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Project Overview

Purpose

The purpose of this project is to redefine and restructure the NSPI Awards System to meet the needs of NSPI Awards System stakeholders. NSPI stakeholders are defined to include the following:

- NSPI members
- NSPI local chapters
- NSPI Advocates, Sustainers, and Patrons
- NSPI Treasured Members
- NSPI Board
- NSPI national office staff
- Customers (internal/external) of NSPI members
- Non-NSPI members working in the field (research, application, or management)

The NSPI Awards System itself is defined to include those systems, materials, practices, and people who are involved in the following, interrelated processes.

NSPI Awards System Architecture

The NSPI Awards System Architecture is presented below.
Project Overview

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The purpose of this project is to redefine and restructure the NSPI Awards System to meet the needs of NSPI Awards System stakeholders. NSPI stakeholders are defined to include the following:

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The NSPI Awards System itself is defined to include those systems, materials, practices, and people who are involved in the following, interrelated processes.

NSPI Awards System Architecture

The NSPI Awards System Architecture is presented below.
The intent of the three-tier Macroprocess Map is to systematically map a top-down view of processes, instead of the typical bottom-up view, which often leaves gaps and overlaps.

The products/services level consists of the mainstream processes of the organization. The other two levels help clarify the remaining nonmainstream processes into two categories.

- Leadership Processes – drive all processes
- Support Processes – serve and support the mainline process

The decision regarding which organization device to use in mapping the key processes is arbitrary. SWI uses this method to do the preliminary sort on processes within an organization.
Project Overview, Continued

Background

In 1989, the NSPI Board decided to undertake a study to revamp the NSPI Awards System. Kathleen Whiteside was asked to head a task force to analyze, plan, design, and implement these changes. The project was seen as a multiyear effort. As a result of the preliminary work:

- Responsibility for the chapter awards was moved to the chapter vice presidents.

- Awards were established for:
  - Contributions to the technology
  - Contributions to the Society

- The concept of criterion-referenced and norm-referenced awards was established.

In April 1992, Kathleen Whiteside asked Karen Wallace and Guy Wallace to assist in the development and refinement of the NSPI Awards System in a project management capacity.

Scope

The scope of this inherently complicated project includes:

- Analysis of the needs/desires of all of the stakeholders
  - Defining award types, categories, and criteria
  - Defining all the processes within the Awards System Architecture
  - Determining how historical awards data will be maintained
  - Ensuring that the processes are user friendly and efficient

- Establishment of benchmarks
  - The best-in-class products and processes (practices) to be used as criteria for HPT interventions (both instructional and noninstructional)
  - Recognition of research and publications advancing the technology (HPT)
  - Recognition/appreciation of volunteerism to the Society

- Design and development of a pilot-test version of the system
  - Design of a systems architecture for the NSPI Awards System
  - Development of all component materials and practices to be tested/evaluated prior to and in conjunction with the 1995 conference

continued on next page
Project Overview, Continued

Scope, Continued

- Pilot testing (beginning approximately March 1995 and concluding after the 1996 Conference’s award ceremony) and extensive evaluation of all pilot-test versions of all system components and practices
  - Evaluations to be conducted with all stakeholder groups by an independent group

- Revision of the system based on the evaluation data and planning for its overall implementation

The scope of the project does not include

- Establishing NSPI strategy (long or short term) or values

- Creating an official list of NSPI “Treasured Members” or providing them with any special recognition

- Continuously improving the award criteria to reflect best-in-class
  - Product and process benchmarks
  - Research methods
  - Publications
  - Volunteerism

- Planning the details of how the Society will fund and manage this effort or other efforts over the long run

These issues, while not part of this project’s scope, are seen as necessary inputs required to properly direct the project’s efforts. These inputs will be expected from either the NSPI Board or from the Project Steering Team, appointed by the Board.

Approach

The original overall goal was to engage as many members of the Society as possible in the project in an effort to achieve deployed imperfection rather than deferred perfection. Volunteer participants were to be organized into well-defined teams to work toward Integrated Product Development (IPD), which is an effective method of completing tasks within a shorter period of calendar time.

continued on next page
Project Overview, Continued

Approach, Continued

A new approach was deemed necessary due to the lack of volunteers (making the original team approach to system design impossible). Without the use of teams, the amount of calendar time required to complete the project in its current state increases remarkably.

