the economic theory (which leads top management to ensure the organization's continued financial viability), the systems theory (which allows effective process improvements and redesigning), and the psychological theory (which deals with the needs of the individuals performing the jobs that must be fulfilled to achieve success). (p. 386)

Third, numerous articles have addressed the tension between HRD research and practice (Lynham, 2000). Lynham (2000) pointed to the applied nature of the field as one reason for this tension. The HRD field is impacted, as Lynham suggested, by a lack of HRD knowledge. While several authors have argued for more collaborative research between HRD researchers and practitioners, little appears to have been produced. Evarts (1998) was hopeful: "Academics and HRD professionals can work together to solve problems, to develop and validate theories, and to apply these theories to reap real benefits in the short term, and to strengthen the body of professional knowledge in the long term" (p. 388).

HRD Practice Dilemmas

Perceptions of HRD. Ulrich (1997) and Caster (2001) addressed the issue of negative perceptions of HR and related fields. Both authors commented that HR is often viewed as ineffective, incompetent, and costly. Gilley and Maycunich (1998, p. 25) mentioned the perception that HRD does not address real organizational problems compared to other organizational disciplines. Another problem has been the perception that HRD

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has little effect on the bottom line. Others have noted the continuing problem that HRD practice suffers from a lack of respect and credibility. There has yet to be a unifying model for practice, which was vigorously argued by Garavan et al. (1999): "Commentators have argued that consequently much of the literature is based on fads and gimmicks without any conceptual foundation" (p. 172). There is an observable bias toward micro models (Bushnell, 1990; Camp, Blanchard, & Husczo, 1986). Follis (2001) asserted:

> Managers generally recognize the importance of HR training, but one reason this type of training is often cut is due to an effort to minimize financial stress. Training is vital to the organization because it assists with the development and achievement of strategic goals, assuming that the training is directly related to the mission and vision of the organization. (p. 2)

The role of HRD. One reason why the field is fraught with confusion both within the practice and at top management levels is because the term HRD has multiple labels (e.g., organizational learning, training and development), multiple contexts, and covers a wide range of differing activities (Garavan, 1995).

Garavan et al. (1998) explained that two theoretical perspectives have dominated much of the HRD literature. One perspective focuses on "conducting skill gap analysis" (Garavan et al., 1998, p. 115) while the other perspective focuses on the systems perspective. Garavan et al. (1998) advocated a different view, suggesting a network/actor perspective that "conceptualizes HRD as a dynamic network of interactions between different actors and interest groups. It is based on the premise that HRD actors continuously engage in variable relationships that jointly influence HRD processes, strategies and outcomes" (p.115). Their study of over 100 HRD actors, including senior/top management, line managers, HRD specialists, HR managers, and trade union representatives, showed "varying degrees of convergence and divergence between the different HRD actors in

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terms of espoused values, roles expectations, and evaluation criteria" (Garavan et al., 1998, p. 115).

Inconsistencies in standards and practices. Another factor that contributes to the confusion about HRD is the lack of consistency in HRD standards and practices. Although a set of standards for HRD practice and ethics has been advanced by the American Society for Training and Development, other sets of standards and practices are being advanced by other HRD-related organizations (e.g., Academy of Human Resource Development and the Organization Development Institute). This creates a distinct challenge for HRD practitioner training, education, and development, a point that is expanded in Chapter IV.

Incongruities also exist in the functionality of HRD. Garavan et al. (1998) discussed strategic versus operational levels of HRD. Gilley and Maycunich (1998) observed, "Many HRD programs are perceived to be 'outside' the mainstream of the organization because they are viewed as merely internal training houses for employees" (p. 25). Training is not considered central to the organization's success nor are HRD professionals (Gilley & Maycunich, 1998, p. 45).

A different world. The influx of new technologies, globalization, new and more flexible organizational forms (e.g., decentralization, less bureaucracies), the focus on agility, and new competitive arrangements (e.g., strategic alliances and joint ventures) have contributed to the pressures facing HRD practice (Garavan et al., 1999). Given the different world of organizations today, expectations for HRD are changing. Dilworth (2001) commented about the need for less classroom instruction and the emergence of new practitioner roles.

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Different workforce – different learners. The sociology of the employment contract has been altered and company loyalty has been called a thing of the past (Burke, 1992). During the last century, our employment culture in the United States has moved from exploitation to paternalism to "free agency" (Packer, 2000, p. 42). Nevertheless recruiting, developing, and retaining an organization's workforce are still essential functions of organizational success, with jobs requiring long-term on-the-job training expected to grow by 9%, according to the U.S. Bureau and Labor Statistics (Packer, 2000, p. 41).

The trend toward "free agent learning" was identified by Packer (2000) who has seen three types of learning emerge: (a) employer-directed learning, with the purpose of adding value to the organization; (b) self-directed learning, with the same purpose, but the employee determines the how and when; and (c) free agent-learning, with the employee deciding when and how to meet his or her own learning goals (p. 41).

> The popular press, management consultants, and stock markets all say that intellectual assets are more important – and more valuable – than physical or financial assets. If those observers and investors are correct, then it's vital that we encourage and support learning in all modes. (Packer, 2000, p. 41)

Therefore, how HRD practitioners manage, train, coach and mentor the emerging free agent workers is critical.

HRD versus OD ownership. Ownership and control issues have been of major concern in the HRD literature (Garavan et al., 1998, p. 124). One area where this is evident is the ongoing tug of war between HRD and OD (Knowles, 1974; Sammut, 2001). The American Society of Training and Development lists OD as an HRD practice, and the Organization Development Institute includes HRD among the types of work that OD practitioners do.

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OD and HRD activities do overlap (Nadler & Nadler, 1989), which perpetuates the confusion about both fields. The move by some HRD directors to change their titles to reflect an OD functional role blurred the distinctions between the two (Nadler & Nadler, 1989). However, Nadler and Nadler (1989) maintained that "each field requires different competencies, in part because each has its origins in a different academic discipline" (p. 35).

Theory versus practice. Yet another dilemma in HRD is an underlying tension between researchers/theorists and practitioners. This problem is not unique to HRD. Howell and Koskela (1999) discussed the theory-practice debate in the field of construction: "The 'T' word is something we simply don't like to talk about in construction. Academics think it is what they do that is different or in opposition to what practitioners do, and practitioners think a theory is a hypothetical idea untested in practice" (p. 2). "Within the academy, there are 'arguments about the nature of the model' and at the construction site, practitioners are saying, 'this isn't production son'" (Howell & Koskela, 1999, p. 2). They claim a "different view of the gap," suggesting that it is "the direct result of a lack of theory" (Howell & Koskela, 1999, p. 2).

Resistance to change. While the foundation of HRD practice has historically been training, education, and development at the individual and group levels, researchers have observed that practitioners have resisted the shift to new roles and have not fully embraced the SHRD paradigm (Harrison, 1997; McLagan, 1999). Harrison (1997) observed:

> Many trainers find the phrase strategic human resource development difficult to accept, preferring training and development.

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> Organizations place extreme pressure on HRD processionals to solve performance problems. As a consequence, they react by giving a simple solution (training) to a set of complex problems.
>
> HRD has a difficult time saying "no" to management when a training solution is requested.
>
> Some HRD professionals are afraid to take changes.
>
> Many HRD see training as an end in itself.
>
> Training has a beginning and an end.
>
> Many in HRD assume that performance will improve if training takes place.
>
> Some HRD professionals cannot let go of their fear of losing their "safe and secure" training positions.
>
> A real serious problem facing HRD is the lack of qualified and capable HRD professionals willing to make the transition from trainer to organization development consultant.
>
> Some HRD practitioners have spent a lifetime building an HRD "kingdom" within their organizations, complete with a large budget, many employees and perceived organization respect. Key word – perceived. (p. 1)

Discussion

Multiple definitions, theoretical underpinnings and standards of practice, questions of effectiveness and legitimacy, and new agendas for practice proliferate the HRD literature. "There is a need for improved practice, which is a difficult notion given that the fields are divided as to what constitutes good practice and there is not a single set of professional standards for either field" (Luoma, 1997, p. 1).

This study supports the view suggested by Evarts (1998) and others who argued that in order for HRD practice to reach the level of maturity it is seeking as a strategic organizational player, a clear definition and body of knowledge is needed. While the tensions and dilemmas previously stated are important to address, they also present the opportunity to refine practice.

Suggestions for bridging the gap between HRD theory and practice abound in the literature. Some have suggested that practitioners should take more initiative to shape

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and drive HRD research agenda. Others have suggested that researchers and practitioners work collaboratively to create a stronger link between HRD theory and practice. Howell and Koskela (1999) addressed this notion in the construction industry. They proposed a model that helps both academics and practitioners. They should focus on a common set of questions including: (a) What is it (concepts), (b) How should it be done (principles), and (c) How do we do it (methodologies)? HRD academics and practitioners should learn how to quickly import and export knowledge so that it improves practice at a rate commensurate with business needs.

Preparation for Strategic Roles

It has been postulated that there is a need for HRD to be strategically focused, but the field lacks a set of standards or guidelines for education and practice. This presents a problem in attempting to advance SHRD, and it may explain why, as Garavan et al. (1998) argued, HRD has not fully bought into SHRD roles. What should be done to remedy the gap between HRD and SHRD knowledge, skills, and capabilities?

First, practitioners must overcome resistance to SHRD, which does not mean that the traditional HRD view has to be cast out. It means that practitioners must now practice the very techniques and theories that are employed to transform people and ultimately organizations, and move toward a new level of practice (McClean, 1995). Moreover, HRD seems to struggle with the discontinuity of traditional HRD practice (training, education, and development) and SHRD. Gilley and Maycunich (1998) mentioned a concern about why HRD practitioners think and behave the way they do, arguing that practitioners need to "burn the mothership" (p. 38). The effectiveness of HRD in future years will depend on practitioners willing to leave the traditional ship and chart a

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new course. One reason that HRD practitioners have been slow to change is that SHRD requires a different set of thinking and performance skills. Garavan et al. (1999) contended that SHRD requires "greater theoretical rigor and more rigorous evaluation of the outputs and outcomes of HRD" (p. 176). This level of thinking and accountability may, in fact, be a contributing factor to the recoiling behaviors of practitioners who may now feel threatened. "The opportunities exist for human resource managers to play a strategic role, but these opportunities will not be handed to us" (Micolo, 1999, p. 7).

Second, there is a need for SHRD to be "operationalized." A pragmatic approach to SHRD is now needed whereby practitioners and researchers move from "need to do" to the "how to do" questions. This level of examination should address the roles as well as the knowledge, skills, and capabilities needed for SHRD practice. Fredericks and Stewart (1996) argued that if HRD wants to rise to a level of strategic partner, the impact will need to be made at the macro level. To do so, they suggested, HRD must be "concerned with exposing, examining, questioning, and challenging the nature and extent of (individual) action possibilities as a contribution to facilitating the continuous development of organization capability to support long-term survival" (Fredericks & Stewart, 1996, p. 118). They proposed "three critical concepts" to form the basis of strategic HRD: (a) organization design, (b) organization strategy, and (c) management or leadership style.

Fundamentally, SHRD needs to be clarified in terms of what it means to be a strategic partner and what it means to be strategically competent. Luoma (2000) advocated the need for capability-driven HRD as a way to link organization strategy and HRD practice. Moreover, Semler (1997) noted, "HRD does not have to be limited to a function or

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department within the organization" (p. 38). HRD practitioners need to develop competencies in the "hard" skills areas such as finance, marketing, and operations as well as training and intervention design. To be strategic, practitioners cannot ignore these dimensions if they are to become real players. Nothing was found in the HRD literature that describes a strategically competent practitioner. This phenomenon is explored further in Chapter III.

Third, practitioners and researchers should work collaboratively to provide useful research for expanded audiences. McClean (1995) suggested business partnerships between academics, professional development program leaders and practitioners, as well as the development of business sponsorships for HRD for research. Finally, HRD education and professional development leaders should take the initiative to reexamine their curricula and evaluate the extent to which strategic competence is addressed. This question is addressed further in Chapter IV.

Conclusions

This review of the literature suggests that there are different conceptions of HRD. SHRD has emerged in response to new and more complex organizational needs. The review of the literature presented in this chapter provides an indication of how the roles may develop in the future.

If HRD is going to be a viable strategic partner in this time of merger and acquisitions, downsizing, and new organizational forms, it is then time to consider how practitioners are prepared to respond. This chapter examined and synthesized the conceptual themes in the recent HRD literature in an effort to describe how the field has evolved from a traditional training and development view to a strategic view of HRD. Two im-

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plications serve as a starting point for further exploration of SHRD practice and strategic competence. As HRD shrifts its orientation to SHRD and focuses on enterprise-wide transformations, there is a need for:

1. HRD practitioners to "retool" their knowledge, skills and capabilities with a greater emphasis on strategic competence; and

2. HRD education and professional development programs to equip practitioners to fit a strategic management profile. Reexamination of HRD curricula is needed to assure a strategic "fit."

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CHAPTER III

THE SCHOLARSHIP OF APPLICATION: STRATEGIC COMPETENCE IN HRD – EXPLORING ITS MEANING AND UTILITY IN PRACTICE

The previous chapter concluded that HRD practitioners need to "retool" their knowledge, skills, and capabilities with a greater emphasis on strategic competence. However, no competency models currently exist. Accordingly, this chapter addresses the questions: What competencies (knowledge, skills, and capabilities) have been identified for SHRD practice, and to what extent are those competencies being developed in undergraduate and graduate HRD education?

This chapter explores what it means to think and perform strategically as an HRD practitioner. The first section draws on my background and practitioner experience, providing insights into the thinking that underpins the arguments for strategic competence in HRD practice. The second section explores the concept of strategic competence and presents preliminary findings in an effort to determine the knowledge, skills, capabilities, and characteristics needed for SHRD practice. This groundwork will prove to be useful to HRD educators and professional development program leaders.

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Reflections of an HRD Practitioner

Early Childhood Experience

I began working in the field of learning in the early 1970s (around the age of 8) when I decided to organize a summer school session in my driveway. A half dozen of my playmates faithfully arrived each day with their "tuition" of 10 cents in hand. I cannot recall exactly what the curriculum entailed, and I am certain that I was not concerned about any particular measurable outcomes, other than playing school. Many years later, my father asked me how I got my students to come to my "school," which required sitting outside in the Texas summer heat. I have a vague memory of handing out treats purchased with the tuition fund I had collected. So at a tender age, I was already planning, leading, and engaging others in the process of learning.

Early Orientation to Work and Career

My parents played a pivotal role in orienting me to the nuances of work, professionalism, leadership, and career building. In fact, a photo taken of me at age 3 (see Appendix A) shows a pint-sized professional clad in professional dress holding a note pad. If you look closely on the note pad, you can see that I had generated some very important ideas.

I like to report the fact that my father, a hospital administrator, was taking his daughter to work before the concept turned into a national movement. He provided valuable coaching during my middle school years. He insisted that before I spent a day with him at the hospital I had to practice how to introduce myself, and I had to prepare questions to ask each person I was to "shadow." Learning the importance of asking questions and how to ask them was a critical lesson. I value the practical teachings my parents

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passed along. The fundamentals of being a competent professional were drilled over and over again: writing well, organizing for efficiency and effectiveness, putting your best foot forward, speaking clearly and with confidence, asking questions, and most importantly, being prepared.

High School/College

My leadership and organizational skills were honed in high school and college. While cleaning out old files several years ago, I ran across two documents that were surprising. It not only reminded me of what a workhorse I became at such a young age, it illustrated how much of what I do as a practitioner today was defined during that time.

The first document was a strategy my classmates and I developed to resurrect Homecoming at my high school. I found this experience to be my first foray into leading and organizing. The strategies read:

> 1. Meet with the principal and other administrators to gain their support and confidence (appeal to the increase in school spirit and emphasize that we would raise our own funds);
>
> 2. Get other students on the "exploratory" committee to talk up the concept with their parents (of course the parents who served on the Parent-Teacher Association Board were targeted); and
>
> 3. Solicit the PTA to help in coordinating the fundraising effort.

The second document was an assessment of student life at my college through the eyes of freshman students. Early in my freshman year, I met some aspects of student life that I did not consider appropriate or acceptable, and I encountered other students who shared my view. Following the winter break, I returned to school with the idea of pushing the administration toward at least taking a look at the student culture and questioning whether or not it added value to or detracted from the student life experience. After

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spending several days in the library researching how to conduct a survey, I constructed a questionnaire and a list of interview questions, and I went from dorm to dorm to gather data. I found out that most freshmen were not in favor of the traditional system, but they did not have many ideas, or the inclination to challenge it. I completed my report by the end of the semester, but by then I had decided to transfer to another college. A year later, I received a letter from the new college president that had been sent to all former students. In it she announced that after a lengthy process, several of the college's traditions had been discontinued and would no longer be tolerated. She went on to explain the new vision for student life. While I never knew the degree to which my efforts made a difference in that process, I looked back on what resulted and felt a sense of great satisfaction. More importantly, I realized that I had a voice and the ability to intuit opportunities for change.

Throughout my reflections on my childhood and years as a young adult, it seems clear that I possessed a strong sense of who I was, and I knew early on that I was capable of grasping and doing many different things. But the common denominator was an emerging passion for change, leading it, and becoming inquisitive about why things are the way they are.

Internal Corporate HRD Experience:
Navigating Turbulence

I joined The Automotive Company as program coordinator in 1996 after spending 3 years in the nonprofit sector. I soon became a project leader, developing and supporting others in implementing several change initiatives in the Purchasing and Supplier Quality division. The projects included a growth plan for a corporate university, developing a supplier diversity program, and choreographing large-scale events to inform

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oping a supplier diversity program, and choreographing large-scale events to inform suppliers about superior quality and recognize those that achieved high quality standards. This experience was a key factor in shaping my current beliefs about what it means to be a strategically integrated practitioner.

The organizational structure at The Automotive Company was different from any other organization I had experienced. While there were defined functional business units (e.g., purchasing, manufacturing, human resources, finance, marketing, corporate communications), the structure was a complex matrix. This means that there multiple reporting schemes exist at varying levels of the organization, domestic and global, and team members typically have cross-functional roles in multiple divisions. I found that the way to be viewed as "relevant" to the business was to hone a broad set of capabilities that would transcend my training and expertise. That made sense in theory, but putting it into practice and managing a career in a unique role was not a simple task. Having always been the creative visionary type, it was challenging to adapt from being prone to "soft skills" activities to being engaged in a functional area that rewards bottom-line results. My results were typically transparent compared to generating cost savings or other financial measures of achievement. So I was initially perplexed as to how was I going to stay competitive in this individual contributor role and make sure that I was adding value on an ongoing basis.

