

Governance and Advisory Systems and Processes Align T&D with Business Strategy and Needs

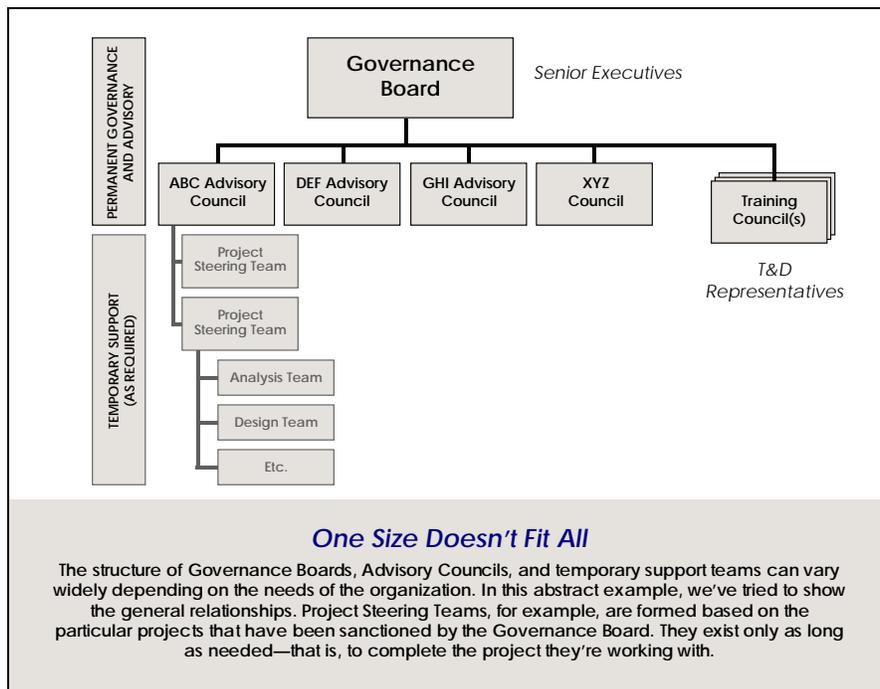
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In the CADDI Inc. spring '99 newsletter, we looked at the concept of *learning by design* from a systems standpoint: the leadership, core, and support processes that must exist for T&D to contribute to, not take from, the corporation's bottom line. Learning by design is about making informed, strategic T&D decisions and about getting certain stuff in control. It's not about controlling everything, only those factors that are critical enough to the business and to the business of T&D to warrant keeping in line.

Put another way, *learning by design is about serious training and development operations and about the business making serious T&D decisions in as rigorous a manner as all other critical business decisions are made, such as capital improvements.*

Our T&D Systems view consists of 12 interdependent processes (and lots of interrelated subprocesses). Some of these are found within the classic views of T&D organizations; others, like marketing and communications, are not always thought of as T&D Systems components. Each plays an important role in making the overall T&D system effective.



In this article, we're going to look at the 12 o'clock position and try to make sense out of the Governance and Advisory Systems. Let's start with the words we used to describe these systems in our previous newsletter.

The central, driving force behind the strategies for business-based T&D. These systems organize key stakeholders of the enterprise and formalize the channels of communication. They provide the forum for T&D's internal marketplace customers to provide advice, and give the organization's executive-level leadership governing power over T&D strategies, tactics, and resource allocations.

If you're like many of us dyed-in-the-wool T&Ders, you may have felt a twinge of undefined origin as you read the previous paragraph. After all, figuring out what needs to be developed and deployed is a decision for the T&D department to make. That's half the fun of having your own department with a large budget, right?

But you may have run into a downside lately: many different customers have been coming to you with multiple (and conflicting) priorities, and you don't have enough staff to meet the expectations. You also don't have the clout or support to go to the big bosses and make a legitimate case for more ISD-heads and budget. Worse yet, a few of the folks in the company aren't really sure you "get it"—they say your courses are sprinkled with "foo-foo dust."