Consequently, it was necessary to take a new approach. The following sections include our accomplishments to date and the project's next steps.

Accomplishments to Date

The project is being conducted in six phases.

<table>
<thead>
<tr>
<th>Phase 1</th>
<th>Phase 2</th>
<th>Phase 3</th>
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<th>Phase 5</th>
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<tbody>
<tr>
<td>Project Planning and Kick-off</td>
<td>Analysis</td>
<td>Design</td>
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(This model is an adaptation of the SWI • Svenson & Wallace, Inc. PACTSM Process, used for project planning and management purposes for Custom Course Development projects. It is used with permission.)

Phase 1: Project Planning and Kick-off – The following are achievements of Phase 1.

- The Project Plan was reviewed/revised phase-by-phase by the Steering Team and approved.
Dick Lincoln drafted a preliminary values statement for the project.

The National Society for Performance and Instruction (NSPI) is committed to identifying and rewarding exemplary performance in all aspects of Society activity—leadership, technology enhancement, and service. Recognition of exemplary performance is extended to all Society members regardless of their work-setting, membership status, or personal characteristics.

The primary means of accomplishing such recognition is the NSPI Awards System. By means of this System, the Society will set standards for excellence, create models for practitioners of the technology, provide reinforcement to exemplary performers, and define for its members and other stakeholders what the Society values in the field of performance improvement.

• Miki Lane developed a communication plan that suggests the use of
  - The current NSPI publications
    - News & Notes – “NSPI Redesigns its Awards System” was published in the July 1993 issue
    - Performance and Instruction Journal
    - Performance Improvement Quarterly
  - The monthly communication from national to chapter presidents
  - The national convention

• Kathleen Whiteside appointed Mark Greene as the Analysis Team leader, and he accepted the assignment.

• 1993 Conference activities relating to the Awards System Redesign were as follows:
  - Awards System Redesign posters were displayed.
  - Solicitation packages for volunteer team leaders and team members were distributed, as was an article on the redesign project.
  - A cracker-barrel table was conducted.
  - Displays were set up in the NSPI booth and the SWI booth.
  - A meeting of Lifetime Members/Past Presidents was held at which the project activities were discussed, questions were answered, and feedback and future assistance were solicited.

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Accomplishments to Date, Continued

Once the 1993 conference was over, Phase 1 – Project Planning and Kick-off was complete.

Phase 2: Analysis – The following are achievements of Phase 2 to date.

- Mark Greene, in his role as Analysis Team leader, developed a preliminary list of core values to be celebrated by the implementation of the redesigned NSPI Awards System.

- Phone interviews were conducted by the Project Management Team with NSPI key sources.

- The collected data was organized and forwarded to Mark Greene and Kathleen Whiteside as a progress report.

- The Project Management Team analyzed the Round 1 analysis data.

- From the Round 1 analysis data, the Round 2 data collection sheet was sent with instructions to 116 NSPI members.

- The results were collected and analyzed by the Project Management Team. The output of the analysis was the refined list of four core values.

- The Analysis Phase data and the straw model of the Awards System Macrodesign were compiled into this Analysis Report and distributed for review by phase participants.

Next Steps

The following lists the remaining project phases and next steps toward project completion.

Phase 3: Design – The following tasks are included in the Design Phase:

- Form a Design Team to
  - Review/approve the macrodesign that was created by the Project Management Team
  - Develop microdesign details
  - Design system metrics

continued on next page
Next Steps, Continued

- Project Management Team creates a Design Document and distributes it to the NSPI Board, the Project Steering Team, and others as directed by the Board.

Phase 4: Development – The following tasks are included in the Development Phase:

- Develop the new NSPI Awards System, including the Process Maps, forms, materials, training, etc. as necessary for each of the following detailed processes:
  - Awards Marketing and Promotion Process
  - Nomination Process
  - Awards Category and Best-in-Class Practices Benchmarks Policy Process; Continuous Improvement
  - Screening and Evaluation Process
  - Evaluator Selection/Training and Certification Process
  - Awards Presentation Process

Phase 5: Pilot Test – The following tasks are included in the Pilot Phase:

- Create pilot plan.
- Provide feedback on pilot.

Phase 6: Revision, Release, and Implementation Planning – The following tasks are included in the Revision, Release, and Implementation Planning Phase:

- Revise pilot Awards System based on feedback from pilot.
- Implement redesigned NSPI Awards System.