The same year I started working at The Automotive Company, I began doctoral study in HRD. I became an idealist, believing that much can be done in my organization to create a healthy and "high performance" work environment. I soon discovered that the rate of change is so great that leaders are having difficulty keeping pace with day-to-day

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departmental needs let alone the developmental needs of its employees. When the Company's strategic plan was introduced to our division, the subject of employee enthusiasm was met with cynicism among the employees I see everyday. That was not at all surprising given the new climate of downsizing and uncertainty. What was particularly disturbing was the level of apathy I observed through overt and covert employee behaviors. I sensed a "disconnect" between what the organization promotes as its guiding principles and what the organization practices. This sparked a personal mission and an opportunity to make some sense of what was happening.

My knowledge of organization theory informed several recommendations I made to top management. When I heard about another round of downsizing, I called my mentor Lou (pseudonym) to ask how our division could avoid the negative backlash that occurred as a result of the previous announcement. He sounded relieved to hear from me and advised that I write up some strategies. He asked how soon I could get it to him and John (pseudonym), our vice president. Of course, I was on my way to the airport for a week-long business trip, so I told him not to expect a fancy proposal. I would have to write something up on the flight and fax it to him from the next airport during a layover. During the 90-minute flight I managed to generate a list of 20 strategies and some "do's and don'ts" for releasing bad news to employees. I worked from my memory of hearing the water cooler conversations following the previous year's round of bad news. I had made mental notes of what should be avoided the next time. So off went the fax when I arrived at the Dayton airport. I did not hear anything – no voice mail or email – from the boss, so I chalked it up to experience. Maybe John did not want the advice after all. The

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following week our division was called together for an announcement. As I listened to John's presentation, I started hearing the familiar words of my memo.

The "Hot Group"

In 2000, I developed an informal relationship with members of The Automotive Company's Competitive Benchmarking Team, and with true entrepreneurial spirit we began a long series of conversations about what could be done to reinvent The Automotive Company. We thought out loud together, boldly suggesting that the life cycle of the organization had entered a dangerous zone. Our months of discussion generated several themes:

> Environment – "Business is changing at warp speed. When did things start to change and why?"
>
> Top Management – "We have to figure out how to get top management to realize that there is a need for organizational change. We need to get them thinking. We need to show them how the target was moving. Many of them were not around when the original dream was first realized."
>
> The Organizational Spirit – "People tend to shut down when times are bad. We need to recapture the spirit by refocusing on what we are supposed to be about."
>
> The Difference – "Our company was created to be different, but what does that difference mean at this point in time?
>
> Training – "We've developed these people, now what do we do? The way it's done today doesn't meet the need.
>
> Teams – "How effective are they today? What is an effective team? How long will the parent company allow us to experiment with this team thing? We're starting to post major losses."

For me, these discussions were "strategic nirvana!" This is what I am cut out to do and the kind of work that excites me. The neat thing was that none of us was asked to think about any of this. We were four people who Lipman-Blumen and Leavitt (1999)

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would describe as a "hot group," a small pocket of informally connected people with "a distinctive state of mind" (p. 3). Our group's mindset was strategic. We kept at it, thinking:

> If the essence of our organization is three things - PRODUCT, PROCESS, & PEOPLE – where are we effective? What's right? What's wrong? What's on the fence? Some of the assembly line workers were saying, "Things are just all screwed up." But as one of our group members who worked on the line said, we can't fix "it's all screwed up. Tell me to fix the door handle, and I can get to work."

We decided that we would form a group called the Genesis Group. The purpose of the group would be to recreate the original process that formed The Automotive Company. That group had a blank sheet of paper. We started there. We explored what was good about the current state of the business. We thought about what was borderline and what should we stop doing. Is the message still the right one? Is the methodology right? They (the original visionaries) were risk-takers. They had passion. They led, but they could not make tough decisions. We live today with their indecisions. What could we learn and apply from all of that? We found a mission: Figure out how to "leap frog" the competition and survive.

The Benchmarking team leader made the pitch to top management. The CEO was intrigued. A few months went by without much movement on the idea. Then organizational politics killed the Genesis project. Interestingly, the concept did emerge a year later under a different name and with a different group of players. Once again, I learned that being a change agent does not necessarily mean that you get to implement your own innovations, and I learned that that is okay.

What I learned throughout my experience at The Automotive Company was to trust my intuition. Most of the time, my team did not have the luxury of conducting

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extensive research when starting up a new training project or intervention. We had to respond – often in the moment – to what was hot from day to day. I think this is where HRD education falls short. A needs analysis – typically the first step in developing a training program – is time-consuming and costly, as is high-level training evaluation (e.g., measuring return-on-investment). What I needed as a novice practitioner was the experience of working under extreme pressure, making strategic decisions as a member of multiple cross-functional teams, and learning how to navigate the larger organizational system. Experience taught me many lessons, but I wonder if a "strategic" HRD education would have better prepared me for these realities?

External HRD Experience:
The Emerging Consultant

By the end of the year 2000, I decided to give myself 1 year to find out what it is like to be an external consultant. I wanted to experience what it was like to be in a dual role of scholar-practitioner. How could I apply my theory and practice as a consultant? I felt confident in my ability to teach, lead, and be a strategic HRD practitioner, but bridging theory and practice required "being, doing, and becoming" simultaneously, and I found that challenging.

The New York Experience

A friend who landed a fantastic job in New York City called just as I was transitioning from full-time to consulting work. She was a 32-year-old "super achiever" leading an information technology unit at a large hospital. She was lamenting her decision to leave the comforts of Nashville, her fiancé, and her circle of friends. The job was a battle zone. The more she talked, the more flashbacks I had to my own experience as a

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first-time supervisor. Of course, I asked how I could help. We decided that I would travel there the following week.

I took a few days to get myself organized for this first consulting experience. I prepared my toolkit, reading up on management issues, researching articles, and finding leadership assessment tools. Once on site, that preparation was only useful to the extent that it was a refresher on past course work. The consulting experience ended up being a long coaching session, in which I mostly listened and served as a sounding board. We talked about the frustrations of being a change agent (I suggested involving more people in the process). We tried to figure out how to navigate a huge hospital system (I suggested developing a network that included people outside of her division to learn the "real" system). We also enjoyed navigating a new city (we started by buying a map).

I learned some valuable lessons from this experience. Most importantly was in establishing the client relationship. I discovered my pattern of jumping into action. The real work was in listening and observing to get a strong sense of what was going on. Being an expert does not always require forging ahead. D. Tobey (personal communication, March 6, 2002) would call this action "listening to the source." D. Tobey and D. Savage (personal communication, February 15, 2002) have the expression, "We become so enraptured by the sound of the echo that we seldom seek the source."

The "Harmony College" Experience

"We need your help," was the opening of a telephone conversation I had with the assistant to the president of a small, private, liberal arts university. "The president's office has been getting feedback about some of our administrative staff, and we need to do some customer service training. Can you put something together for us?" While not a

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unique request, because I "do training," my experience as an HRD and OD practitioner prompted a series of questions. Why training? What are the underlying issues surrounding the perceived need for training? Where is the feedback coming from, and who is giving it? Are there barriers to staff being able to perform to expectations? What are the job expectations? The line of questioning led the caller and me to conclude that "customer service" training was probably not the most appropriate solution at this point.

My instincts suggested that this was potentially a case of unclear expectations requiring a dose of job analysis and performance feedback. However, having completed coursework in training design, I was reminded of the warning my instructor offered. Whenever a potential client contacts you with a specific training request, beware! It is usually a sign that there are underlying issues that a simple training intervention cannot correct. Banishing the administrative support staff to mandatory training could be a costly "fire-ready-aim" scenario. This exchange is not uncommon in my experience, but it sparked an eventful voyage into new territory as a practitioner, the practice of HRD and OD in an academic institution.

At the time, this academic institution was preparing to embark on a long-term journey toward organization transformation and renewal. Guided by the vision to become "First Choice," the institution had set its course to begin a Renaissance period in its history. The conversations with senior officers about the need for customer service training led to little agreement about what the training would entail, but a lively discussion ensued about the institutional vision and mission. It quickly became apparent that a customer service training solution was premature. The broader issues of understanding the organizational climate and culture, testing the environment for "change readiness," and

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aligning staff with a new institutional vision were now paramount. A systematic approach could shepherd this process, as opposed to a one-shot "fire-ready-aim" training intervention.

My question was: What causes their inability to perform satisfactorily? This led to the realization that there are neither written performance standards nor adequate communication from middle and upper management. This was a significant learning experience for me. Had I gone in and delivered customer service training, it still would not have addressed the root of the problem, which had a lot to do with the absence of clear expectations! The real questions were:

1. What does Harmony College want to be in this new century?
2. What is the Harmony College culture, and is there a readiness for change?
3. What strategies and interventions are necessary to bridge the gap between where (and how) the institution wants to be and where it is today?

This experience drew me closer to what I now consider to be the essence of strategic competence: the knowledge to know the right questions to ask, the skills to help others in asking the right questions, and the capabilities to move a group (with diplomacy and flexibility) from idea generation to action.

Deep Learning

Semler (1997) contended, "Reflective HRD practitioners frequently seek to develop convincing and effective models that will help them understand and address organizational performance issues" (p. 23). My reflections on internal and external HRD practice revealed what Senge, Roberts, Ross, Smith, and Kleiner (1994) called a "deep learning cycle," which has allowed the emergence of (a) new skills and capabilities,

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(b) an awareness and new sensibilities about my practice, and (c) an assessment of my attitudes and beliefs about practice.

Today, I work as a sole practitioner in an HRD/OD practice (see Appendix A). One-size-fits-all processes or training programs run counter to my consulting philosophy. Some practitioners hold on to tried and true methods that will ensure a solid outcome. But my experience has led me to reconsider the ways that I use the methods that I have been taught.

When I encounter new projects with clients, I begin with questions: What are the presenting issues and what is the desired state? Rather than using conventional training models, I prefer having strategic conversations, which requires practice. I often found that the intervention or training program that I developed was cast aside once the participants were in the room. I found myself facilitating strategic conversations (Liedtka, 1999) rather than relying on the training materials I had designed. Soon, I developed a level of confidence to move away from structured processes and into real-time problem solving.

Pat, an internal HRD consultant in an academic setting, talked about this approach when I was uncertain about using it. She said that when a department calls her in to do training, she often arrives empty-handed, gathers the participants around the table, and engages them in a strategic conversation. She said, "I just show up, listen to what the client says they want, and then I decide what kind of conversation we need to have" (Personal communication, October 2001).

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Self-navigation

In my childhood years, a developmental path for HRD work was evident early on. I saw a pattern of entrepreneurial spirit, self-motivation and initiative, and leadership and risk-taking. These capabilities form what C. Walker and Moses (1996) called self-navigators, defined as the mid "thirty-something's" who "reject tradition and conformity" and believe that "it's up to me to create my own well being" (p. 39). C. Walker and Moses (1996) further explained, "In a fast-changing and often hostile world, self-navigation means recycling oneself to be the captain of one's own ship and charting one's own course. It means resolving the opposing forces of uncertainty and endless possibilities that surround us" (p. 39). Competence, they indicated, is a key value to self-navigators.

The Strategic Practitioner's Dilemma

The opportunity to reflect on my own practice yielded some key insights and has brought me to what I call the strategic practitioner's dilemma. My work as an HRD practitioner has evolved into a multi-faceted specialization. In my internal role at The Automotive Company, my ability to understand the organization at four levels – individual, group, departmental, and organizational – and to identify trends and opportunities for improvement at each of those levels allowed me to initiate and carry out complex assignments, but I struggled to develop an official defined role for the strategic work I was doing. Throughout my reflections are situations in which strategic thinking skills were a valuable asset to my growth and efforts as a developing practitioner. I found that the way to be perceived as a valuable resource to the business was to hone a broad set of capabilities that transcend my training and expertise. I believed that it was an important and

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much-needed role that required a high level of business knowledge and the ability to navigate through turbulence. At the time, it proved difficult to sell that type of role to management. It turns out that downsizing and a major organizational restructure were around the corner.

In my external consulting role, I have found a better platform to be able to explore the role of being a strategic partner. There are, however, a different set of challenges that emerge. One is the practice of managing client expectations and building relationships that inspire trust. Another challenge is in having to quickly assess organizational dynamics (e.g., culture and politics) that are more easily ascertained in an internal consulting role.

While HRD practice is evolving toward new forms of practice, little exploration has been done to test how the shifting needs of organizations and expectations of organizational leaders translate into practice and how practitioners are preparing to fill strategic organizational roles. Internal and external HRD practice requires a distinctive set of knowledge, skills, capabilities, and characteristics. In my own professional development efforts I was unable to find the types of conferences and learning experiences that related to what I was doing. I was not necessarily designing and delivering training, nor was I a traditional HR practitioner. I found myself asking the question: Where does a practitioner go to develop their skills at a strategic organizational level? I was excited about the strategy work I was engaged in at The Automotive Company. Do I join a corporate intelligence team? I liked generating ideas and figuring out how to advance the organization, but my experience and position did not put me at the CEO's table.

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In the following section, I explore the notion of strategic competence and attempt to define it and the related knowledge, skills, capabilities, and characteristics that may be useful to HRD educators and professional development program leaders.

Strategic Competence: Mapping the Terrain

> The greatest and most critical obstacle to finding solutions to our problems (or preventing them in the first place) is the thinking process that we employ, the set of values and modes of reasoning endemic in our society. (Nadler & Hibino, 1999, p. 49)

In McCain's (1999) article about aligning training with business strategies, he described an experience he had with a group of practitioners who were attempting to evaluate the effectiveness of their HRD programs. McCain asked the group to describe the five major initiatives or corporate objectives that their organization was attempting in the next year (p. 51). He reported that no one in the group could answer that question.

Thompson and Cole (1997) argued that "strategic success demands competence" (p. 153). As Nadler and Hibino (1999) noted, "One would have to be a literal hermit not to notice that the world is changing" (p. 102). Organizations are changing, and people are changing at a staggering rate.

I contend that being a competent practitioner should not be based solely on the techniques that can be performed. Today's organizational problems cannot be solved with linear thinking processes. No matter our level of experience, we must all learn, develop, and continuously hone our ability to think and perform strategically. The ability to think and perform strategically will transcend organizational crises and uncertainty, leadership transitions, and management fads that will surely come and go. The fundamental HRD competency should be the ability to think and act strategically in whatever role we

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find ourselves. If HRD practitioners are to practice in strategic roles, it is critical that they perform with a level of business knowledge and a set of knowledge, skills, capabilities, and characteristics that, at the present time, are not clearly defined. The question is, what knowledge, skills, and capabilities lead to strategic competence? In order to explore the concept further, it is important to first understand the concept of strategy and why it is important and valuable to HRD practice.

The term "strategic partner" is commonly used to describe HR practitioners who play fully integrated strategic organizational roles (Ulrich, 1997). According to Ulrich (1997), the term describes one who can "force organizational issues into strategic discussion before strategies are decided" (p. 57). A strategic partner must also be held accountable to the same standards for results as other organizational leaders (p. 58) and provide "intellectual leadership on the HR dimension" (p.58). Finally, Ulrich wrote the strategic partner must have the ability to develop organizational capabilities, or "what a firm is able to do or needs to do according to its strategy" (p. 63).

Given this new thinking on strategic organizational roles and the shift toward fully integrated SHRD, practitioners must be prepared and possibly "retooled" in order to make the shift to effective SHRD practice.

The Concept of Strategy

Bruce and Langdon (2000) described strategy in its early military context when plans for war were defined and executed. In the business context they defined strategy as "a map of the future" and "a declaration of intent, defining where you want to be in the long term" (Bruce & Langdon, 2000, p. 6). They further explained that understanding strategy involves understanding "the process involved and how to avoid potential pitfalls

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to help you plan successful strategies" (Bruce & Langdon, 2000, p. 6). Porter (1985) suggested that organizations must pay attention to both operating efficiencies and strategic positioning in order to acquire and maintain competitive advantage. This requires the development of resources and competencies throughout the organization (Thompson & Cole, 1997).

Why are strategy and strategic competence important? Von Oetinger (2001) attempted to build a case by suggesting that "the relentless search for insights is what keeps innovative companies and courageous entrepreneurs busy day and night" (p. 42). Liedtka (1997) said, "Success in the world of the future requires an ability to continuously redesign what we do" (p. 9). Lasher (1999) described strategy as "essentially how the firm interacts with its environment to achieve its mission and associated objectives" (p. 4). In today's competitive and unpredictable marketplace, an organization's capacity to be responsive is critical. It is not unusual to find organizations searching for new ways to tap innovation to gain market leadership. Linkow (1999) said, "The purpose of strategy is to align and integrate the daily work of all employees around a common, focused direction" (p. 1). The question that HRD practitioners should be asking is, "To what extent is my role designed to help my organization remain viable and agile under these circumstances?" HRD practitioners should be concerned about strategy because it is directly tied to organizational effectiveness. However, this way of thinking and action is not always emphasized in current HRD education. If HRD practitioners are to facilitate strategic thinking and action, then it is imperative for HRD practice to be strategically oriented. As Thompson and Cole (1997) suggested, "Unless they are aware of their competitive

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environment, they will not know what they don't know" (p. 156)! This point is explored further in Chapter IV.

Strategic Thinking

The following was posted on the ABC television website:

> My boss criticizes me for not thinking strategically, but he doesn't give me advice on how to think strategically. Help! (Rosner, 2002, n.p.)

Thompson and Cole (1997) maintained, "Managers must be able to design winning competitive paradigms and then change these continuously and sometimes discontinuously if their organization is at least to stay crisis-averse and ideally grow and prosper" (p. 153). The authors explained further that this type of ongoing paradigm shifting requires a certain level of competence at the individual level. Here they referred to awareness (e.g., external environment) and the ability to think strategically.

Strategic thinking has been defined as:

> (1) a holistic understanding of the organization and its environment; (2) creativity; and (3) a vision for the future of the organization. (Bonn, 2001, p. 64)

> Strategic thinking is both creative and analytic. It is an iterative process you cycle through continuously, learning something new with each pass that allows you to develop a better hypothesis for the next pass. It is intelligently opportunistic in search of its goals, in a way that enhances the intended strategy. (Leidtka, 1997, p. 11)

> Thinking about the future – not just random thoughts – but specific thinking about specific future issues. . . . It sets the stage for you to take action now. . . . It encompasses a whole range of topics from the values and vision to the plan for organizational development. From market positioning to capital planning to leadership succession. From corporate culture to leadership styles. (Hamilton Strategic Management Group, 2002, n.p.)