Today, more and more companies—led by a new breed of ISD professional—are replacing this *learning by chance* approach to T&D decision-making with a systematically thought-through system that designs value in to the organization's learning activities and returns from the investments. Where the ISD professional *engages* key stakeholders in the key decision-making processes, appropriate T&D development efforts are linked to specific knowledge and skills that have been systematically derived as being *required* for successful performance, not just *nice-to-know* topics and learning games off the top of someone's head.

Training resource allocation decisions should always be based on improving the corporation's bottom line. Resource decisions can become "no-brainers"—if that favorite presentation skills workshop isn't working, its maintenance effort should get shelved for the higher gap T&D priorities that will return their weight in gold. Where should training dollars be spent: on developing 15 new salespeople to sell to emerging Pacific Rim markets (\$50 billion in new business is up for grabs) or on that new course on *feel good* interpersonal communications for the entire payroll of 32,000? If you were the single shareholder, where would you invest?

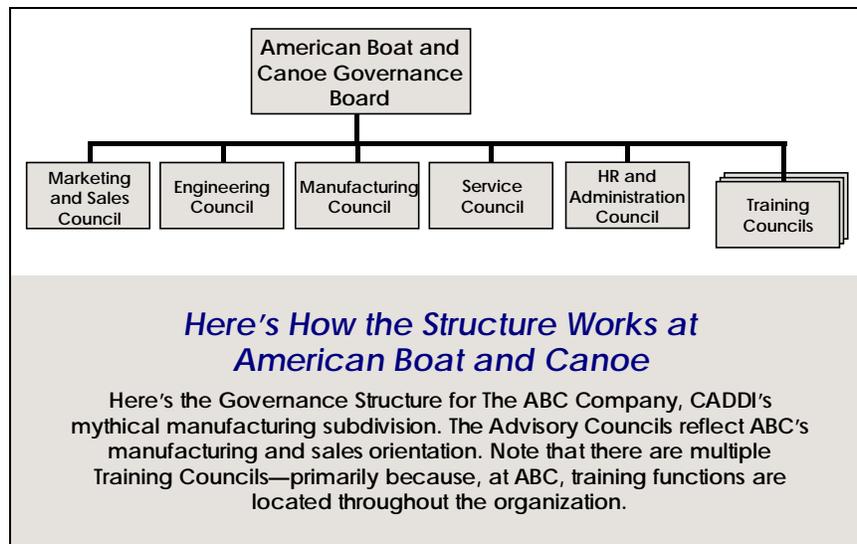
The power behind learning by design is the structure that governs the T&D decision-making processes. It begins in the Governance and Advisory Systems. The system consists of three components, the first two of which are permanent structures.

- A Governance Board, typically composed of executives of the enterprise, sanctions the overall T&D approach and allocates resources based on business needs and strategies and advice of the next groups.

- Advisory Councils are appointed by members of the Governance Board. The Advisory Councils represent their own domains (engineering, sales, marketing, for example), provide advice to the Governance Board as it decides where to expend the limited resources allocated to T&D, and then steer T&D efforts within their areas of interest after resourcing.

The third component is temporary.

- These are the teams temporarily put in place to support PACT and other T&D processes. They may include Project Steering Teams, Analysis Teams, Design Teams, and any other support teams that a Curriculum Architecture Design, Modular Curriculum Development, or Instructional Activity Development project requires. They are formed as part of a PACT Project, do their work, and disband once the project is complete. Project Steering Team members are appointed by the Advisory Council who, in turn, handpick all other project-related team members.



The Governance Process

The Governance Process organizes the executives of the company for directing and resourcing the T&D systems and efforts. Their focus is usually not on the “low-hanging fruit” with its mass appeal. Nor is their bias to fill empty classroom seats with employees who need a place to sit (we call this “butts in seats,” and it is a key measure of the lowest of the low-hanging fruit metric).

The only way to ensure that the T&D system is addressing the business-critical and highly important, high-payoff T&D is to systematically engage the leaders of the enterprise to double-check the findings of the Advisory Councils who provide investment recommendations to them. It builds confidence that T&D expenditures are I's with plenty of R's to follow (as in ROI).