Next Steps Process Map

The following Process Map details the tasks, responsibilities, and timing elements of this new approach.
Conduct analysis efforts

- Create Analysis/Macrodesign Report
- Review Macrodesign
- Develop Microdesign
- Develop New Awards System
- Create Pilot Plan
- Conduct/Participate in Pilot Awards System
- Revise Pilot Awards System

- Provide Feedback on Pilot
- Implement Redesigned NSPI Awards System

Time:
- 4/94
- 12/15/94
- 1/6-7/95
- 2/15/95
- 4/95
- 4/96
- 6/96
Project Overview, Continued

Project Teams

The following are the teams, roles, and participants in this project.

Steering Team – The Steering Team’s primary responsibility is to review and approve all project outputs prepared by the project teams.

Kathleen Whiteside is the chairperson of this team. Other team members are identified below.

- Bonnie Abney
- Ruth Ashley
- Lani Fukazawa
- Dick Lincoln
- George Pollard
- Guy Wallace
- Kathleen Whiteside
- Roger Addison
- Dale Brethower
- Miki Lane
- Anne Mercer
- Donald Tosti
- Karen Wallace

Project Management Team – The Project Management Team’s primary charge is to plan and manage the project and publish all findings and results. In addition, the team conducted the Awards System Macrodesign detailed in Tab III of this report.

Project Management Team members are listed below.

- Karen Wallace
- Ray Svenson
- Kelly Rennels
- Guy Wallace
- Dottie Soelke

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Project Overview, Continued

Project Teams, Continued

Analysis Team – The Analysis Team conducted all Analysis Phase tasks that are detailed in Tab II of this report.

The Analysis Team chair is Mark Greene. Analysis Phase participants are identified below.

- Roger Addison
- Barbara Bichelmeyer
- Bill Coscarelli
- Diane Dormant
- Shelly Garrigus
- Tom Gilbert
- Judith Hale
- P. Kenneth Komoski
- Daniel Kuhn
- Seth Liebler
- Robert Mager
- Hanna Mayer
- Rich Pearlstein
- Carol Robinson
- Allison Rossett
- Harold Stolovich
- Carol Valen
- Joseph Yaney
- Jay Alden
- Barry Boothe
- Rosalind Cowie
- Robert Gagne
- George Geis
- Joe Harless
- Susan Holly
- Erica Keeps
- Danny Langdon
- Dick Lincoln
- Susan Markle
- Margo Murray
- Bob Powers
- Marc Rosenberg
- Nick Sanders
- Deborah Stone
- Kathleen Whiteside

Award Conversion Team – The Analysis Conversion Team is responsible for conducting the conversion of the Awards System to criterion referenced.

- Carol Valen
- To be added
Analysis Phase Overview

Goals and Objectives

The goals and objectives of this phase were to

- Conduct an analysis of the needs of the stakeholders related to the NSPI Awards Process
- Generate a straw model of the Awards System, including
  - Initial concepts of the categories for awards
  - Evaluation benchmarks or criteria to be used
  - Macrodessign specifications for the overall process mechanics of the system
- Compilation of data into an Analysis Report for distribution
- Article in P&J Journal
- Project Plan (update) for detailed design, development, and implementation
Analysis Phase Overview, Continued

The Analysis Process, structured by Mark Greene, started with the NSPI Statement of Values and ended with a refined list of four core values. The flow is illustrated in the model below.

1. Evaluate NSPI Statement of Values
2. Evaluate Preliminary Value Statement for the Awards Redesign Project
3. Identify and Evaluate 17 Core Values
4. Conduct First Round Analysis
5. Conduct Second Round Analysis
6. Analysis Results: Four Core Values
Analysis Process Details

Preliminary Analysis
At the start of the project, no models existed to illustrate the current view of the Awards System. The Project Management Team created the preliminary *NSPI Awards System Architecture* and the *NSPI Awards System Macroprocess Map* to be used to illustrate the structural view of the systems/processes of the Awards System.

First Round Analysis
The *NSPI Statement of Values*, provided by Stephanie Jackson, was used as an input to the development of the *Preliminary Value Statement for the Awards Redesign Project* and the list of 17 *NSPI Awards System Core Values*.