Liedtka (1999) portended that:

> strategic thinkers have a broad field of view and see both the whole and the connections between the pieces. They are driven by a strategic intent or larger vision

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> that includes a sense of where the future connects and disconnects with the past and where it demands anew in the present. (p. 9)

The process of strategic thinking is viewed as a creative process that draws on experience, risk-taking, and critical thinking skills (Liedtka, 1999, p. 9). Strategic thinking is viewed in this study as an essential element of building strategic competence.

Defining Strategic Competence

While not a precise textbook definition, Thompson and Cole's (1997) description of "inter-dependent" competencies was found. They described it as a conceptual framework with three content areas: (a) the content of actual strategies, (b) strategic change competencies, and (c) strategic learning competencies (p. 157). A review of official HRD core competencies published by the American Society for Training and Development (2002b), as shown in Figure 5, suggests that the practice continues to reflect the same traditional roles, values, and principles that were conceptualized when the field got its start in the 1950s and 1960s. This is not a new concern among researchers.

In a study of HRD competencies among graduate students and practitioners, Davis (2001) found that both groups believed that they were "least prepared" in the area of business competencies (p. iv). These two examples underscore the need for further investigation of strategic competence and its potential for improving HRD practice. Gaudet and Kotrlik's (1995) study of HRD certificate programs concluded that no standard qualifications or education requirements exist.

Strategic competence, as it relates to HRD practitioners, requires awareness and certain abilities to be capable of facilitating, developing, and implementing the appropriate interventions in today's organizations. Drawing from the strategic thinking literature,

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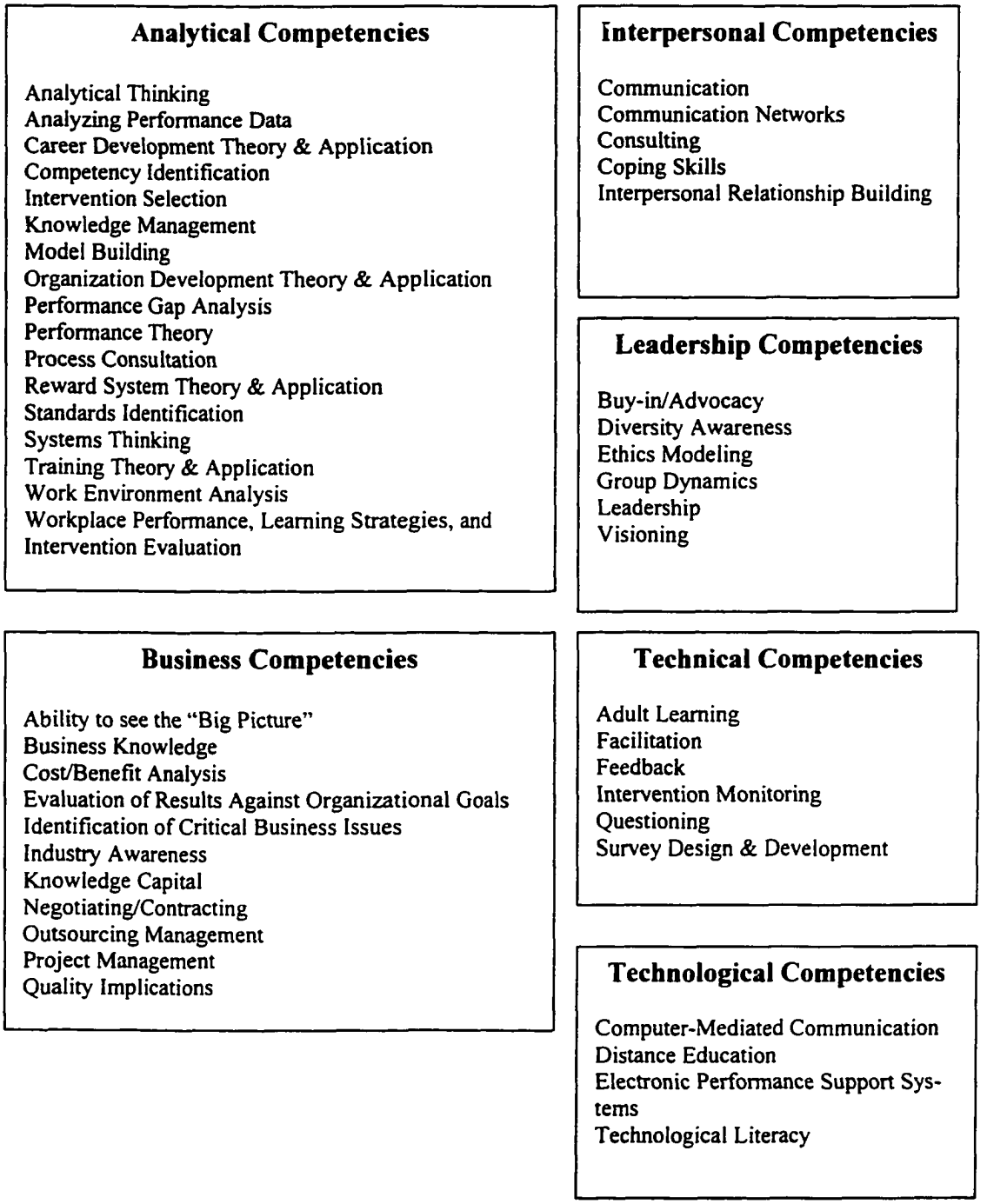

Figure 5. Current competency model for HRD practice.

Note. From *HRD Competencies,* 2002b, by American Society for Training and Development [Online], n.p.

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my working definition of strategic competence is: An individual's capacity to perform his or her job role with an orientation toward enterprise-wide, or macro level, thinking and action. The next question should be: If HRD practice is redefining itself as strategic (Gilley & Maycunich, 1998) and if practitioners are moving into strategic roles (Ulrich, 1997), then what knowledge, skills, capabilities, and characteristics should HRD educators and professional development program leaders develop? A framework for strategic competence is presented in the next section.

Towards a Strategic Competence Framework

Given the movement toward fully integrated and strategic human resource development (Gilley & Maycunich, 1998), this study recognizes the need to strengthen HRD practice by developing knowledge, skills and capabilities so that practitioners can become more competent and effective strategic partners in organizations.

Procedures

In order to create a framework for strategic competence, three procedures were conducted:

1. In Procedure 1, current HRD competency models were identified and evaluated for evidence of strategic competence.

2. In Procedure 2, articles relating strategic human resource development and organization strategy were reviewed to identify knowledge, skills, capabilities, and characteristics that might relate to strategic competence. Key words such as competence, change agent, change management, trainer, instructional designer, organizational

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learning, chief learning officer, HRD manager, and strategic planning were also used to identify knowledge, skills, and capabilities.

3. In Procedure 3, a thematic analysis and frequency counts were used to create a framework for strategic competence.

Findings

Procedure 1. The official ASTD competencies for HRD practitioners (Figure 5) did not mention strategic competence or any terms related to strategic thinking. While this model does mention business and industry knowledge, it was found to advance the traditional view of HRD practice – training, education, and development – as opposed to the contemporary "strategic" view emerging in the current literature.

Thompson, in Thompson and Cole (1997), listed 32 generic strategic competencies in eight broad categories, as shown in Figure 6. This was found to be most useful in creating the proposed framework. What Thompson proposed are competencies for strategic leadership in any organizational function. His framework is applied in the HRD strategic competence framework (see Figure 7).

Procedures 2 and 3. The review of strategic HRD literature resulted in a list of knowledge areas, skills, capabilities and roles. Using thematic analysis, the list was then sorted and groupings, or broad categories, were then defined to create a preliminary framework for strategic competence in HRD (Figure 7).

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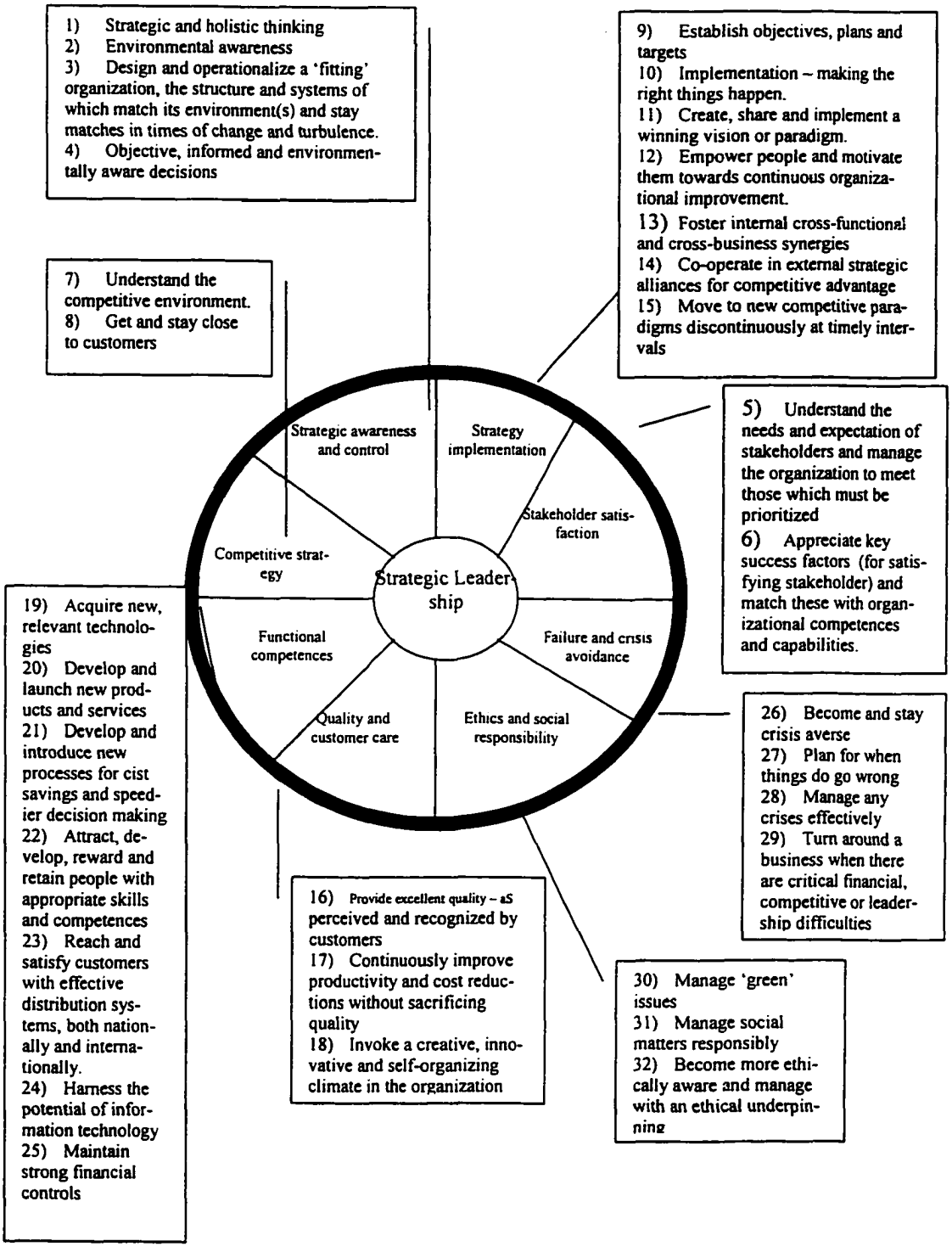

Figure 6. Thompson's strategic competence leadership framework.

Note. Adapted from "Strategic Competency," 1997, by J. Thompson & M. Cole, n.p., *Journal of Workplace Learning, 9*(5).

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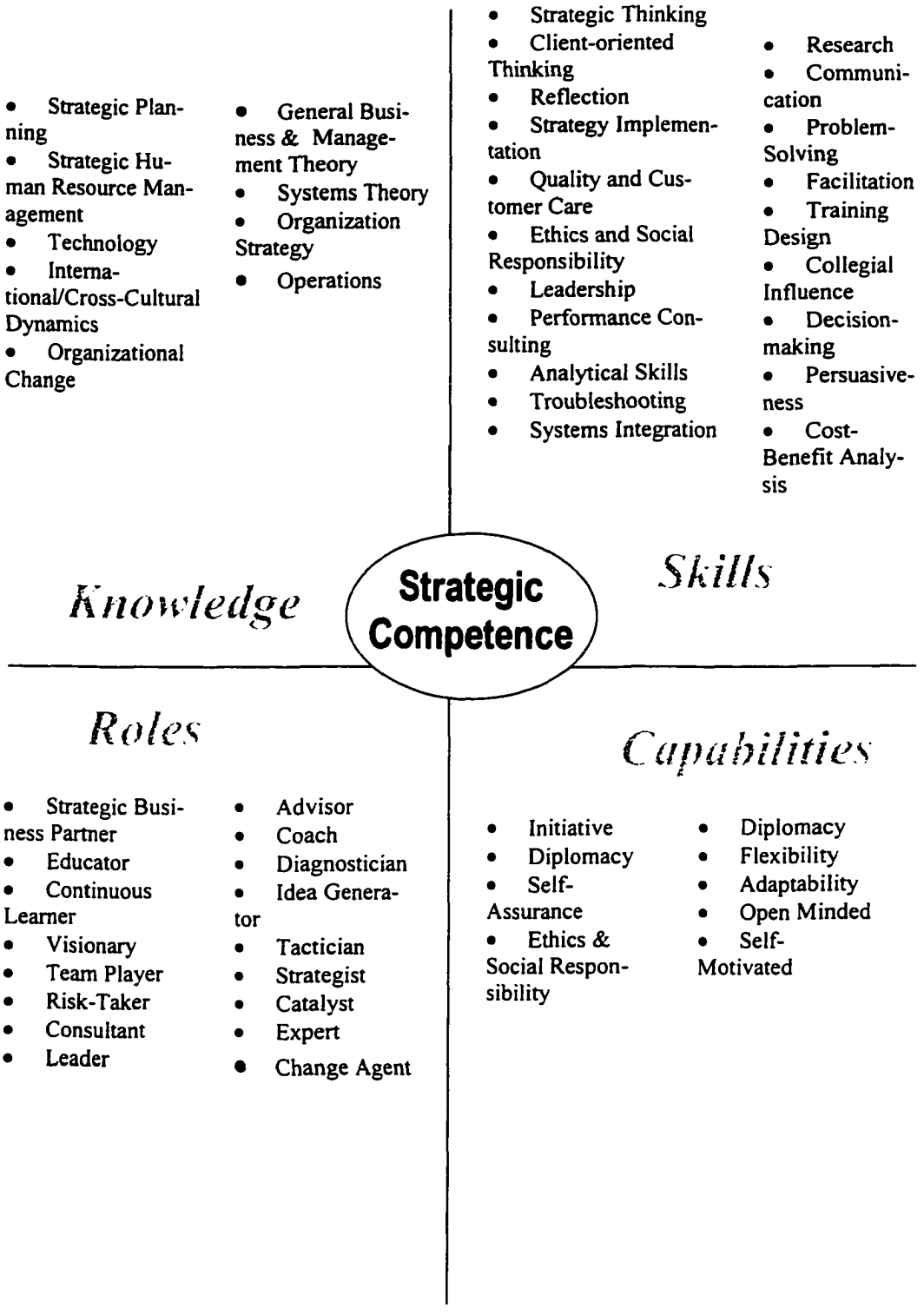

Figure 7. An HRD strategic competence framework.

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Implications for HRD Practice

This provides a beginning point for further development of an HRD strategic competency model, and a framework has been presented as a first step. Several practice implications were identified during the study.

Davis' (2001) study of HRD practitioners and HRD master's level students found that both groups rated themselves *least prepared* in the business category (ASTD). Thacker (2002) noted that the strategic focus in HRM practice requires curricula that prepare students who are capable of understanding how business operates. There is a need for greater emphasis on HRD practitioner education and professional development.

Implications for HRD education. What pedagogical approaches/techniques might enhance the development of SHRD knowledge, skills, and capabilities? HRD academics and educators must partner with practitioners to align HRD curricula to support the emerging strategic direction of practice. If new practitioners continue to be trained in the traditional school of HRD (training about training), then HRD training, education, and development will be inadequate to meet the strategic needs of organizations. This all perpetuates the perceptions of ineffective HRD practice.

This issue generated the interest in assessing the level at which strategic human resource development, and specifically strategic competencies, are addressed in HRD academic programs. This is explored in detail in Chapter IV.

Implications for practitioners. In addition to the framework of knowledge, skills, capabilities and roles/characteristics, a strategically competent HRD practitioner should be able to:

1. Reflect-in-practice and reflect-on-practice (Schon, 1983).

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2. Build partnerships with senior management.

3. Identify strategic human resource (and organizational) strengths, weaknesses, opportunities, and threats.

4. Facilitate the execution of strategies.

5. Ask strategic and diagnostic questions (Gilley & Maycunich, 1998).

6. Measure performance improvement and results (Gilley & Maycunich, 1998).

7. Recognize business priorities.

8. Filter suggestions through the prism of practical reality and operational priorities (Gilley & Maycunich, 1998, p. 39).

9. Facilitate learning acquisition and transfer (Gilley & Maycunich, 1998).

10. Identify organizational and performance needs (Gilley & Maycunich, 1998).

11. Design and develop performance interventions (Gilley & Maycunich, 1998).

12. Bring people together (Burke, 1997).

13. Interact at all levels of the organization (Burke, 1997).

14. Call for and conduct meetings, not just facilitate them (Burke, 1997).

15. Work between people and systems (Burke, 1997).

16. Model authenticity (Deaner & Miller, 1998).

In the short-term, practitioners should consider avenues for professional development. Two options are discussed here.

Professional development workshops and seminars. Both novice and seasoned HRD practitioners must revisit their knowledge, skills, and capabilities and assess the extent to which they prepared to fulfill strategic organizational roles. A few continuing education programs were identified that address strategic issues and competencies (e.g.,

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FutureWorld's™ "Strategic Thinking and Strategic Action Workshop" (2002) covers the fundamentals of strategic thinking in a global context, Penn State University (2002) offers a public seminars related to strategic organization development, the Critical Thinking Institute (2002) offers a strategic business thinking workshop, and Orion (2002) offers "Strategic Thinking in Human Resources."

Communities of practice. The concept of communities of practice (CoP) can be potentially useful in developing HRD practitioners for strategic roles (Liedtka, 1999). Lave and Wenger (1991) defined a CoP as:

> An activity system about which participants who share understandings concerning what they are doing and what that means in their lives and for their community. Thus, they are united in both action and in the meaning that that action has, both for themselves and for the larger collective. (p. 98)

CoPs are "concerned with producing both practical outcomes for customers and learning for members" (Liedtka, 1999, p. 7). Liedtka (1999) argued that CoPs can play a role in achieving and sustaining competitive advantage. CoPs are not company mandated, nor are they assigned teams or other types of formal groups. They are emergent and form out of a desire to share knowledge and expertise. I suggest that the CoP concept could be a useful, timely, and cost-effective way to increase the capacity of HRD practitioners to gain insights and knowledge about SHRD practice.