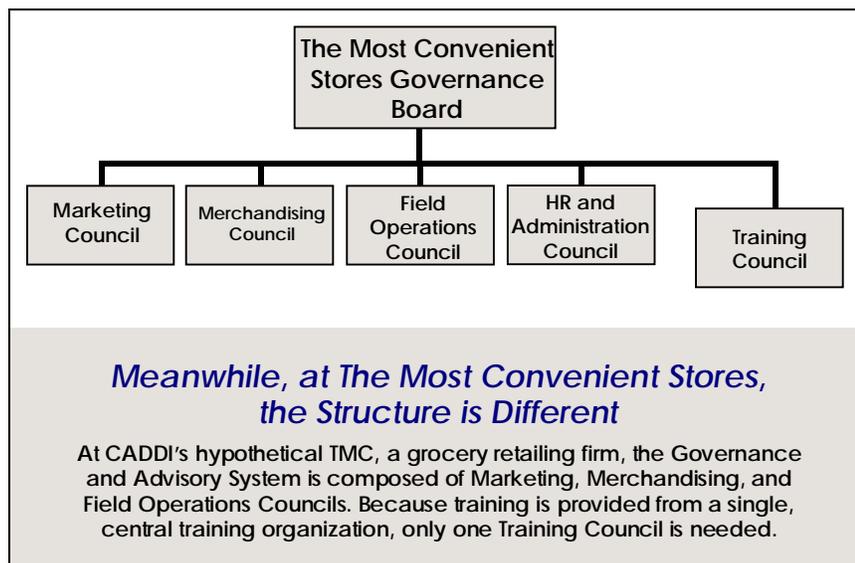
Ideally, the Governance Board includes the most senior executives of a company. These are the folks who understand the strategic direction of the business. When they make T&D decisions, they base them on how T&D can help align the people-resources with what needs to be done. This board doesn't try to use T&D to make up for bad organization structures, poor communication, bad processes, or any other quality-impacting element *except for the knowledge and skills that keep people from performing*.

The Governance Board will typically meet twice a year. The first meeting is in sync with the enterprise budget cycle. The second, six months after, is used to review and make any midcourse corrections. Members rotate on and off but still represent the key business functions or processes.

The Advisory Process

The Advisory Process includes a set of committees and councils immediately below the resource allocation, decision-making Governance Board. Advisory Councils look out for the more parochial T&D needs of individual functions and processes (processes owned by their functions) of the company.

How these councils are structured and the number of them depends, largely, on the organization and how it operates. Ideally, they should represent functions and disciplines and cover the leadership, core, and support business processes.



Advisory Councils also sanction and support T&D projects within their own domains. Steering Teams for CAD, MCD, and IAD projects are authorized by the Advisory Councils.

Members of the Advisory Councils usually serve three-year stints. One-third of the members leave the Councils each year and are replaced by other appropriate members who have been appointed by the Governance Council. This rotation in office is important to the continuity of the Councils' work. The Advisory Councils' meetings occur before the Governance Board meetings and are held at least twice a year.

Temporary Project Support

PACT Projects almost always use a team approach to producing/acquiring T&D. We don't advocate teams just for the sake of including people so they'll "feel good" about the process, but because the critical T&D needs of the organization are best addressed when the right people are involved in the right manner at the right time in the analysis, design, development, and/or decision-making needed in the CAD, MCD, and IAD methodologies.

Membership in the temporary support teams is determined by the specific criteria and plans for the particular PACT Project. Project Steering Teams are different from Analysis or Design Teams.

The key here is that the most valuable contributors to these temporary teams will be the busiest ones in the organization and getting them is difficult, unless they are appointed by leaders in their functions/disciplines. And then, their time must be used judiciously. It's always easier to obtain their help when they know that theirs is a temporary assignment with start and end points.

The Governance and Advisory Processes are the glue that hold high-impact T&D together. They provide the cross-organization knowledge that identifies real business/performance needs; they prioritize these needs and sanction which projects do and do not get resourced from among all the training needs that may exist.

This article was written in 1999 when Guy was at CADDI Inc.