In the first round of analysis, the *NSPI Awards System Core Values* were sent to the following NSPI key sources for review and feedback:

- Roger Addison
- Jay Alden
- Barry Boothe
- Bill Coscarelli
- Rosalind Cowie
- Diane Dormant
- Robert Gagne
- George Geis
- Tom Gilbert
- Joe Harless
- Erica Keeps
- Danny Langdon
- Seth Liebler
- Dick Lincoln
- Bob Mager
- Hanna Mayer
- Margo Murray
- Rich Pearlstein
- Bob Powers
- Carol Robinson
- Marc Rosenberg
- Allison Rossett
- Harold Stolovitch
- Deborah Stone
- Carol Valen

Phone interviews were conducted to collect feedback. Key sources were asked to

- Modify or delete any items from the core values list as they felt appropriate.
- Add items to the list as they felt necessary.
- Indicate which three of the items were most important to celebrate in the NSPI Awards System.
- Discuss their level of awareness and reactions to the current awards system.
- Offer further input/suggestions regarding the design effort.

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Analysis Process Details, Continued

**First Round Analysis, Continued**

The Project Management Team analyzed the data to refine and modify the list of core values. This resulted in four proposed core values.

- Effective application of Human Performance Technologies in the workplace that will enhance productivity and benefit society
- Advancement of Human Performance Technologies through scholarship, innovation, and practices
- Consistent application of professional and ethical standards in the work we do
- Continuous professional development of members

Note: The analysis data gathered in Round 1 is located in Appendix B.

**Second Round Analysis**

In the second round of analysis, the list of the four proposed core values was sent to 116 people for review and comments. Reviewers included:

- Original interviewees/NSPI Key Sources
- Honorary Life Members
- Charter Life Members
- Chapter officers (for dissemination to chapter)

Out of the 116, the following 19 people responded:

Jay Alden Chair, Info Strategy Department IRM College
Barbara Bichelmeyer President Kansas City NSPI Chapter
H. Rosalind Cowie Special Assistant U.S. General Accounting Office
George L. Geis Professor Ontario Institute of Studies in Education
Judith A. Hale President Hale Associates

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Analysis Process Details, Continued

Round 2 feedback was collected primarily via fax.

The Project Management Team analyzed the data and found that there was very strong agreement on all four of the proposed core values.

The specific analysis results from Round 2 are detailed in Appendix B.
Findings and Conclusions

Findings Summary

Awards System core values should be reinforced by the Awards System.

- Narrowed from 17 to 4, they are
  - Effective application of Human Performance Technologies in workplace to enhance productivity and benefit society
  - Advancement of Human Performance Technologies through scholarship, innovation, and practices
  - Consistent application of professional and ethical standards in the work we do
  - Continuous professional development of members

- Nearly unanimous agreement among respondents

Awards Marketing and Promotion Process

Findings – The following findings and conclusions were reached about the awards Marketing and Promotion Process during the Analysis Phase.

- There is a major lack of marketing and promotion for the awards process, the awards themselves, and the finalists/winners, resulting in a loss of perceived value.

- There is a low return on investment compared to the effort required of the applicants and the reviewers.

- There are many good ideas among the members for improving awards marketing and promotion, e.g., as identified in Round 2 analysis.

- We don’t showcase awards well. There are no articles in professional journals, etc. We need to “do something” with the awards.

continued on next page
Findings and Conclusions, Continued

Awards Marketing and Promotion Process, Continued

Findings (continued)

- There's not enough information out there on the current awards system.

- There is no HPT Hall of Fame! How do we market HPT?

- We are marketing and promoting only within the NSPI member community.

Conclusions

- A stronger marketing and promotion process is required to
  - Promote NSPI.
  - Reinforce the values the Society places on the Awards System.
  - Increase level of participation inside/outside the Society.
  - Increase return on investment for the applicants and their organizations.

- Good things have been done in the past, but the application is inconsistent from year to year; no systematic continuous improvement process exists.

- We need a process that is in control to deliver a consistent set of marketing and promotional outputs year after year.

- There must be a focal point within the National Office (or some other organization) to administer and continuously improve the process.

Nomination Process

Findings – The following findings and conclusions were reached about the Nomination Process during the Analysis Phase.

- The process is complex, cumbersome, labor intensive, and costly.

- It discourages application by individuals and small businesses.

Conclusions

- The process needs to be re-engineered to
  - Increase participation.
  - Reduce burden on the applicants.
Findings and Conclusions, Continued

Screening and Evaluation Process

Findings – The findings and conclusions were reached about the Screening and Evaluation Process during the Analysis Phase.