When an HRD educator or professional program leader seeks to reexamine curricula, or when a practitioner identifies a need to develop his or her own level of strategic competence, a competency model is currently not available. This chapter serves to provide a starting point.

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Areas for Further Study

Further research is needed to develop a viable strategic competency model for HRD practice. I suggest that a more in-depth study of factors associated with superior performance related to strategic competence be conducted so that job performance can be predicted and measured. Spencer and Spencer (1993) described competency modeling in detail. The shift from a strategic competency framework, as has been suggested in this chapter, to a fully operational competency model will require further research in order to determine the motives, traits, self-concept, knowledge, and skills (Spencer & Spencer, 1993) that comprise strategic competence.

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CHAPTER IV

THE SCHOLARSHIP OF DISCOVERY: IS STRATEGIC HUMAN RESOURCE DEVELOPMENT BEING TAUGHT?

In recent years, organizations have expanded their attention to the development of human resources in order to develop a competitive workforce. Van Buren and Erskine (2002) reported that direct training expenditures in the U.S. increased slightly in 2001 over 2000 in spite of unstable economic conditions. Today, training is a $19 billion industry (Galvin, 2001). The recent attention being given to managing knowledge and building learning organizations suggests that the demand for employee training and development has not diminished. In fact, it remains a key organizational strategy, given the current level of rapid technological change, globalization, restructuring, labor market shifts, and pressure to reduce costs and increase productivity. However, Gaudet and Kotrlik (1995) expressed the concern that "the training and background of those responsible for HRD is not as well defined as for some other professions. No standard qualifications or educational requirements exist for the individual with HRD responsibilities" (p. 91). Moreover, they pointed out that HRD professional are often trainers who have "worked their way up through the ranks" (Gaudet & Kotrlik, 1995, p. 92); therefore, formal HRD training, education, and development was never acquired. Dilworth and Redding (1999) called on researchers and practitioners to provide research that explains the

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"degree to which HRD practitioners are adequately "schooled" to become a valued part of the corporate team" (p. 202).

While there are ethical and professional standards for HRD practice, currently there is not a licensure or certification system like one would find for accountants or lawyers. Currently, there are limited and inconsistent guidelines for HRD education (Gaudet & Kotrlik, 1995), which led to the identified need to assess what is being taught. With the increased need for HRD professionals to assume strategic organizational roles, this study assesses what HRD undergraduate and graduate programs are teaching and seeks evidence as to the presence of curricula that supports strategic knowledge acquisition.

The chapter presents findings from a study of HRD programs currently offered at higher educations institutions in the United States in an attempt to understand two phenomena: (a) Which programs have a strategic orientation and explicitly describe their mission as advancing strategic HRD practice and (b) to what degree do the curricula of these programs offer opportunities for developing strategic competence? Recommendations for further research and future practice are made.

Methodology

This section describes the procedures used (a) to identify the institutions and HRD programs that were assessed in the study and (b) to collect and analyze the data.

Procedure 1: Sampling

The sample was defined as undergraduate and graduate HRD degree programs offered at 4-year accredited colleges and universities in the United States. Certificate

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programs and other noncredit training and development in HRD were not considered for this study due to the wide and varying approaches to this type of education. It could be argued that HRD programs in 4-year institutions are also widely diverse. However, degree-granting programs (e.g., standards and requirements) provided consistency, thereby a more reliable framework for the purposes of this study.

The sample of 41 HRD undergraduate and graduate programs was drawn from multiple electronic sources including the Academy of Human Resource Development (AHRD), the American Society for Training and Development (ASTD), the Society of Human Resource Management (SHRM), and the Organization Development Network (ODN) web sites. An initial general search for HRD academic programs using Internet search engines did not produce a comprehensive list of programs. A search on Peterson's Guide Online (2002) using keywords human resource development, human resource management, and organization development and organization studies yielded over 300 programs. To narrow the sample, four criteria were applied to each program prior to selection:

1. The program fit the definition of human resource development (while many programs use other titles to describe HRD practice, the criterion sought programs that address human and organizational training, education, and development);

2. the program was offered at a 4-year accredited college or university in the United States;

3. the program granted a bachelor's, master's, and/or doctoral degree; and

4. the program description and curricula were accessible on the World Wide Web.

Limiting this particular study to clearly identifiable HRD programs was needed in an effort to avoid confusion in the selection process. Therefore, programs that were closely

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associated with HRD (e.g., adult learning, organization behavior programs, and human resources generalist programs) were eliminated if the programs did not address the defined areas of HRD practice.

Gaudet and Kotrlik's (1995) study of HRD programs included 85 bachelor's, 108 master's, and 80 doctoral degree programs. Their sample was drawn from ASTD's *Academic Directory*, which is no longer published and no copies were available from the national organization. Given the low number of HRD programs found for the present study, I assumed that programs are either no longer offered or have not expanded their marketing efforts to include the World Wide Web.

Procedure 2: Instrumentation

Based on the list of 40 institutions that met the criteria, I designed a matrix, or template, using Microsoft Excel© spreadsheet software (see Appendix B) to capture initial institutional data (e.g., institution name, location, and department where the HRD program was housed). Then a set of four characteristics of strategic HRD programs was developed for the evaluation of each program (see Figure 8). The characteristics were based primarily on the knowledge items identified in the strategic competence framework presented in the previous chapter (refer to Chapter III, Figure 7).

Procedure 3: Data Collection and Analysis

Program information including descriptions and curricula at each institution was accessed using the World Wide Web and printed for evaluation. As each program was reviewed, a numeric code of "1" was entered in the matrix if it met the research criteria.

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Characteristic 1 *Academic Program Level* Undergraduate or Graduate
Characteristic 2 *Program Mission* Strategic HRD program mission clearly describes a strategic orientation and states its mission as advancing strategic HRD practice. Characteristics of SHRD practice as defined by Garavan (1991). See figure (left). Traditional HRD program mission is defined as a focus on the methods of training and/or organizational including adult learning and human resource development theory, instructional design and evaluation, organization development and group facilitation. See figure (right).
Characteristic 3 *Curricula* Curricular offerings that support strategic knowledge acquisition were sought based on the knowledge items outlined in Chapter III plus strategic thinking. Including: • Organization Effectiveness • Organization Development, Performance Consulting, or Consulting Skills • Organization Theory • Organization Behavior • Organization Strategy/Strategic Planning • Organization Change • Organization Culture/Climate • International/Cross-Cultural HR/HRD • General Management • General Business • General or Strategic Human Resource Management/Planning • Strategic Human Resource Development
Characteristic 4 *Academic Placement* Placement of the HRD program in the academic environment - offered in school of education, business school, or other area.

Figure 8. An evaluative HRD strategic competence framework.

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Each characteristic was tallied and frequencies were then evaluated by characteristic and then by institution (see Appendix B).

Findings

Characteristic 1: Number of HRD Programs

While the actual number of existing HRD undergraduate and graduate programs in the United States remains unclear, a total of 45 programs at 40 institutions met the four-part criteria (see Table 4). Six programs were identified as undergraduate HRD programs and 39 programs were identified as graduate HRD programs. Degree types varied among the institutions. Fifteen programs grant Master of Science degrees, eight programs grant Master of Arts degrees, and eight programs grant Master of Education degrees. Program titles also varied among the institutions including: Training and Development, Human Resource Education, Human and Organization Development, Training and Organization Development, Human Resource and Organization Development, and Organization Learning.

Characteristic 2: Strategic or Traditional HRD Mission

A thematic analysis of the 45 program descriptions resulted in 18 of the graduate programs clearly stating the word "strategic," or a closely associated term, to describe the purpose of the HRD program (Table 5). Examples of strategic program descriptions are provided in Table 6. Less than five of the programs had a clear mission statement. None of the undergraduate HRD programs met the strategic mission criteria.

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Table 4

Institutions Assessed in HRD Study

Institution	Undergraduate degree granted	Graduate degree granted
Abiline Christian University		MS – Human Resource Development[a]
Amberton University		MS – Human Resource Training
Azusa Pacific University		MA – Human & Organization Development[a]
Barry University		Ph.D. – Leadership & Human Resource Development[a]
Boston University		M.Ed. – Human Resource Education[a]
Bowie State University		MA – Human Resource Development[a]
Carlow College		MS – Professional Leadership/Training & Development[a]
Colorado State University		M.Ed. – Human Resource Development
Florida International University		MS – Human Resource Development
Friends University		MS – Human Resource Development/Organization Development[a]
George Mason University		MS – Organization Learning[a]
George Washington University		MA – Human Resource Development[a]
Georgia State University		MS – Human Resource Development
Illinois Institute of Technology		MS – Human Resource Development
Iowa State University		M.Ed. – Organization Learning & Human Resource Development

(*table continues*)

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Table 4 (continued)

Institution	Undergraduate degree granted	Graduate degree granted
James Madison University		M – Human Resource Development
Loyola University Chicago		MS – Training & Development
Marymount University		MS – Organization Learning + MA – Human Performance Systems
Northeastern Illinois University	BA – Human Resource Development	MA – Human Resource Development[a]
Oakland University	BS – Human Resource Development	M – Training & Development[a]
Penn State University		MS – Human Resource Development
Rochester Institute of Technology		M – Human Resource Development[a]
Rollins College		M – Human Resources/Human Resource Development[a]
Siena Heights University		MA – Organization Learning[a]
St. Joseph's University		M – Training and Organization Development
Suffolk University		MS – Administration of Organization Learning
Texas A&M University		MS – Executive Human Resource Development
Towson State University		MS – Human Resource Development[a]
University of Georgia		M.Ed. – Human Resource & Organization Development
University of Illinois, Urbana Champaign		M.Ed. – Human Resource Education[a]

(table continues)

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Table 4 (continued)

Institution	Undergraduate degree granted	Graduate degree granted
University of Louisville	BS – Training & Development	
University of Minnesota	BS – Human Resource Development	M.Ed., MA Ed.D. Ph.D. – Human Resource Development
University of St. Thomas		MA – Human Resource Development[a]
University of Tennessee	BS – Human Resource Development	MS, Ph.D. – Human Resource Development
University of Texas, Austin		MA – Human Resource Development Learning
University of Wisconsin, Stout		MS – Training & development
Vanderbilt University	BS – Human & Organization Development	M.Ed., Ed.D. – Human Resource Development
Western Carolina University		MS – Human Resource Development
Western Maryland College		MS – Human Resource Development
Xavier University		M.Ed. – Executive Human Resource Development[a]

[a]Strategic HRD program mission clearly stated.

Characteristic 3: Curricula

Rankings of the institutions by number of strategic courses offered are provided in Table 6. Only 10 of the 45 programs offered at least 5 of the 12 strategic course criteria used in the study.

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Table 5

Examples of HRD "Strategic" Program Mission Statements

Institution	Program mission
Abilene Christian University	"The Master of Science degree in organizational and human resource development is a 36-hour program which focuses on organizational systems, cultural systems and human systems issues as they apply toward leading, administrating and managing organizations."
Barry University	"This program prepares you to help people and organizations adapt to continuous change; increase the learning capacity of individuals, teams and organizations to optimize growth and effectiveness; and to enhance the relationships between people, learning and organizations by using systematic change processes."
Boston University	Students develop knowledge and capacities in planning, problem-solving, designing and evaluating instruction, and in analyzing and influencing organizational behavior, policy, and change.
Friends University	Utilizing the consultant-facilitator role, and the theory and technology of applied behavioral science related to planned change, our students provide the leadership tools to improve an organization's visioning, empowerment, learning and problem-solving process. . Our HRD students work with leaders and group to diagnose strengths and areas for improvement and jointly develop and deploy action plans for increasing organizational effectiveness and individual development.
Northeastern Illinois University	"The Master of Arts Degree in HRD provides graduates with the skills necessary to design adult learning, assume a management role in its development and delivery, and provide creative vision to the performance goals of organizations in both public and private sectors."
Rollins College	"Students acquire knowledge and skills in the areas of organizational strategy, training and development, selection and retention, organization change, employment law, and human resource management. The MHR program also will enable participants to: Identify current human resource problems and formulate plans for their improvement; Recognize how future trends can impact their organizations; Apply state-of-the art techniques and strategies in human resource management. Become strategic business partners in their organizations."

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Table 6

Ranking of HRD Programs by Number of Strategic Courses

Ranking	Number of courses	Institution
1	8	Western Maryland College
2	7	Azusa Pacific University
3	6	U. of Illinois - Urbana Champaign
4	6	U. of St. Thomas
5	6	U. of Georgia
6	5	Barry University
7	5	Oakland University
8	5	Iowa State University
9	5	Loyola University Chicago
10	5	Marymount University
11	5	U. of Texas - Austin
12	5	U. of Wisconsin - Stout
13	4	George Washington University.
14	4	Rochester Institute of Technology
15	4	Siena Heights University
16	4	Towson State University
17	3	Friends University
18	3	Northeastern Illinois University
19	3	Xavier University (OH)
20	3	Colorado State University
21	3	Vanderbilt University
22	2	Abiline Christian University
23	2	Boston University
24	2	Carlow College
25	2	George Mason University
26	2	Rollins College
27	2	Amberton University
28	2	St. Joseph's University
29	2	U. of Minnesota
30	2	Western Carolina University.
31	1	Bowie State University
32	1	Penn State University
33	1	Suffolk University
34	1	Texas A&M University
35	1	U. of Louisville
36	0	Florida International University.
37	0	Georgia State University.
38	0	Illinois Institute of Technology
39	0	James Madison University.
40	0	U. of Tennessee

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Characteristic 4: Academic Placement of HRD Programs

Twenty- two of the HRD programs are offered in Schools or Colleges of Education, 7 programs are offered in Schools of Business or Management, and 16 programs are offered in other areas including Schools of Public Affairs/Policy and Schools of Graduate or Professional Studies (see Table 7).

Top Schools for Strategic HRD

Eighteen of the 45 total programs were found to describe their purpose using strategic terms and offered courses that could be applied in the acquisition of strategic knowledge and skills, or the development of strategic capabilities (see Table 9).

Limitations

Several limitations in this study should be noted before further discussion of the findings. First, only degree-granting programs that were accessible on the World Wide Web were studied. It is likely that other HRD programs have strategic mission statements or offer courses for strategic knowledge acquisition. Second, the interpretation of statement and course offerings was entirely subjective and greatly limited given the amount of available information provided in the type of medium used for data collection. It was often difficult to decipher which courses were required and which were electives. In several cases, strategic courses were offered as electives, which means that students may or may not include such courses in their programs of study. Therefore, one cannot assume that strategic knowledge, skills, or capabilities were acquired. Third, the study was systematic insofar as the evaluations of the programs are representations of what

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Table 7

Ranked HRD Programs with Strategic HRD Mission and Courses

Rank	Institution	Organizational Effectiveness	Organization Development/ Consulting	Organization Theory	Organization Behavior	Organization Strategy/Strategic Planning	Organization Change	Organization Climate/ Culture	International HRD/ Global Workforce Diversity	Mgmt/ Business	Strategic or General HRM/ HRP	Training or Program Evaluation	Strategic HRD
1	Azusa Pacific		x		x	x	x		x	x	x		
2	U. of Illinois – Urbana Champaign		x			x			x	x	x		x
3	U. of St. Thomas		x	x	x		x				x	x	
4	Barry		x		x		x		x			x	
5	Oakland		x				x	x	x			x	
6	George Washington		x							x		x	x
7	Rochester Institute		x			x					x	x	
8	Siena Heights		x		x	x		x					
9	Towson State	x			x						x		
10	Friends		x		x		x						
11	Northeastern Illinois		x	x								x	
12	Xavier	x			x							x	
13	Abiline Christian			x	x								
14	Boston				x								
15	Carlow College			x						x			
16	George Mason			x	x								
17	Rollins College		x								x		
18	Bowie State		x										

Table 8

Academic Placement of HRD Programs

Placement	
School of Education	
Barry University (4)	Suffolk University
Boston University (14)	Texas A&M University
Colorado State University	Towson State University (9)
Florida International University	U. of Louisville
George Washington University (6)	U. of Minnesota
Iowa State University	U. of St. Thomas (3)
James Madison University	U. of Texas - Austin
Northeastern Illinois University (11)	Vanderbilt University
Oakland University (5)	Western Carolina University
Penn State University	
School of Business of Management	
Amberton University	
Azusa Pacific University (1)	
Iowa State University	
Marymount University	
U. of Texas – Austin	
Western Maryland College	
Xavier University (OH) (12)	
Other	
Abiline Christian University (13)	Loyola University Chicago
Amberton University	Rochester Institute of Tech. (7)
Bowie State University (18)	Rollins College (17)
Carlow College (15)	Siena Heights University (8)
Friends University (10)	St. Joseph's University
George Mason University (16)	U. of Illinois - Urbana Champagne (2)
Georgia State University	U. of Tennessee
Illinois Institute of Technology	

Note. Numbers in parentheses denote ranking shown in Table 7.

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was found on the World Wide Web. The systematic analysis did not extend to the course catalogs or course syllabi. Therefore, the sampling is limited to online data sources. Fourth, given that there are no common standards of HRD education, the framework used to evaluate the programs should be viewed as tentative.

Discussion

Despite the limitations, the study does suggest that emphasis on SHRD and basic organizational strategy are not adequately addressed in undergraduate or graduate HRD education. Moreover, there appear to be inconsistencies in HRD education standards, which supports Gaudet and Kotrlik's (1995) observation of the discontinuity of HRD preparation. Several themes emerged from the study. First, when applying the "strategic mission" criteria to the programs, only 18 out of 40 programs resulted. For the student seeking a cutting edge (strategic) HRD program, or an employer seeking to recruit graduates with strategic knowledge and skills, there are limited choices. Second, most of the programs that were found to be strategic according to their mission, offered few courses that supported the strategic knowledge gain. On the other hand, there were a few cases where programs with traditional missions were found to offer some strategic-oriented courses. Third, the placement of HRD programs in the academic structure is varied. Half of the HRD programs were offered in Schools of Education while Schools of Business or Graduate/Professional Studies offered the other half of the programs sampled. This was not at all surprising given the multidisciplinary nature of HRD. One interesting finding was that the top ranked institution for both strategic mission and courses (Azuza Pacific) is offered in a School of Business. It makes sense that the program requirements and

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course offerings would offer an opportunity for strategic knowledge gain. Finally, several strategic HRD program exemplars were found.