• There is bipolar assessment of the following issues by the analysis participants:
  - Politicization
  - Consistent use of criteria
  - Consistency year to year

• Current system is labor and paperwork intensive.

• Applicants do not always receive feedback.

Conclusions

• Evolution and definition of evaluation criteria and its consistent, uniform use in assessment is out of control.

• The process needs to be re-engineered for consistency, clarity, efficiency, and continuous improvement of criteria and measurement technology.

• A clear statement of policy around norm- versus criteria-referenced assessment is needed.

Awards Category and Best-in-Class Practices

Findings – The following findings and conclusions about the Awards Category and Best-in-Class Practices Benchmarks Policy Process; Continuous Improvement were reached during the Analysis Phase.

• There has been a mixture of norm-referenced and criteria-based metrics.

• The current system awards the product, not the process,

• The measurement criteria and measurement technology are inconsistent from year to year.

• The award categories are not congruent with the newly defined awards core values.
  - Heavier emphasis on “I” rather than on the “P”

• Award category titles do not clearly communicate intent.

continued on next page
Findings and Conclusions, Continued

**Awards Category and Best-in-Class Practices Benchmarks Policy Process; Continuous Improvement, Continued**

**Conclusions**
- Categories need to fully support the new Awards System core values and reflect more Human Performance Technology interventions besides instructional technology.

- The process is a demonstration of the technologies and should be recognized directly; the product is one type of evidence of Human Performance Technology/quality processes.

- Need to clarify the role/use of criteria-referenced and norm-referenced metrics per award category (this has recently been addressed by the NSPI board).

**Findings**
The following findings and conclusions were reached about the Awards Presentation Process during the Analysis Phase.

- The awards banquet is used for more than the awards.
  - Change of officers
  - Speeches by officers and others
  - Skits

- The awards banquet has gotten long and punishing.

**Conclusions**
- If we go to criterion-referenced evaluation, need to decide if all applicants meeting the criteria will receive an award/recognition or just the norm-referenced “best.”

- The presentation of awards needs to be rationalized with the rest of the conference and banquet agenda.
  - To truly showcase the finalists and winners
  - Limit the discomfort of the participants

- This is really a component of the marketing and promotion process.
Findings and Conclusions, Continued

Evaluator Selection/Training and Certification Process

Findings – The following findings and conclusions were reached about the Evaluator Selection/Training and Certification Process during the Analysis Phase.

- Selection process and criteria for committee chairperson and marketing is not clear.

- There is no training or certification of evaluators to ensure reliability and validity (accurate, consistent results from one rater to another across samples).

- Some categories require technical expertise; there is no mechanism to define and select evaluators based on technical qualification.

Conclusions

- There needs to be a systematic process for selecting, training, and certifying evaluators based on appropriate criteria for each award category.

General Conclusions

- Need to deal with the perception by some (true or not) that the process is political.

- We do not know how to take advantage of and disseminate the lessons learned from the winners.

- It is too inwardly focused on NSPI.

- The entire system fails to exhibit a systematic application of our own technology.

- There is a general sense of mystery and lack of a clear, general understanding of the Awards System purpose and processes.

- We need to design a streamlined process that can be administered consistently, fairly, and cost effectively by the national offices and the awards committee and reduces the burden on all process participants.
  - National office staff
  - Awards committee members
  - Applicants
Macrodesign: NSPI Awards System

Introduction

The Awards System Macrodesign was created by the Project Management Team to be used as a straw dog for the Design Team to review, embellish, and finalize during the Design meeting scheduled to be held January 6-7, 1995 in the SWI offices.

The macrodesign was not intended to include detailed design of the processes within the NSPI Awards System. This detailed design will be conducted in the next project phase – Phase 3, Design.

The SWI Business Architecture Analysis Model was used in developing the Awards System Macrodesign (see the next page). The Business Architecture Model includes:

- Business Drivers
- Business Processes and Metrics
- Resource Infrastructure

Awards System Business Drivers

SWI used a methodology to define Business Drivers as a means of identifying requirements of Metrics and Processes. Business Drivers were segregated into three classifications.

- Assets and competencies
- Stakeholder requirements
- Marketplace and competitive factors

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The following table presents a high-level view of the Business Drivers of NSPI that should impact the Awards System redesign.

<table>
<thead>
<tr>
<th>Assets and Competencies</th>
<th>Stakeholder Requirements</th>
<th>Marketplace and Competitive Factors</th>
</tr>
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<tbody>
<tr>
<td>• Performance and instructional technologies</td>
<td>• NSPI international members</td>
<td>• Other societies and their awards sytems</td>
</tr>
<tr>
<td>• Society infrastructure</td>
<td>• NSPI Board</td>
<td>• ASTD</td>
</tr>
<tr>
<td>- HQ staff</td>
<td>• Local chapters</td>
<td>• ASQC</td>
</tr>
<tr>
<td>- Volunteers</td>
<td>• NSPI committees</td>
<td>• ETC.</td>
</tr>
<tr>
<td>• Membership expertise</td>
<td>• HPT community</td>
<td>• Applications marketplace</td>
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<td>- Standards bodies</td>
<td>• Research community</td>
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<td>- University</td>
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<td></td>
<td>- Other societies</td>
<td></td>
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<tr>
<td></td>
<td>- Etc.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The press</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The HPT customer community</td>
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</tbody>
</table>

The Awards System will be evaluated using the following performance measures:

- Stakeholder requirements (as reflected in the stated principles)
- Cost
- Cycle times
- Enhancement of NSPI reputation (inside and outside NSPI membership)
Overview of NSPI Processes

This is the Project Management Team's view of the NSPI processes. The purpose for including this view is to show where in the overall view of things the Awards System fits.

The intent of the three-tier structure is to systematically map a top-down view of processes, instead of the typical bottom-up view, which often leaves gaps and overlaps.

The products/services level consists of the mainstream processes of the organization. The other two levels help clarify the remaining nonmainstream processes into two categories.

- Leadership Processes – drive all processes
- Support Processes – serve and support the mainstream processes

The organization device to be used is arbitrary. This is the method/device SWI uses to do the preliminary sort of processes within an organization. Whether this view is subscribed to or not, it will force the Design Team to deal with potential interface issues.
Macrodesign: NSPI Awards System, Continued

Awards System Infrastructure

In an effort to identify key requirement elements of the Awards System infrastructure, SWI used its typical methodology of sorting requirements into two categories.

- Human Resource Infrastructure Requirements
- Environmental Resource Infrastructure Requirements

Human Resource Requirements – Human Resource requirements within an infrastructure include

- Knowledge
- Skills
- Attributes (physical, psychological)
- Values

The human elements within the NSPI Awards System include

- Awards Team
- Human resource staff
- Award finalists/winners
- Evaluators

Environmental Resource Requirements – The environmental elements within the NSPI Awards System include

- Awards organization structure
- Information database
  - Results and feedback data
  - Submissions
  - Change records
- Submissions resources sharing
  - Submissions materials
  - Evaluation records
- Administrative manuals
  - Process Maps
  - Procedures
  - Etc.

continued on next page
Macrodesign: NSPI Awards System, Continued

Awards System Infrastructure

- Forms
- News release and communication file
- Awards, certificates, plaques, etc.
- Instrument portfolio

Awards System Purpose/Mission

Dick Lincoln drafted a preliminary values statement for this project that states the purpose/mission of the Awards System.

The National Society for Performance and Instruction (NSPI) is committed to identifying and rewarding exemplary performance in all aspects of Society activity—leadership, technology enhancement, and service. Recognition of exemplary performance is extended to all Society members regardless of their work-setting, membership status, or personal characteristics.

The primary means of accomplishing such recognition is the NSPI Awards System. By means of this System, the Society will set standards for excellence, create models for practitioners of the technology, provide reinforcement to exemplary performers, and define for its members and other stakeholders what the Society values in the field of performance improvement.

Awards System Principles

The Project Management Team created the Awards System macrodesign in alignment with these principles:

- Fairness (independent, valid, and reliable rating, nonpolitical)
- Accessible to applicants (time and cost)
- Aligned with all NSPI values
- Balance of performance and instruction
- Nonbureaucratic process (cost and cycle time)
- Defined processes that are in control, stable, and maintained
- Criteria-referenced awards reflect best-in-class
- Norm-referenced awards reflect top performers
Macrodesign: NSPI Awards System, Continued

Awards System Inputs  The key inputs to the Awards System include the following:
- Best-in-class Human Performance Technology practices
- NSPI strategic plan and values, operational plans
- NSPI structure and roles
  - HQ
  - Board
  - Committees
  - Local chapters
  - Etc.
- Stakeholder requirements and feedback
- Data on other society award systems

Awards System Outputs  Key Awards System outputs include the following:
- Awards
- Publicity/information releases
- Best practices resource/sharing

Awards System Roles  The roles within the Awards System are identified below.
- Evaluator
- Awards Committee chair
- Awards Committee structure
- NSPI Board
- Nominees/customers
- Nominator
Macrodesign: Awards System Key Processes

Key Awards System Processes

Six key processes were identified within the Awards System.