The Azuza Pacific program is competency-driven and requires courses including Management for the Worldwide Organization, Leadership and Managerial Ethics, Strategy and Planning, and Organizational Design. Boston University's program is also competency-driven with an emphasis on

> reflection, thinking strategically about business problems and solutions, collaborating with people with diverse work situations, understanding the functional theories of human-performance technology, analyzing work performance, organizational structures, and organizational processes, designing and implementing business solutions; managing people, processes, and projects; and assessing the effectiveness of business interventions. (Boston University, 2002, n.p.)

The University of Illinois, Urbana-Champaign recently reintroduced its program with a global emphasis. The global HRD course of study includes: Training and Development for Business and Industry; Business Principles for HRD Professionals; Project Management; and Strategic Planning, Quality, and Process Improvement. However, no course offerings related to international business or globalization, or even cross-cultural understanding, were found.

Areas for Further Study

Further research is needed to expand on the research findings presented. Given the limitations of the present study, a deeper inquiry into HRD programs using standard assessment criteria, and in cooperation with the institutions, would be useful to better understand program requirements and outcomes across programs. A comparative study of industry expectations and academic program offerings in the United States, or a benchmarking study, could prove useful for improvement in academic preparation programs as

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well as continuing education programs. A survey of HRD and OD graduates and their perceived level of strategic competence is also recommended.

Recommendations for Education and Professional Development

Improving HRD Education

The Business-Higher Education Forum, for example, reports several recommendations related to industry needs of the future workforce and how business and industry could work collaboratively to generate change (Davis, 2001). One of the recommendations suggested that "business and higher education should develop a collaborative process for restructuring curricula and teaching methods, thus allowing them to keep pace with the changing global economy" (p. 13) and "provide more opportunities for college students to take theoretical concepts and apply them to 'real' learning experiences" (Davis, 2001, p. 13).

It is vital for students to possess the skills necessary to cope with and manage the advanced information technology in an increasingly global environment. Retooling is needed – quickly. HRD curricula need to be reexamined to ensure the inclusion of strategic competence. As previously suggested, collaboration between HRD educators and practitioners in the revision of HRD curricula is viable and needed (Thacker, 2002). Thacker's (2002) case study on the revision of HRM curricula is a useful model, which emphasizes the following:

1. Practitioner input;
2. Adoption of creative approaches to student learning;
3. Development of specific measurable outcomes;
4. Observable demonstrations of the learning of those outcomes;
5. Creation of projects grounded in real-world business problems. (p. 31)

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Business school models may be useful in this process because MBA programs explicitly address the global competitive, cultural, and economic factors that shape the environment in which firms operate. Or, in the case of two institutions reviewed in this study, partnerships between business and HRD programs should be explored. As a starting point, programs should integrate strategic thinking skills throughout current curricula. An example of how this was done in one undergraduate course is addressed in Chapter V.

The academic placement of HRD programs was an interesting finding. The fact that HRD programs exist in numerous locales in the academy underscores the dilemma mentioned previously concerning the multidisciplinary nature of HRD practice. This presents a unique opportunity for HRD practice because it provides a broader context for cross course listings, enabling HRD educators to provide a more holistic curriculum. Clearly, HRD programs should not take on a business identity. However, students would benefit from shared resources and expertise that would be available in a business-education school partnership.

Sunoo (1999a) offers another perspective on HRD education. She studied HR practitioner profiles and how they boosted their strategic competency. It was concluded that practitioners who are committed long-term and are interested in chief learning officer or chief strategy officer roles may want to consider pursuing a Master of Business Administration degree. One practitioner commented, "If you want to be taken seriously by senior management, then you must play at their level" (Sunoo, 1999b, p. 81).

Improving Professional Development

In the previous chapter, two recommendations were made to improve professional development as it relates to strategic competence: (a) increase availability of workshops

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and seminars that address strategic themes in HRD and (b) create communities of practice as a strategy for building shared knowledge among practitioners.

J. Walker (1990) suggested that strategic capabilities be developed within the organization through in-house training. He further suggested the involvement of the CEO in developing practitioners for strategic roles. In this scenario, competencies can be honed and expanded through individual and group learning. This is viewed as a viable option in that it combines the structure of a workshop format with elements of the CoP, thereby creating a strategic learning community.

Conclusion

No systematic study of HRD undergraduate and graduate education was found in the HRD literature, prompting the need for the present study. This study describes the state of HRD education as it relates to the question: Is SHRD being taught? It can be reasonably concluded that SHRD not being taught, or at least programs are not explicit in describing their programs as such. HRD education is inconsistent and has not kept pace with the changing needs of contemporary organizations. Given that HRD practitioners are being called on to fulfill strategic and other roles unlike traditional training, there is a need for improvement in HRD education.

Practitioners and educators should work in partnership to improve HRD education, as described by Thacker (2002), by first assessing what industry needs and then by developing or changing curricula to meet those needs. It is recommended that HRD programs become mission-driven and be revised or built to reflect the needs of changing organizations.

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CHAPTER V

THE SCHOLARSHIP OF TEACHING: DEVELOPING STRATEGIC THINKING SKILLS – HOW ONE UNDERGRADUATE COURSE IS DESIGNED AND FACILITATED

> One of the great academic challenges for management instructors is developing interesting and educational forums to help students learn and integrate abstract concepts. (Barbuto, 2000, p. 288)
>
> People who are successful strategists have distinct qualities and act in distinct ways. (Linkow, 1999, p. 1)

Few exemplars in teaching practice were found that focus on strategic competence in general, and specifically, the development of strategic thinking skills in undergraduate or graduate HRD education. Strategic thinking, as defined in the previous chapter, is "the ability to understand rapidly changing environmental trends, market opportunities, competitive threats, and strengths and weaknesses of their own organizations, to identify the optimum strategic response" (Spencer & McClelland, 1994, p. 35).

Movement toward innovation in undergraduate management education is evident (Bilimoria, 1998), as higher education institutions implement "mission-driven curricular innovations" (p. 365). However, there is a gap in the HRD literature related to teaching and learning innovations that build strategic competence. Therefore, this chapter relies on teaching and learning models advanced in the management literature.

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A trend noted in the literature is the attention being given to integrative experience such as "real world" application. The question that Bilimoria (1998) posed is, "How can integrative experiences be successfully woven into the curriculum?" (p. 366). What teaching and learning strategies might aid students' development of strategic competence? This chapter describes an effort to revise an undergraduate organization theory course to emphasize strategic thinking skills and practice. The course emphasizes the integration of strategic thinking skills to help students to perform in strategic organizational roles. Such an approach has not been considered in the current HRD literature to date.

Background

There is evidence of the need for innovation in management teaching and learning from an academic perspective, as was previously mentioned, and from an industry perspective. Recent innovations in management education have been chronicled, for example, in the *Journal of Management Education*. Bilimoria (1998) wrote in her editorial introducing a special issue on this topic:

> Contemporary innovations include enhanced emphases on managerial skills assessment and development; the technological capability of students; newer communication methods and infrastructures for teaching diverse and dispersed students; increased real-world immersion experiences built into program requirements; and the cross-disciplinary integration of management subject matter. (p. 565)

As concluded in the previous chapter, no HRD curricula were found that emphasize strategic thinking or teach students to link theory and practice in ways that result in the development of strategic competence. In previous chapters, the need for strategic competence has been addressed at length. This chapter has two underlying themes. One

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theme addresses one aspect of strategic competence and shows how strategic thinking was integrated in an undergraduate organization theory course. The second theme is the incorporation of "teacher as learner" reflections to demonstrate how reflective practice can be used for professional growth.

Organization of the Chapter

It is believed that in order to develop strategic thinking skills and build strategic competence, students need to make the connection between theory and practice and immediately apply their learning to real world situations. Therefore, this chapter has three purposes. First, a basic course description will be provided to orient the reader to the layout of the organization theory course. Second, this study takes to heart Bilimoria's (2000) assertion that management educators need to reflect on their own learning and assess their own readiness to engage students in studying organizations in a complex world. Some reflective notes are provided to orient the reader to the background and experience of the instructor. Third, several of the teaching approaches and learning activities will be described to demonstrate how strategic thinking was integrated in the course.

Course Introduction

Advanced Organizational Theory (AOT) is a core course of an undergraduate human and organizational development program that, in this particular case, is taught from a management perspective. Most of the students enrolled are juniors and seniors majoring in human and organization development (HOD) with a concentration in leadership and organizational effectiveness. Typically, four or five sections are taught each semester. The college catalogue describes this course as:

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> A comprehensive study of the evolution and current status of the theories and applied research in organizational design, organizational behavior and organizational effectiveness. Using a systems theory perspective, emphasis is placed on organizational development processes and techniques including matrix/self-directed work teams, job/task redesign, visioning, strategic planning, empowerment, continuous quality improvement, learning organizations, conflict resolution, and risk management. Simulated organizational interventions, planned change strategies and systemic assessments will be designed and evaluated. Student's skills in problem identification, research, planning, assessment, oral presentation and professional writing will be reinforced. (Peabody College of Vanderbilt University, 2002)

Reflections on Teaching and Practice

> As management educators, we must assess our readiness "to engage in a management education world characterized by speed, value creation, visionary leadership, constant change, diversity, boundarylessness, e-commerce, knowledge leadership, and the other so-called 21st-century management constructs whose mantras we spout so readily to our students." (Bilimoria, 2000, p. 302)

What Do I Teach?

I was first asked to teach AOT in 1999 as part of my graduate teaching assistant duties while completing doctoral coursework. The first semester was rather unsettling due to my lack of formal college teaching experience. I decided to "go with the flow" that first semester. Two factors helped me to design the course.

First, I am very interested in the subject of organization theory. You might say that I have a passion for it. In my grade school years, my father was in the process of earning an MBA. We often talked about pioneers of organization theory like Frederick Taylor, Mary Parker Follett, and Peter Drucker (and we still do today). My father made their contributions sound interesting and he talked about them like theoretical giants, just like one would name sports legends. I have always said that if there were organization theorist trading cards, you can bet that he would have a set.

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Second, I deliberately framed the course based on what I, as a human resource and organization development practitioner, practice everyday. I thought about what helped me to establish credibility with my peers and superiors in my corporate work setting, and I soon realized that much of what I apply in the workplace did not mirror what I was expected the students to learn. I decided that it was important to teach what I know – the rough terrain and complexities of being a change agent in a fast-paced and competitive organizational environment.

The Students

During the first course in 1999, I quickly learned that the students were for the most part interesting, bright, articulate, and, in a few cases, experienced in the ways of the real world. Judging by the students' evaluation of the course at the end of my first semester of teaching, their interest in taking an organization theory course was, not surprisingly, quite low. Nevertheless, I was intrigued by the students' work-related experiences. Many had completed internships at top consulting firms, at Madison Avenue advertising firms, and in major financial institutions. I never will forget the student who worked at an investment firm in Hong Kong the previous summer. He told the story – not in a boastful way – about what he had learned. He said, "Oh, I just shadowed the VP around and when he was busy I hung around with the brokers and learned how to trade stocks." I asked, "Well, how'd you do? What did you learn?" He answered, "I made an undisclosed amount of money!" Sometimes I think teachers underestimate the value of what students already know.

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Constructivist Pedagogy

I found it helpful to learn about constructivist pedagogy, which was applied in the redesign and facilitation of the AOT course. According to Billett (1996), constructivism assumes that the learner does not passively absorb knowledge but actively constructs knowledge in relation to their experience. Kerka (1997) explained, "Teachers facilitate learning by encouraging active inquiry, guiding learners to question their tacit assumptions, and coaching them in the construction process" (p. 3). The AOT course assumes, based on the course prerequisites, that students enter the learning environment with general knowledge of organizational concepts including: systems thinking, group dynamics, and teamwork. In the third phase of the course, I shift from an instructor role to a facilitator/coach role and engage the students in the application of organizational analysis theory to projects of their choosing. This third phase of the course is described later in the chapter.

Instructor as Facilitator

One of the first decisions I made was to be clear about my role. Given that I facilitate groups in a variety of settings as part of my job and in community activities from day to day, it made sense that I would adopt the same role for the course. Role clarification created some parameters for the course design because when I am in my facilitator role, my job is to organize a climate so that the group can be productive, foster interaction, learning and dialogue, keep the group on track, model appropriate behaviors for group interaction and leadership, and to design a process to accomplish a specific objective. It freed me from focusing on my role as a teacher.

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My 15 years of experience as an organizational leader, project manager, internal consultant, and now external consultant provided expert knowledge from a practical perspective. What I did not have was an expansive knowledge base about organization theory, which was unnerving given that I was now instructing a course on the subject.

I entered my teaching role with a strong sense of responsibility and the need to achieve a high level of credibility with the students. It took a couple of semesters to acquire the level of knowledge that made me comfortable enough to impart theoretical knowledge to a group of students, but this didactic approach did not fit my style – and the students noticed. They let me know that what they valued most about the course was my "real world" experience and the ways I challenged them from that perspective. That became more and more evident as their questions focused more on my consulting and other work experiences than on theory. I also found myself responding in discussions saying, "Yes, that may work in theory, but what happens when your boss comes to you and says . . . . ?"

By the third semester of teaching AOT, I had changed the course and decided to structure only half of the course. I discovered that the students were getting more out of my failures and successes as a practitioner, which is based on analyzing and responding to strategic challenges in the organization. This requires a different kind of thinking than that which is critical or theoretical thinking. I will use the analogy of a goalie in the game of hockey. When the opposing team (let us say the forces in an organization's environment including competition, political, social, or economic) is moving fast and ready to impact your game, my job is to be equipped and ready to respond – sometimes in a split second, relying on my knowledge of the "game" and ability to think strategically.

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Realizing, too, that most of the students revealed that they were not necessarily going into the HRD field (hence the need for strategic thinking skills), I changed my mindset from teaching to facilitation. Relying on my strategic thinking abilities led me to restructure the course and allow myself, and the students, to learn by doing, with an emphasis on linking theory and practice.

The Course Design

Course Description

The AOT course design is firmly rooted in the open systems view that the environment in which organizations operate is constantly changing. The syllabus (see Appendix C) includes the following description:

> This course is designed to prepare students to comprehend, analyze, explain and respond to organizational dynamics at the "macro" level and to become strategic thinkers in organizations. The course is intended to achieve this by developing a systematic understanding of the complexities of organizations in modern society. (Course Syllabus, 2002)

Course Goal and Objectives

> Specifically, the goal is for each student to develop knowledge and skills to be able to make significant contributions in organizational settings in the future. To achieve this, the course discussions and assignments are organized so that students will develop in the following areas: Discovery (conducting research, making sense of it and then reporting results); Application (demonstrating that students can explain and respond to organizational challenges by applying theory to real situations); Teaching (sharing knowledge and engaging others in improving their understanding of organization theory); and Integration (demonstrating comprehension of course material).
>
> Students are expected to be able to:
>
> - Identify and explain the nature of organization theory (Discovery);
> - Research and report on a trend in the world of organizations (Discovery);
> - Conduct an organizational analysis using theory or tools (Application & Integration);

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- Demonstrate strategic thinking skills by preparing a strategic plan (Application); and
- Present (orally) coherent analyses and conclusions (Teaching).

Students apply and further develop skills in the following areas:

- Planning
- Teamwork
- Communication
- Consensus-Building
- Presentations
- Critical Thinking
- Strategic Thinking
- Research & Analysis
- Professional Writing

Course Framework

The 14-week course is divided into three phases that make up the Organization Theory Learning System, as shown in Figure 9. The first phase of the course (approximately 2 weeks) focuses on course orientation activities and provides a broad overview of organizational thought. The second phase of the course (approximately 3 weeks) focuses on organizational analysis and several constructs that are applied in strategic planning or in developing organization effectiveness strategies. The third and final phase of the course is devoted to what Watson and Temkin (2000) referred to as "just-in-time (JIT)" teaching. In this phase, the course focuses on the application of theory to a "real world" class project. A description of each phase of the course and examples of teaching and learning activities are provided later in the chapter.

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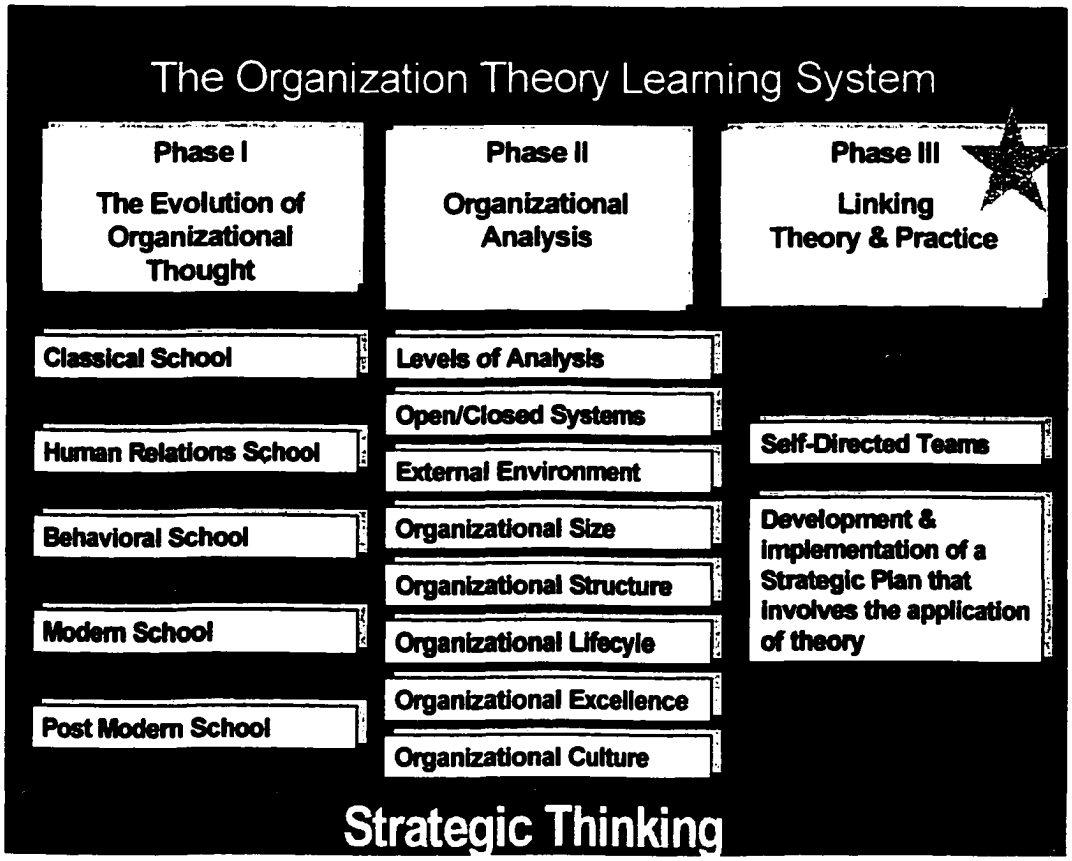

Figure 9. Organization theory learning system phases.