- Awards Marketing and Promotion Process
- Nomination Process
- Screening and Evaluation Process
- Awards Presentation Process
- Awards Category and Best-in-Class Practices Benchmarks Policy Process; Continuous Improvement
- Evaluator Selection/Training and Certification Process

The following diagram portrays the major in/out flows.
Macrodorn: Awards System Key Processes, Continued

Awards Marketing and Promotion Process
Macrodesign

Purpose – Provide awareness of the awards process, solicit nominations, provide recognition for winners, and support general marketing of NSPI.

Outputs
- Press releases to local papers, company communications departments, national magazines, and the press
- Articles in an annual publication dedicated to the awards and the winners
- Articles about the award benchmarks
- Articles about the winning products and project histories (how did they do it, what was the situation, etc.)
- Publications used to promote the Society to executive management of human resources and quality organizations
- Demonstrations and showcases
- Recognition for evaluators and their qualifications
- Awards system change notifications to stakeholders

Inputs
- Award winners
- Award submissions
- Award categories and criteria
- Budget
- Stakeholders list and their requirements
- Feedback on the Awards System from the Awards Category and Best-in-Class Practices Benchmarks Policy Process
- Volunteers as assigned from Awards Committee

continued on next page
Macrodense: Awards System Key Processes, Continued

Awards Marketing and Promotion Process
Macrodesign, Continued

Performance Measures
- Stakeholder awareness of system and processes
- Stakeholder – satisfaction with publicity
- Awareness of access to Best Practices Resource Sharing
- Recognition for process participants
- Cost (dollars and time)
- Cycle time
- Number of nominations

Nomination Process
Macrodesign

Purpose – Complete and forward nomination applications with data sufficient for initial screening.

Outputs
- Completed Nomination Forms (per category)
- Acknowledgment of receipt
- Notice to nominees (if not nominator)
- Agreement by nominees to compete (if not nominator)
- Nomination statistics

Inputs
- Publicity and requirements around nominating categories and process
  - Category definition
  - Criteria
- Nomination Forms per category
- Volunteers as assigned from Awards Committee

Performance Measures
- Easy to use (cost and cycle time to nominator); easy to interpret
- Enables objective, timely processing

continued on next page
### Macrodesign: Awards System Key Processes, Continued

<table>
<thead>
<tr>
<th>Screening and Evaluation Process</th>
<th>Purpose</th>
<th>Outputs</th>
<th>Inputs</th>
<th>Performance Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Macrodesign</td>
<td>- Select the winners of awards.</td>
<td>- Initial screening results</td>
<td>- Completed nomination forms</td>
<td>- Reliability and validity of assessment to the criteria</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Identified candidates who meet best-in-class criteria (criterion referenced)</td>
<td>- Assessment criteria for award categories</td>
<td>- Stakeholder perception of fairness</td>
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<tr>
<td></td>
<td></td>
<td>- Identified (norm-referenced) best entry</td>
<td>- Trained, certified evaluators</td>
<td>- User (nominee, publicity, and presentation) satisfaction with information outputs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Notifications and feedback to all nominees</td>
<td>- Volunteers as assigned from Awards Committee</td>
<td>- Cycle time</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Notification to publicity process and awards presentation process</td>
<td>- Submission packages</td>
<td>- Cost</td>
</tr>
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<td></td>
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</tbody>
</table>

### Awards Category and Best-in-Class Practices

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Provide strategic and tactical direction measurement, stakeholder satisfaction, conduct results and provide continuous improvement.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outputs</td>
<td>- Category list and definitions</td>
</tr>
<tr>
<td></td>
<td>- Criteria for evaluation per category</td>
</tr>
<tr>
<td></td>
<td>- Outputs</td>
</tr>
<tr>
<td></td>
<td>- Process</td>
</tr>
<tr>
<td></td>
<td>- Results</td>
</tr>
</tbody>
</table>