Phase One: Course Orientation and the Evolution of Organizational Thought

Course Orientation

The course opens with an orientation during which time the students are given an overview of the course and are informed about their role in making it a success. The climate for the course is described as being what they might experience in a management training and development program in a work setting. The mission, goals, and desired skills are explained. The major concepts to be studied in the course are described, with

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particular attention given to making a case for why the study of organization theory is valuable and presenting the concept of strategic thinking.

First Assignment: Course Preparation

Just as they would encounter in a real training situation, the students are asked to complete a student profile to assess their knowledge, interests, learning needs, and expectations for the course. They submit a resume and sign a contract indicating that they have read and understand the terms and conditions of their role and the expectations of the course.

Examples of Student Expectations

1. "To learn how real organizations operate."
2. "To provide a 'different' experience from traditional course."
3. "To improve my presentation skills."
4. "To gain real work experience."
5. "To learn how to be an effective member of an organization."
6. "To learn how to navigate the obstacles of organizations as an African American man."
7. "To apply theory to the real world."

Examples of Student Aspirations

1. "To be a successful senior official in an international corporation or run my own business."
2. "To work in an HR role in a nonprofit setting."

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3. "To become a magazine editor."

4. "To go into marketing."

Small Group Exercise: OT in the "Real World"

During the second week of the course, the students are given an in-class, small-group exercise designed to introduce them to the concept of strategic thinking. The learning goals are: (a) to experience how to identify variables that lead to problem formulation (being able to define and articulate a problem), and (b) to get oriented to one another in preparation for future group work. The learning objectives are: (a) to break out of the traditional course mode and work toward an interactive course climate; (b) to promote participation, camaraderie, and discussion; and (c) to get a sense of how OT is applied to real situations.

Phase Two

By the third week of the course, the students have been exposed to the basic precepts of organization theory. In Phase Two, the focus of the course turns to organizational analysis when students are asked to think about theory and various frameworks like tools in a tool kit. The more they know about the tools the more they will be able to recognize when it is appropriate to apply them. Preparing for a job interview is an example used to make the point. Most students do their homework when preparing for an interview: finding out what the organization does, where they are located, and so forth. A student with a strategic "sense" will not only know these basics, but can quickly apply theoretical "tools" to get a sense of the big picture and know the types of questions he or she could ask to get beyond surface-level questions. To really know an organization is to

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know its systems and subsystems, how it interacts with its external environment, what forces impact its current state, and how it is structured.

In Class Video Exercise: The Real West Wing

Another exercise designed to development strategic thinking skills is the video exercise called The Real West Wing. The learning objective is to apply (Practice) Daft's (2001) organizational analysis model that identifies the structural and contextual dimensions of organizations.

In Class Exercise: "Project Greenlight"

Project Greenlight is an ideal laboratory for observing group and organizational dynamics in the world of filmmaking. *Project Greenlight* is "a 13-episode HBO documentary series that chronicles the making of an independent feature film" (*Project Greenlight*, 2002). Episodes are viewed in class throughout the semester. In the current world of "reality TV" it was not surprising to find that the students engaged in the program. *Project Greenlight* is a feature film-length case study that provides poignant scenes that depict the trials and success of a completing a major project. Organizational concepts addressed include: organization structure, group dynamics, power and influence, budget constraints, and organization culture in a "real world" setting. The program is ideal because it features a leader (director) struggling to make his first film and a diverse group of people working in teams on a movie set, to which most undergraduate students could relate.

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Second Assignment: Trend Analysis

The ability to scan the environment for critical information is an essential strategic thinking skill (Thompson & Cole, 1997). This assignment requires students to read a wide variety of publications of their choosing, and then select what they believe is an interesting trend facing organizations. In my experience as an internal and external consultant, clients often request briefings on issues that could be useful in designing a strategy or in solving a problem. This type of information is often gathered for benchmarking to identify best organizational practices. What may be slightly different about this assignment compared to other types of reports is that the students have only one week to complete it. This provides a real-world application because it requires them to quickly scan and summarize material. Details on this assignment are provided in Appendix C.

Third Assignment: Strategic Plan

Several attempts had been made in this course to engage students in learning about strategic planning. The most challenging aspect of this module was helping the students learn the difference between a vision and a mission. Time and other constraints would not allow the development of a strategic plan for a real organization. The students develop a strategic plan for Me, Inc. (themselves). It was designed to make the planning process relevant, thereby enhancing the student's learning about strategic planning concepts. Details of this assignment are provided in Appendix C.

Phase Three

The Class Project

> This week, be sure to bring your creative hats to class. We'll be going through several activities to dream up our project. Be sure you have read the "What

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> Strategic Thinkers Do" article. This is where YOU take leadership and ownership of the class, so I'm looking forward to learning from you and facilitating your application of the concepts you've been introduced to in class. (Email to class)

The class project is the most exciting aspect of the course, but also challenging in terms of the coordination required to make it meaningful and relevant. At this point in the course I step aside as an instructor and take on a coaching role. Just before the mid-semester break, the students are asked to develop their class project.

They are intentionally given loose parameters, which creates a great deal of frustration for them because of the lack of structure. I usually send an email to the class to help the get focused.

> Class - The third phase of 2720 is focused on a project or several smaller projects that allow you to apply the major concepts that you have been exposed to in the course. We know that great things happen (personally and in organizations) when there is a clear vision and mission in place. The purpose of this discussion thread is to generate thoughts about the capstone project and what it COULD be. At this point, I encourage you to NOT think about what is practical or doable in the limits of the course, but to just consider possibilities.
>
> Post your thoughts on the following questions. You need not answer them all at once. Come back to the thread a few times over the next week and add your ideas based on what has been posted.
>
> What do you want to get out of the project experience?
>
> How do you think the project might benefit you now and in the future?
>
> What do you want to learn?
>
> What is the one thing that could happen with this project that would be beyond your wildest dreams?

The project can involve the whole class, or several small group projects can be done. In their frustration, the students soon figure out that without a solid plan and clear strategies, the project remains difficult. The only requirement is that the students must demonstrate their knowledge and skills in organization theory and organizational

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analysis. The rest is up to them. An example of one class planning process is provided in Appendix C.

Every project has been different, but the outcomes have been the same. The students learn the value of developing a plan and executing it, they gain a sense of accomplishment, and they apply their knowledge in a real world setting. An example of a complete class project is provided in Appendix C.

Course Reactions and Reflections

Effective facilitators are constantly in tune with groups to ensure an optimum climate for learning and productivity. Throughout the AOT course, I facilitate discussions with the students about the ways in which the course is and is not working. This open discussion method is essential in encouraging the students to feel a sense of ownership about their learning and to allow them an opportunity to practice giving feedback to someone in an authoritative role. The final exercise used in this course is a reflective essay. The students are asked to respond to the following question:

> A semester later . . . we are having a cup of coffee in the Hill Center and talking informally about your experience in Advanced Organization Theory. You describe what stood out for you in terms of what you learned in the course. You tell me what you would do to enhance the course in the future (framework, content, activities, readings, materials)? Finally, you describe the advice you would give a student who takes this course in the future.

Following are excerpts from reactions written by the students, along with my own reflections on the course experience.

> I did not know what to expect when I signed up for the course. I thought that Advanced Organization Theory sounded like all of my other HOD classes, but I hoped it would be interesting and that I would learn things that I could apply to any line of work . . . I thought that the SWOT analysis was the best tool I learned all semester . . . Another important aspect of the class was the in depth discussion

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> of the importance of an organization's culture, especially when implementing new programs or merging two companies. (Student 1)
>
> One thing I really loved was how much responsibility was placed on the students. You were our boss and we were the employees. We had a job to do, deadlines to make, and problems to solve. This class had a business-like environment that better prepared me for future jobs. This was the first class that taught me that you do not just read off a PowerPoint presentation and expect to get your point across. (Student 2)

One of the challenges in teaching undergraduate organization theory is the fact that the vast majority of the students have little work experience. Finding activities that are meaningful and promote learning are often difficult to construct. This particular semester, I shifted away from teaching theory and engaged the students in learning how to use planning and analysis tools, for example mind mapping, scenario planning, and SWOT (strengths, weaknesses, opportunities, and threats) analysis.

> We had an extraordinary opportunity to apply theory to up-to-the-minute events, and I feel that this is important because it helps the students to stay connected to the outside world. . . . The test where we got to apply concepts to different situations was very helpful in putting what I learned in place in the real world. (Student 3)

Memorization of theory and tools is not a useful learning strategy in AOT. Quiz and final examination questions are drawn from business news articles that were typically published during the week of the test. This reinforces the "just-in-time" teaching approach and forces the students to apply their strategic thinking skills to real time situations. Following is sample examination question:

> On December 5, 2001, Hospitals X and Y will merge their primary care clinics and operate one comprehensive clinic, which will be operated by Hospital X. The CEO of Hospital X says that a major problem in the merger is the conflict between how we do things at X (we are a community hospital) and how things are done at Y (a teaching hospital).

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1. Since Hospital X is absorbing Hospital Y, (doctors, nurses, residents, etc.), what response would you give the CEO of Hospital X that might help her make sense of the challenge?

2. What strategies would you recommend to bring these two cultures together?

Some students found opportunities to immediately apply their learning.

> Changing the fundamentals of an organization is something that I have been trying to do [in a student organization]. Once the course got underway, I decided to take another stab at it. Now I work toward making small changes and eventually got the Board to accept a new proposal that didn't change everything so radically. (Student 4)

> After learning much information I can go into almost any organizational setting to evaluate, consult and correct organizational and behavioral situations. (Student 5)

As mentioned earlier, one of my concerns about teaching undergraduate organization theory is the student's lack of work experience. I often hear them talk about organizational situations or what they would do in situation, and their responses have a naïve quality to them that concerns me. I try as much as possible to paint a realistic picture of what happens in real organizational work. In internal and external consulting, most of the time there are no quick fixes. While I am always pleased to see when a student demonstrates confidence in their abilities, I find myself reminding them that being able to talk about a theory you would apply in a situation is different from implementing it. You have to be able to produce results because that is what builds credibility.

Student Suggestions for Improvement

Students offered constructive feedback on ways to improve the AOT course experience. In the final course evaluation, I ask the students to list the things that they would want more of, or less of in the course. Examples from a recent semester include:

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1. More opportunities to give presentations
2. Less time on evolution of organization thought and
3. More opportunities to demonstrate competence.
4. More speakers. "I loved when the professor deviated from the norm and invited guest speakers to the class."
5. Less use of the current textbook. A student writes, "Ditch the Textbook. The material in the book was too heavy to be of any help. It was so confusing that I stopped reading it and did just as well on the assignments."
6. More examples of consulting projects.
7. More small group activities "to encourage more participation throughout the class."
8. More opportunities to get out and visit organizations. "We attempted to do this but due to the time of the course (mid-morning), we could not accommodate everyone's schedule."

Discussion

Trade-offs were frequently considered in revising this course. First, there is the trade-off between providing a thorough treatment of organizational theory and opting for the applied approach. Having tried both, the applied approach has proven to be more effective. Second, there is a trade-off between structuring the students' activities over the full semester and allowing them to design their own projects. Given that the students who have taken this course have little to no work experience, I have leaned toward a structured approach. Recently, I have found success in the self-directed approach, but this decision should be made based on the experience and motivation level of the group.

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Finally, there is a trade-off between using an organization theory textbook and not using a textbook at all. Three textbooks have been tested in the course, and it is my conclusion that no one book meets the needs of an undergraduate course. Examples used in the textbooks tend to be dated and overlook non-business organizations (e.g., nonprofits, government agencies). What has been most useful is to draw primarily from the World Wide Web and publications like *Nonprofit Times*, *Fast Company,* and the *Wall Street Journal.*

Recommendations

The Strategic Learning Cycle: A Link Between HRD Theory and Strategic HRD Practice

The development and delivery of the AOT course was found to follow a four-stage process, proposed as the strategic learning cycle, as shown in Figure 10. This process mirrors Kolb and Fry's (1975) experiential learning cycle, which "emphasizes the important part that experience plays in the learning process" (Boud et al., 1985, p. 12). It is also informed by Boyer's (1991) recommendation that learning at the graduate level, should encompass four domains of learning: the scholarship of discovery, the scholarship of application, the scholarship of integration, and the scholarship of teaching. These two concepts have been considered in the creation of the Strategic Learning Cycle.

In Stage 1 (Discovery), the learner is initially exposed to abstract concepts (e.g., strategic thinking or the five schools of organizational thought). In Stage 2 (Testing), the learner is prompted to test the implications of the concepts through individual and small group exercises and learn ways that his or her knowledge and experience can be used in the application of those concepts. In Stage 3 (Application), the learner is provided the

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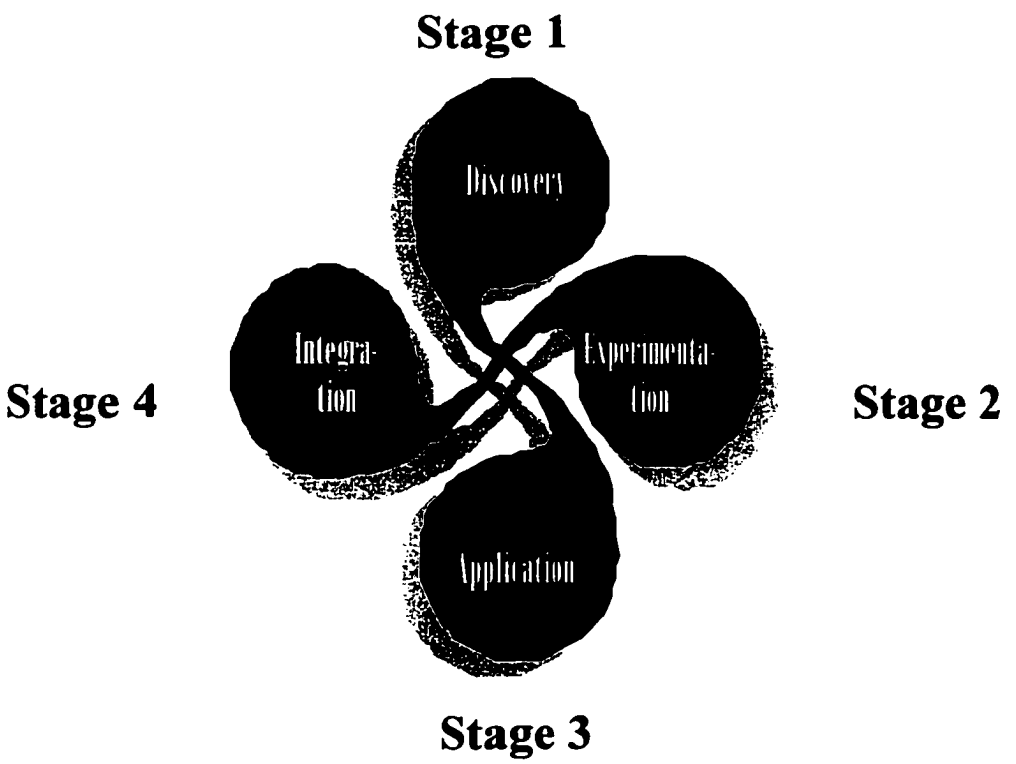

Figure 10. Strategic learning cycle.

Note. Based on "The Scholarship of Teaching from Scholarship Reconsidered: Priorities of the Professoriate," 1991, by E. L. Boyer, n.p., *College Teaching, 39*(1).

opportunity to test the concepts he or she has learned in a real-world situation (in this case, the group or class project). Stage 4 (Integration) is the final stage in which the learner reflects on his or her experience. Specifically, the learner demonstrates his or her ability to make connections between theory and practice. This model will require testing in future courses, but is offered in this study as a "linking pin" between HRD theory and strategic HRD practice, as shown in Figure 11.

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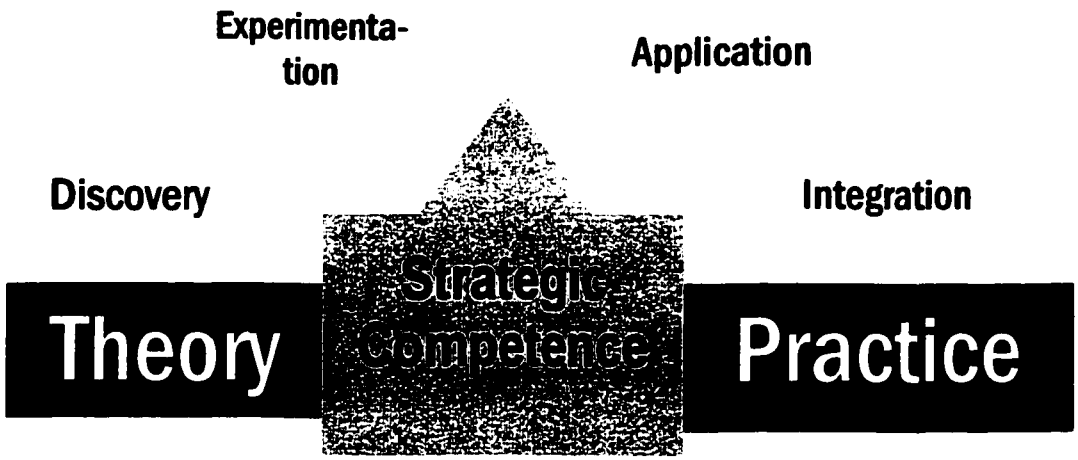

Figure 11. The link between HRD theory and strategic HRD practice.

Areas for Further Research

Future research on developing courses with an emphasis on strategic thinking skills might consider the following questions:

1. What role(s) does strategic knowledge and thinking have in undergraduate and graduate level HRD curriculum?

2. How should strategic knowledge and thinking be addressed in HRD curricula (e.g., what should be required courses, elective courses, and/or integrated into other courses)?

3. What theories, concepts and models are relevant for developing strategic knowledge and thinking?

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Summary and Conclusions

Given that the notion of strategic competence has yet to gain prominence in HRD literature, this chapter set out to demonstrate how strategic thinking skills could be developed at the undergraduate level. The objective of the course described was to explore moving toward an application-oriented course that provided students a real world context for learning organization theory.

It is concluded that the concepts of the organization theory learning system and the strategic learning cycle presented here expose students to strategic thinking and to the meaning of performing in strategic organizational roles. It is also concluded that they indeed are transferable to graduate level HRD curricula and to HRD professional development workshops. I hope that these concepts will be further explored and tested within the HRD context so that the field will begin to develop its own set of teaching methodologies.

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CHAPTER VI

THE SCHOLARSHIP OF INTEGRATION: SUMMARY AND CONCLUSIONS

Summary

This study explored the concept of strategic human resource development in the context of practitioner competence, education and development. Three propositions were investigated. First, the current HRD model, which emphasizes the design and delivery of training, education, and development, is no longer sufficient to meet the needs of today's organizations. SHRD was viewed as a more effective approach to influencing organizational change and performance. Second, SHRD calls for a broader set of knowledge, skills, capabilities, and roles/characteristics. The traditional and still dominant HRD paradigm fails to adequately address the necessary competencies for strategic HRD roles. The third proposition was that action is needed to advance the concept and practice of SHRD beginning with the preparation and development of current and future HRD practitioners.

Key findings are summarized as follows:

1. SHRD is being addressed in HRD discourses, however the role and competency of practitioners in facilitating SHRD is unclear.

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2. Several dilemmas in general HRD practice, including incongruent theoretical and practice principles, were found that seemingly impede progress toward improved and more sophisticated practice.

3. The mission, curricula, and course offerings by many HRD graduate and undergraduate programs are not inclusive of the strategic HRD paradigm.

Implications and Future Directions

Several implications for HRD research, education, and practice were identified.

Operationalization of SHRD

Practitioner preparation for SHRD practice and strategic organizational roles has not been addressed in the literature. SHRD needs competent practitioners who have the knowledge, skills, and capabilities to perform in strategic organizational roles and to advance SHRD practice.

While rapid environmental shifts (e.g., globalization and information technology) and the changing workforce are impacting the rate and breadth of change in today's organizations, HRD continues to struggle with a lack of prominence in the organizational architecture. Although the emergence of the "chief learning officer" title may be indication that this is changing to an extent, a lack of perceived legitimacy is a barrier to the advancement of SHRD practice.

The ongoing struggle to bridge the gap between what HRD researchers know and what practitioners do is creating a noticeable void in HRD discourses as it relates to effective SHRD. Few articles and no practical texts have yet to be generated on the subject.

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In order to overcome the barriers identified in this study and to advance SHRD practice, the HRD field needs to focus its energy on building the field around strategic practice. "Operationalizing" SHRD practice will require, for example, clear standards of practice and excellence, expanded and more rigorous organizational research, greater collaboration between researchers and practitioners, and enhanced HRD curricula that reflect the emerging strategic focus. A strategic competency framework (knowledge, skills, and capabilities) was presented in this study as a starting point. However, more work is needed to build a competency model that HRD educators, practitioners and students can apply.

HRD Education and Development

A lack of consistent standards and guidelines for HRD education was found. HRD researchers and educators should partner with practitioners to enhance HRD curricula to support the emerging strategic direction of practice. If new practitioners continue to be educated and developed in the traditional HRD schools of thought, then they will not be prepared to meet strategic organizational needs. Likewise, practitioners should engage in and contribute to HRD discourses so that an industry perspective informs the field.

The ability to think and act strategically will transcend organizational crises and uncertainty, leadership transitions, and management fads that will surely come and go. The fundamental HRD competency should be the ability to think and act strategically in whatever roles practitioners find themselves.

In order to move toward strategic status in today's organizations, HRD discourses need to shift from training methodology discussions, or "how" questions, to broader

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"what" and "why" questions. Along with the competency framework, an example of a course revision that emphasizes strategic thinking skills was presented as an initial step to advance HRD practice. Practitioner development can take place in formal and information settings. Communities of practice were suggested as one approach to create a climate for shared SHRD knowledge expertise across organizations and geographic regions.

Areas for Further Research

Areas for further research were provided in each chapter, but one recommendation bears repeating here. There is a clear need for further research to develop a useful strategic competency model that can be added to the existing HRD competency model. A more in-depth study of strategic HRD performance would lead to a better understanding of the factors (e.g., competencies or performance standards) associated with SHRD practice. The shift from a strategic competency typology, as suggested in Chapter III, to a fully operational competency model, will require further research to determine the appropriate knowledge, skills, capabilities, roles, and attributes that lead to strategically competent practice. Given that many HRD academic programs base curricula on ASTD's HRD competency model, more work is needed to clarify the existing model and ensure that strategic competence is added.

Conclusions

There is growing recognition of strategic human resource development as an enhanced HRD approach. Until now, the dynamic of HRD practitioner competence in SHRD has been unexamined in the body of HRD literature. This study attempted to addresses the gap (also referred to as the knowledge-action conflict) between how HRD

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is generally practiced and what is needed for effective strategically focused practice. The concept of strategic competence was used to bridge my knowledge and experience in HRD practice and to provide a practical framework for the improvement of SHRD practice.

Two major conclusions were drawn. First, SHRD must be supported with stronger theoretical and practical models. Second, work is needed to improve practitioner readiness for strategic organizational roles, and HRD education and development should be enhanced to deepen practitioner expertise including strategic knowledge, skills, and capabilities.

By improving practitioner readiness for strategic organizational roles, the field of HRD as well as SHRD practice will gain greater influence and respect as a legitimate partner in the ever-changing world of organizations.

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APPENDIX A

BATISTE PROFILE

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"The Emerging Practitioner"
Amy Leilani Batiste
Age 3

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Amy L. Batiste

- **Strategic Human Resource Training, Education & Development**

Needs Analysis
Design & Delivery
Performance Coaching

- **Organization Development & Effectiveness**

Group Facilitation
Project Management
Process Consultation
Strategic Thinking & Planning (Development and Facilitation)
Organizational Assessment & Research

- **Organizational Communication**

Communication Strategies
Corporate Events
Multimedia Production
Executive Speechwriting

Amy Batiste is an educator, organization strategist and human resource development practitioner seeking a senior leadership role in a progressive, service-oriented organization.

Enterprise-wide strategic thinking and action has advanced Batiste's 15-year career in the public and private sectors. Her current practice encompasses strategic human resource development, organization development and effectiveness, and organizational communication with expertise in leading challenging, multifaceted initiatives. She has designed, implemented and evaluated advancement strategies in corporate, nonprofit, government, and educational settings.

Batiste is a strategic business partner at all organizational levels, providing leadership and technical expertise in creating, transforming, and executing organizational strategies. She applies her knowledge of applied adult learning theory, organization theory, group dynamics, and human resource management and organization effectiveness to improve an organization's visioning, empowerment, learning and problem-solving capabilities.

In addition to her practical experience, Batiste is a teaching associate and doctoral candidate at Vanderbilt University, where she has honed her skills and expertise in the areas of leadership theory and practice, organization development and strategic human resource development.

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Amy L. Batiste

Current Position: Principal, *Batiste, Woodwick & Scott*
Organization Development & Advancement Consulting

Areas of Expertise: Strategic Human Resource Training, Education & Development, Organization Development & Effectiveness, and Organizational Communication

Education:

Doctor of Education (Ed.D.)
Human Resource Development
Peabody College of Vanderbilt University
Nashville, Tennessee
May 2002 Candidate

Master of Arts Degree (MA)
Public Communication
The American University
Washington, D.C.
August 1992

Bachelor of Arts Degree (BA)
Communication/Speech Communication
Trinity University
San Antonio, Texas
May 1987

Clients

- BellSouth Supplier Diversity - Atlanta
- Bethlehem Centers of Nashville
- Comprehensive Care Center – Nashville
- Fisk University
- Former U.S. Vice President Al Gore
- HCA – HealthTrust Purchasing/HCA Supplier Chain Services
- Inroads, Inc. Alumni Association - Nashville
- Matthew Walker Comprehensive Health Center
- Metropolitan Nashville General Hospital
- Metropolitan Nashville/Davidson County Public Schools
- Nashville CARES
- National Association of Educational Buyers
- National Association of Health Services Executives – Nashville
- National Association of Independent Schools
- National Black MBA Association - Nashville
- North Nashville Community Development Corporation
- OfficeMax 2001 Leadership Summit
- Paula McGee Ministries, Inc.
- Project REACH 2010
- Tennessee Breast Cancer Coalition
- Tennessee Donor Services
- Tennessee Minority Supplier Development Council
- University of Texas at San Antonio Alumni Association

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Professional History

Professional Teaching Associate - Vanderbilt University (Nashville, Tennessee)
August 1998 to present

- Teaching undergraduate courses in the Department of Human and Organization Development including: Advanced Organization Theory (HOD 2720) and Leadership Theory & Practice (HOD 2700).

Project Leader - Saturn Corporation (Spring Hill, Tennessee)
June 1996-August 2000

- Served as project leader for supplier quality events/conferences and for Saturn's supplier education and training program ("Saturn University"), winner of General Motors President's Council Award for originality and creativity in contributing to GM business objectives. Coordinated the corporate supplier diversity program at GM-Small Car Group (Troy, MI) and at Saturn Corporation (Spring Hill, TN). Designed and implemented supplier diversity program initiatives including a supplier mentoring program, supplier performance tracking systems, and training programs for internal staff and suppliers. Exceeded expenditure goals in1996, 1997 and 1998. Co-initiated and facilitated GM-North America Operations strategic planning efforts to integrate minority supplier development initiatives across all GM divisions. Organized internal and external special events promoting the supplier diversity initiative including the first GM Minority Supplier Summit (1998).

Senior Vice President - Girl Scout Council of Cumberland Valley (Nashville, Tennessee)
November 1993-May 1996

- Led the Council's largest operating unit, serving 23,000 girl and adult members in a 38 county jurisdiction. Accountable for member recruitment and retention, troop management, program services, outreach services, adult education and training, volunteer support services, community initiatives and fund raising. Supervised a six-member management team that coordinated the work of 33 full- and part-time staff. In 1995, the Membership Services Team achieved the highest membership enrollment in Council history. Initiated member satisfaction research and Council-wide continuous quality improvement efforts.

Acting Director/Consultant - National Clearinghouse for Professions in Special Education (Alexandria, Virginia) October 1992-October 1993

- Served as project administrator of the Clearinghouse Policy Center (Alexandria, VA) and the Professions Information Center (Reston, VA), funded by the U.S. Department of Education. Launched a national pilot outreach initiative to recruit under-represented groups into special education and related services professions.

Assistant Director of Admissions - Trinity University (San Antonio, Texas)
April 1988- August 1991

- Coordinated special events, communications, outreach programs and national recruitment activities. Evaluated undergraduate admissions applications and cultivated new markets in the Mid-Atlantic and Northeastern regions of the United States.

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Account Executive - Dublin-McCarter & Associates Public Relations (San Antonio, Texas)
June 1987-April 1988

- Assisted in all aspects of regional and national media planning; developed public relations plans and strategies for corporate clients.

Invited Presentations

Project Reach 2010 – November 2001 (Nashville)
Presenter: *Social Marketing: Strategies for Planned Social Change*

National Association of Health Services Executives – May 2001 (Nashville)
Presenter: *Real Leadership*

National Association of Educational Buyers 2001 Conference (Nashville)
Workshop Leader - *Juggling Acts: Strategies for Successful Work-Life Balance* and *Professional Edge=Professional Image*

BellSouth – October 2000 (Atlanta)
Presenter: *Innovate! The Art of Selling Supplier Diversity to Internal Stakeholders*

Lucent Technologies/Microelectronics Group – July 1999
Co-Presenter: *Corporate University Conference (Video Conference)*

The International Quality Productivity Center -- April 1999 (Chicago)
Corporate University Conference
Presenter: *Saturn University: A Dual Purpose Approach to Continuous Improvement*

Arizona Employer's Council Annual Conference - October 1998 (Tucson & Phoenix, AZ)
Co-Presenter: *Corporate Learning - The Saturn Difference*

Try Us Resources, Inc. Best Practices Seminar - August 1998 (Los Angeles)
Presenter: *How to Sell Your Minority Supplier Development Program*

Alpha Omicron Pi Leadership Institute -- June 1998 (Nashville)
Presenter: *Leading with Style* and *Knowing Yourself to Lead Others*

Texaco/Star Enterprises Minority Supplier Conference – September 1997 (Atlanta)
Presenter: *Partnerships for Success: The Saturn Difference*

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Accolades

- Peabody College Roundtable Outstanding Leadership Honoree (2002)
- Guiding Star Award (2000) and Service Award (1999, 2000) - Saturn Corporation
- Full-time Professional Graduate Student Fellowship – Vanderbilt University (1998-2002)
- Part-time Minority Professional Student Scholarship – Vanderbilt University (1996-1997)
- Northwest Family YMCA Black Achiever Award (1996)
- Graduate Student Assistantship – The American University (1991-1992)
- The United Methodist Church Board of Higher Education & Ministry Scholarship (1991-1992)
- Delta Sigma Theta Sorority National Scholarship (1991)
- Trinity University Alumni Association Award for Outstanding Community Service (1983)
- Trinity University Ellis K. Shapiro Outstanding Public Relations Student Award (1983)
- The Girl Scout Gold Award (1982)

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APPENDIX B

HRD PROGRAM ASSESSMENT SUMMARY

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		Program level		Program mission		Courses Associated with Strategic Characteristics											Placement			Total Points
Institution	Degree Type	Undergraduate	Graduate	Strategic HRD	HRD	Org. Effectiveness	Org. Dev./Consulting	Org. Theory	Org. Behavior	Org. Strategy/Planning	Org. Change	Org. Culture	Int./Glogal HR/d	Mgmt./Busn.	Human Res. Mgmt./Planning	Prog. Eval.	Strategic HRD	School of Ed.	School of Busn./Mgmt.	Other	
Abiline Christian University	MS/HRD		1	1				1	1											1	3
Amberton University	MS-HRT		1		1						1	1							1	1	2
Azusa Pacific Univeristy	MA-HOD		1	1			1		1	1	1		1	1	1				1		8
Barry University	PhD/L&HRD		1	1			1		1		1		1			1		1			6
Boston University	M Ed -HRE		1	1					1		1							1			3
Bowie State University	MA-HRD		1	1			1													1	2
Carlow College	MS-PL-T/D		1	1				1						1						1	3
Colorado State University	M Ed /HRD		1		1		1			1			1					1			3
Florida International University	MS-HRD		1		1													1			0
Friends University	MS-HRD/OD		1	1			1		1		1									1	4
George Mason University	MS-OL		1	1			1	1												1	3
George Washington University	MA-HRD		1	1			1							1		1	1	1			5
Georgia State University	MS-HRD		1		1															1	0
Illinois Institute of Technoogy	MS-Personnel & HRD		1																	1	0
Iowa State Univerity	M Ed. - OL/HRD		1		1		1				1				1	1	1	1	1		5
James Madison University	M-HRD		1		1													1			0
Loyola University Chicago	MS-T/D		1		1		1	1	1		1				1					1	5
Marymount University	MA-HPS		1		1		1		1		1				1		1		1		5
Northeastern Illinois University	BA-HRD & MA-HRD	1	1	1	1		1	1								1		1			4
Oakland University	BS-HRD & M-T&D	1	1	1	1		1				1	1	1			1		1			6
Penn State University	MS-HRD		1		1		1											1			1
Rochester Institute of Technology	M-HRD			1	1		1			1					1	1				1	5

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		Program level		Program mission		Courses Associated with Strategic Characteristics												Placement			Total Points
Institution	Degree Type	Undergraduate	Graduate	Strategic HRD	HRD	Org. Effectiveness	Org. Dev./Consulting	Org. Theory	Org. Behavior	Org. Strategy/Planning	Org. Change	Org. Culture	Int./Glogal HR/d	Mgmt./Busn.	Human Res. Mgmt./Planning	Prog. Eval.	Strategic HRD	School of Ed.	School of Busn./Mgmt.	Other	
Rollins College	M-HR/HRD		1	1			1								1					1	3
Siena Heights University	MA-OL		1	1			1		1	1		1								1	5
St. Joseph's Univeristy	M-TOD		1		1		1						1							1	2
Suffolk University	MS-AOL		1		1										1			1			1
Texas A&M University	MS-EHRD		1		1		1											1			1
Towson State Univesity	MS-HRD		1	1		1	1		1						1			1			5
U. of Georgia	M Ed - HROD		1		1		1		1		1		1		1		1	1			6
U. of Illinois - Urbana Champaign	M Ed - HRE		1	1			1			1			1	1	1		1	1			7
U. of Louisville	BS-T/D + MEd - HRE	1	1		1											1		1			1
U. of Minnesota	BS, M Ed, MA Ed D, PhD - HRD	1	1		1		1			1								1			2
U. of St. Thomas	MA-HRD		1	1			1	1	1		1				1	1		1			7
U. of Tennessee	BS/MS/PhD-HRD	1	1		1															1	0
U. of Texas - Austin	MA-HRDL		1		1				1		1			1	1		1	1	1		5
U. of Wisconsin - Stout	MS-TD		1		1		1	1		1					1	1				1	5
Vanderbilt University	BS-HOD, M Ed - HRD, Ed D - HRD	1	1		1		1	1								1		1			3
Western Carolina University	MS-HRD		1		1		1									1		1			2
Western Maryland College	MS-HRD		1		1		1	1	1	1	1	1	1		1				1	1	8
Xavier University (OH)	M Ed - EHRD		1	1		1			1							1				1	4
Report Summary	N/A	6	39	18	24	2	27	9	14	8	13	4	8	4	14	12	6	21	6	17	

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APPENDIX C

COURSE DESCRIPTION: HOD 2720 (01)

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HOD 2720 – Section 1

Advanced Organization Theory

[redacted] *eets: Tues./Thurs. – 9:35 – 10:50 a.m. – Mayborn 105*

[redacted] *or: Amy L. Batiste, MA*

[redacted] *Email: amy.batiste@vanderbilt.edu*

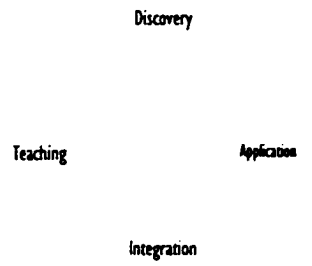
[redacted] **Office Hours: Upon request via email**

[redacted]

[redacted] **Prerequisites: HOD 1200, HOD 1700.**

Course Description

The world of organizations is constantly changing.



The Mission - This course is designed to prepare students to comprehend, analyze, explain and respond to organizational dynamics at the "macro" level and to become strategic thinkers in organizations. The course will achieve this by developing a systematic understanding of the complexities of organizations in modern society.

Specifically, *The Goal* is for each student to develop knowledge and skills to be able to make significant contributions in organizational settings in the future. To achieve this, the course discussions and assignments will be organized so that students will develop in the following areas: Discovery (conducting research, making sense of it and then reporting results); Application (demonstrating that students can explain and respond to organizational challenges by applying theory to real situations); Teaching (sharing knowledge and engaging others in improving their understanding of organization theory); and Integration (demonstrating comprehension of course material).

The Objectives - By the end of semester, students should be able to:

- Identify and explain the nature of organization theory (Discovery);
- Research and report on a trend in the world of organizations (Discovery);
- Conduct an organizational analysis using theory or tools (Application & Integration);

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- Demonstrate strategic thinking skills by preparing a strategic plan (Application); and
- Present (orally) coherent analyses and conclusions (Teaching).

[redacted]ired Skills - Students will apply and further develop skills in the [redacted]wing areas:

- Planning
- Teamwork
- Communication
- Consensus-Building
- Presentations
- Critical Thinking
- Research & Analysis
- Professional Writing

R[redacted]ed Text & Electronic Resources

Daft, R.L. (2001). *Essentials of Organization Theory & Design* (Second Ed.). Cincinnati: South-Western College Publishing.

- Supplemental reading is required. Articles addressing current issues and events will be provided electronically and as handouts.
- **Blackboard.com** will be used as our electronic course connection. Announcements, class session outlines, additional required readings and course assignments will be posted to this site. Login instructions will be sent via email.

[redacted]se Requirements & Evaluation

Your grade (e.g., job performance) will be based on the following elements, which are explained in further detail below:

Maximum Points	*Activity*
0 Points	Course Preparation (part of Participation & Performance Grade)
50 Pts.	Trend or Issue Report (Discovery)
50 Pts.	Strategic Planning Exercise (Application)
100 Pts.	Quizzes (2 @ 50 points each) (Discovery)
100 Pts.	Organization Analysis (Application & Teaching) (Group Project)
100 Pts.	Participation & Performance
100 Pts.	Final Exam (Integration) **500 Points Total**

Final Grades

470-500 Points = A
450-469 Points = A-
430-449 Points = B+
420-429 Points = B
400-419 Points = B-
380-399 Points = C+
370-379 Points = C
350-369 Points = C-
330-349 Points = D+
320-329 Points = D
300-319 Points = D-
Below 300 Points = F

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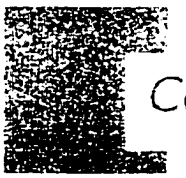

Course Evaluation Checklist

Assignment	Max Points	Actual	Description	Due Date
Course Preparation	0		This is a simple assignment designed to establish mutual expectations regarding performance in the course. The Course Agreement will indicate that you have read and understand how the course is structured (the mission, goal, expectations and assignments). The Student Profile and resume will orient the instructor to your background and experience. The login process will introduce you to Blackboard, which is our main vehicle for exchanging information outside of class.	**Jan. 17**
Trend or Issue Report	50		**The purpose of this assignment is to assess your ability to quickly research, analyze and report on a pressing trend or issue affecting organizations. Instructions will be posted on Blackboard.com.**	**Jan. 24**
Quiz #1	50		5 Questions - Short Answer. Quiz will be administered electronically via Blackboard.com. *Note: Questions will be based on topics covered in the class, including issues presented by your peers. The prepared student will have taken time to do the readings, outline the text, and take good notes in each class session.*	**Jan. 31**
Quiz #2	50		5 Questions – Short Answer. Quiz will be administered electronically via Blackboard.com	**Feb. 28**
Strategic Plan	50		Preparing a strategic plan will enable you to demonstrate your strategic thinking skills. Instructions will be posted on Blackboard.com.	**Mar. 14**
Organizational Analysis (Group Project)	100		Using theories and/or tools we've explored, you will conduct and present an analysis on one aspect of an organization. This assignment must be conducted in groups (minimum of three people). Guidelines for this assignment will be provided later in the course.	**Apr. 18**
Final Exam	100		The final exam will be administered electronically via Blackboard.com	**Apr. 30**
Class Participation & Performance	100		See detailed description of grading criteria posted on Blackboard.com	

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Course Schedule through February 2002

The course schedule is subject to change!

Week	*Topics* Readings, session outlines and guidelines for assignments will be posted and updated on Blackboard.com
Jan. 10	Course Overview
Jan. 15-17	▶ **Why Organization Theory?** ▶ **Evolution of Organizational Thought** o *Classical to Behavioral Theorists* o *Modern to Postmodern Theorists* **Course Prep. Documents due on 1/17**
Jan. 22-24	▶ How Theory Gets Applied in the Real World ▶ Introduction to Organizational Analysis ▶ Planning for Organizational Analysis Assignment **Trend Analysis due on 1/24**
Jan. 29 - 31	Organizational Analysis ▶ Levels of Analysis ▶ Structural & Contextual Dimensions ▶ Organization Excellence ▶ The External Environment **Quiz Due on 1/31**
Feb. 5-7	**Organizational Analysis** ▶ Size ▶ Structure ▶ Lifecycle ▶ Culture
Feb. 12-14	Strategic Planning ▶ Goals, Strategy & Effectiveness ▶ SWOT Analysis ▶ Mind Mapping ▶ Scenario Planning
Feb. 19-21	Planning for Organizational Analysis Assignment **Guest Lecturer – 2/19/02**
Feb. 26-28	**NO CLASS on Thursday, 2/28** **Quiz Due on 2/28**

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Course Schedule through April 2002

March 5-7	**SPRING BREAK**
March 12-14	Group Project Work Session with Instructor **Strategic Plan due on 3/14**
March 19-21	Group Project Work Session on your own
Mar. 26-28	Group Project Work Session with Instructor
Apr. 2-4	Project Presentations & Debriefing
Apr. 9-11	Note that the Final Exam is based on the project presentations and debriefing sessions.
April 16-18	
April 23	**Course Evaluation** **Final Exam Preview**
April 30	**Final Exam**

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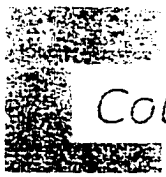

Course Policies

Honor Code

Honesty and integrity are absolutes! Adherence to the University Honor Code applies to all aspects of the course.

Use of Sources

Submission of work that is not your own will be severely penalized. This includes, but is not limited to, using the words of others without using quotation signs and failing to properly cite your sources. See the course web site for helpful hints on writing and citations.

Policy on Quizzes & Assignments

Assignments must be submitted per instructions on the date they are due. NO EXCEPTIONS. A grace period will be granted only with a supporting letter (email) from your advisor or dean. All late papers, except those situations caused by a demonstrated medical or family emergency, will be assessed a penalty of one letter grade (10 points) per day it is late.

Accommodations

If any member of the class feels that he/she has a disability and needs special accommodations please see me during the first week of January 14. Be prepared to submit documentation from the VU – Opportunity Center so that your needs will be appropriately met.

If you are an athlete and expect to be traveling during the semester, you are still responsible for fulfilling the course requirements as written. Please ensure that I have a copy of your team's game schedule and a memo from the athletic/academic liaison highlighting the dates that you will miss class.

Grievances

Any grievances regarding the course content or grades should be addressed first between the student and the instructor. The first step is to schedule an appointment to discuss the nature of your concerns and a possible resolution.

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[redacted] 2720 (01) Advanced Organization Theory – S[redacted]2

Student Profile

Last Name Name	First Name	Middle Initial	Preferred

Classification (Check one):

___Sophomore ___Junior ___Senior

Address	Telephone Number	Preferred Email Address

Home Town	Name of Your Advisor	Major(s)	Minor(s)

Why are you taking this class? ___Requirement ___Elective

Career Goal _____

If you have completed an internship, please indicate when, where and your role.

Date Roles/Responsibilities	*Organization/Location*	*Major*

SPRING 2002 COURSES	**MAJOR ACTIVITIES**	**COURSE EXPECTATIONS**
Please list the other courses you are taking this semester.	Please list the major non-academic activities (and any leadership roles) you are involved in this semester (clubs, athletics, part-time work)	List three things you expect to gain from this course ("Don't know" is not an acceptable answer)

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Advanced Organization Theory

HC[redacted]20 – Section 1

Course Agreement

Na[redacted]

I h[redacted]d the course syllabus;

I understand the requirements of the course;

I understand that it is my responsibility to ensure my own success in this course and, that when assistance or clarification is needed, I will communicate with the instructor in a timely fashion; and

I understand that my contributions to class discussions and group activities are an essential element of my Participation & Performance grade.

Signature **Date**

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Advanced Organization Theory
HOD 2720 – Section 1

Trend Analysis Assignment

The purpose of this assignment is to identify trends and issues facing today's organizations. The assignment also assesses your ability to quickly research, analyze and report on a pressing trend or issue affecting organizations.

Instructions:

(1) Select a trend from the list below. Note that if a trend interests you that is not on this list, you may propose a topic. Send an email to A. Batiste to request approval.

(2) Conduct research using the Internet and library databases to identify and track the trend or issue. Search the topic in multiple sources (newspapers, journals, business press).

(3) To adequately analyze and report on the trend, you will need to assess the major patterns or themes found in your sources. Describe what's currently going on. What were some of the issues or events that led to this trend or issue? Include a description of the trend/issue and any history and recent developments.

Provide evidence from your sources as to who is addressing/experiencing this trend/issue. Describe the individuals and/or the organizations where this trend is having a direct impact.

Explain how you think this trend will affect organizations in the future.

Write a memo to me (use Microsoft Word 97 or above) of no more than 5 typed pages that tracks the trend in various literatures. Be sure to include a "Works Cited" page.

Your sources must include web sources, scholarly work (e.g., journals) and business press (e.g., *Wall Street Journal*, *Fortune*, *Business Week)*. Correct use citations must be employed.

Note: Research papers should be written in clear, correct, properly spelled, literate English. For help on grammatical issues, consult any standard English grammar text. Last-minute disk crashes, equipment failures, software foul ups, etc. are not acceptable excuses for late papers. Computers are useful but not infallible, and you should allow an extra time margin to handle unexpected electronic "gremlins."

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Possible Trends for Exploration:

The Bush Administration. President Bush is a businessman (he has an MBA) turned politician. How has this helped and/or hindered his administration's performance so far?

Leadership changes in collegiate or professional sports organizations. Based on your research, what are the strategic advantages of such moves? What are your predictions about the ways in which the recent post-season changes have/will improve(d)these organizations?

Enron. What happened and how have these events affected employees? What implications do think the collapse of Enron creates for large companies and their effectiveness.

Diversity. Major shifts in U.S. workforce demographics are expected to impact organizations sooner that originally predicted. What might this mean for organization strategists?

Downsizing. While seen today as a routine part of doing business, downsizing affects thousands of people every year. Just last week Ford Motor Co. announced sweeping changes. How do companies like Ford handle (strategically) downsizing? What are the anticipated gains for the organizations from these actions? What are the effects of downsizing on organizational performance?

The state of work-life balance initiatives. Are they delivering all that had been promised? How are these policies affecting organizational performance?

The growth of small businesses in the U.S. has been dramatic. What factors contribute to this trend, and what implications does small business growth have for our economy?

The shift from traditional training models (focusing on the individual) to organizational learning. How is it working?

Or, feel free to propose a trend that interests you!

Grading:

50 Points - Superior Quality- Exceeds Expectations
45 Points - Good Quality - Meets Expectations
40 Points - Average/Satisfactory - Minimally Meets Expectations
35 Points -- Below expectations
30 Points and below - Does not meet expectations

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Advanced Organization Theory
HOD 2720 (01)

Strategic Planning Assignme

Me Inc.

1

Brainstorm

Use one of the following tools:

- Mind Mapping
- Scenario Planning

to generate ideas and real possibilities for your organization – *Me. Inc.*

2

SWOT Analysis

What are your current assets? What do you have going for you that will help you get where you want to go? What are you good at? ***Strengths***	What opportunities do you see "out there" (personal, career) that could impact your vision/mission? What changes do you see in the external environment that create opportunities for Me, Inc.? ***Opportunities***
What are your current liabilities – those things that will hinder you from achieving your vision/mission? ***Weaknesses***	What trends or potential threats do you foresee that might adversely affect the attainment of your vision/mission? What about competition, the future job market, the economic outlook? ***Threats***

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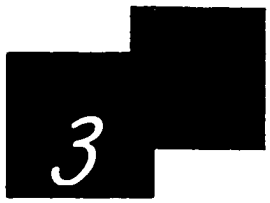

It is the place where you want to be in three to five years...

Vision Statement

The most important goal I have for the future.

Consider the question – What is impossible to do today, but IF it could be done, it would dramatically change your future.

What I value...

My greatest continuing challenge or opportunity...

It is an expression of who you are and what you intend to DO to achieve your purpose.

Mission Statement

1. Go to: http://www.franklincovey.com/ez/
2. *Click on Mission Formulator*
3. Complete the Process (Will take you about 20 minutes)

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5

Goals & Strategies

Goals	Strategies
1	1.1 1.2 1.3
2	2.1 2.2 2.3
3	3.1 3.2 3.3

Key to writing strategies:

Go back to your SWOT Analysis. Consider ways you can build on your strengths, resolve your weaknesses, exploit opportunities and avoid threats. If they do not improve your strategic position, then consider revising.

Write three goals:

***S**pecific*
***M**easurable*
***A**ction-Oriented (Use a Verb)*
***R**ealistic*
***T**ime-tied (By When?)*

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Write a three-page **executive summary** of your strategic plan. Introduce yourself. Describe what the plan covers. Present your vision, your mission, your goals and strategies.

Comment on the process you used to develop the plan. What did you take into consideration when developing the plan? Close with a statement that describes your confidence in the plan.

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Advanced Organization Theory
HOD 2720 (01)

Project Planning Process

1 – Expectations, Assets & Competencies

2 – SWOT Analysis

3 – Vision & Mission

4 – The Goal

5 – Possible Strategies (Mapping & Planning)

6 – Prioritization & Decision Making

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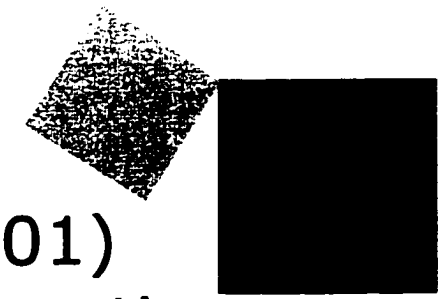

HOD 2720 (01)
Class Project Direction

"A plan is prompted by unsolved problems, unmet needs and aspirations, or existing systems requiring change or improvement."
– Nadler & Hibino (1999)

What is the problem(s) we are seeking to solve?

What is the overarching theme of the project?

What's unique about the problem/project?

What results are most important to fulfill the assignment?

How will the problem(s) be investigated?

What information is really needed?

How will we get people to participate and buy-in?

How will we work so that we benefit from class-wide knowledge, skills & capabilities?

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http://www.vanderbilt.edu/News/register/Apr24_00/story11.html

HOD class explains 'Generation Y' to Saturn team

by Amy Pate

With a presentation backed by fast-paced music, home-shot video and clips from the films Clueless, Empire Records and She's All That, the students in Amy Batiste's "Advanced Organizational Theory" class last week gave Saturn team members a snapshot of "Generation Y," a key demographic for the company.

Photos by Phonethip M. Liu

Student Richard Ellis explains marketing options that could appeal to Generation Y to Saturn team members.

The largest and most cross-cultural generation in U.S. history, the 78 million members of Generation Y, born between 1977 and 1994, spent $64 billion of their own money in 1994, according to the students' research. "Generation Y is here, and they want to drive," said student Tom Burns.

The students' presentations, created using PowerPoint, video clips and sound effects, revealed another key aspect of their generation: They are technologically savvy.

Divided into three teams focusing on consumer analysis, competitor analysis and strategic marketing analysis, the students were commissioned by the automaker to "lift the veil" on Generation Y, said Batiste, a fourth-year doctoral student who has been a Saturn

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team member for nearly five years in the area of supplier quality and development.

Students in Batiste's class last semester also presented a project to a group of Saturn team members. One person in attendance, Mark Wurl, was so impressed with the group that he approached Batiste about working with her spring semester class. Wurl heads Saturn's Competitive Benchmarking Team.

"He had a specific interest in understanding Generation Y, a target market for Saturn, and I was interested in the students applying what they had learned about the impact of external environmental factors on strategy formation," Batiste said.

Most students in the class, at ages 19 and 20, are among the oldest members of Generation Y. Thus they were able to give an insider's view to today's youth culture. "They felt that they could relate better because they speak and can, therefore, interpret the language," Batiste said.

"We're not keeping any secrets," student Gray Stream, a member of the consumer analysis group, said. The group defined their generation with six general characteristics, including being the "Net Generation."

"We have to stay connected," Stream said, by means including cell phones, pagers, e-mail and instant messenger.

"Gen Y," as it is often tagged, is also characterized by environmental and community concern and group behavior. Members of Gen Y "wear what everyone else is wearing and do what everyone else is doing," Allison Brown said, quoting a University of Tampere study.

The strategic marketing group translated the characteristics of Gen Y into how car companies market to them. The group test drove Saturn competitors such as

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the Dodge Neon, Ford Escort and Volkswagen Jetta, and developed a list of "must have" components, including air conditioning and a CD player.

The group also identified a list of options that could appeal to Generation Y. These included an upgradeable technology port, an MP3/CD player and extensive storage.

"We thought if Jansport made a car, we'd definitely buy it," student Boyd Christian said, referring to the popular backpack manufacturer. "We're not the cupholder generation anymore. We've gotten past that," he continued, drawing laughter and head nods in agreement.

The students then turned their attention to Saturn's marketing techniques. After showing a Saturn co mmercial, student Carrie Geller, a member of the strategic marketing analysis group, stood in front of a slide asking the question, "Why is this not appealing?"

Geller's answer -- that the ad's slow music, dull colors and lack of emphasis on the car -- bored Gen Y consumers.

Another Saturn ad, featuring a young driver who brought his car into successive dealerships for fictional problems so he could eat free doughnuts, fared better under the students' scrutiny.

"The key word here would be image," student Meredith Abbott said, noting that Saturn should consider updating its friendly and honest style with a bold, independent edge.

The strategic marketing analysis group also outlined promotional ideas for Saturn that could appeal to Gen Y. At the end of their presentation, they showed a stream of commercials appealing to them, including Volkswagen's "Turbonium" commercial and the Gap's "That's holiday" ad. What connected them were strong

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visuals, techno music and a fast pace. They were, in the words of one student, "hypnotic."

"Perception really is reality for Gen Y," student Brooks Finnegan said.

The session, which lasted more than an hour longer than the scheduled class time, closed with a question-and-answer session.

"We're trying to understand your generation," Wurl said. "I'm very impressed with what you presented us today. I appreciate the opportunity you've given us."

"The Saturn project not only gave the students a chance to link theory and practice, it allowed them to meet a real business need," Batiste said. "The students were challenged by the opportunity to deal with a real client -- from contracting the work to the delivery of a tangible product."

Class instructor and Saturn team member Amy Batiste opens the floor for questions from the visiting Saturn team members as students stand ready to give their opinions.

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