*continued on next page*
Macrodesign: Awards System Key Processes, Continued

<table>
<thead>
<tr>
<th>Awards Category and Best-in-Class Practices</th>
<th>Outputs (continued)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benchmarks Policy</td>
<td>• Data on best-in-class practices</td>
</tr>
<tr>
<td>Process Continuous Improvement Macrodesign, Continued</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Evaluator certification criteria per award category</td>
</tr>
<tr>
<td></td>
<td>• Change system</td>
</tr>
<tr>
<td></td>
<td>• System audit results</td>
</tr>
<tr>
<td></td>
<td>• Results and evaluation data from all stakeholder groups</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Inputs</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Benchmark data on award processes (external to NSPI)</td>
</tr>
<tr>
<td>• Benchmark data on best Human Performance Technology practices</td>
</tr>
<tr>
<td>• Classification of Human Performance Technology services and products</td>
</tr>
<tr>
<td>• Awards System values</td>
</tr>
<tr>
<td>• Feedback from stakeholders</td>
</tr>
<tr>
<td>• Change request forms</td>
</tr>
<tr>
<td>• Volunteers as assigned from Awards Committee</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Performance Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Stakeholder requirements met</td>
</tr>
<tr>
<td>• Cost</td>
</tr>
<tr>
<td>• Cycle time</td>
</tr>
<tr>
<td>• Perception of fairness</td>
</tr>
<tr>
<td>• Alignment with values</td>
</tr>
<tr>
<td>• Perception of true representation of best-in-class</td>
</tr>
<tr>
<td>• Balance of categories (P and I)</td>
</tr>
<tr>
<td>• Change requests addressed in a timely fashion</td>
</tr>
<tr>
<td>• Changes implemented in a timely fashion</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Awards Presentation Process Macrodesign</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose – Provide formal announcement and recognition of award recipients.</td>
</tr>
<tr>
<td>Outputs</td>
</tr>
<tr>
<td>• Award paraphernalia (plaques, letters, etc.)</td>
</tr>
<tr>
<td>• Public announcements at the conference</td>
</tr>
</tbody>
</table>

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Macrodesign: Awards System Key Processes, Continued

Awards Presentation Process

Macrodesign, Continued

<table>
<thead>
<tr>
<th>Inputs</th>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Identified winners</td>
<td>• Information on submissions from the screening and evaluation process</td>
<td>• Volunteers as assigned from Awards Committee</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Performance Measures

- Visibility to maximum number of conference participants
- Conference time consumed
- Percentage of recipients present for presentation
- Ability to exploit results during the conference

Evaluator Selection/Training and Certification Process

Macrodesign

<table>
<thead>
<tr>
<th>Purpose</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Select, train, and certify evaluators.</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Outputs</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Certified evaluators</td>
<td>• Selection instruments</td>
<td>• Training materials</td>
<td>• Certification instruments</td>
<td>• Certification/selection records</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Inputs</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Awards criteria per category</td>
<td>• Evaluator criteria per category</td>
<td>• Volunteers to serve as evaluator</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Performance Measures

- Validity and reliability of process to criteria
- Perception of validity and reliability (quality of the evaluators)
- Feedback from evaluators and evaluator candidates
- Cost
- Cycle time
NSPI Awards System
Redesign Project
Status Update

April 1994

prepared by:
Project Management Team
Dottie Soelke
Guy Wallace
Karen Wallace
PROJECT OVERVIEW

Purpose

The purpose of this project is to redefine and restructure the NSPI Awards System to meet the needs of NSPI Awards System stakeholders. NSPI stakeholders are defined to include the following:

- NSPI members
- NSPI local chapters
- NSPI Advocates, Sustainers, and Patrons
- NSPI Treasured Members
- NSPI Board
- Non-NSPI members working in the field (research, application, or management)
- Customers (internal/external) of NSPI members

The NSPI Awards System itself is defined to include those systems, materials, practices, and people who are involved in the following, interrelated processes:

NSPI Awards System Architecture

Background

In 1989, the NSPI Board decided to undertake a study to revamp the NSPI Awards System. Kathleen Whiteside was asked to head a task force to analyze, plan, design, and implement these changes. The project was seen as a multiyear effort. As a result of the preliminary work

- Responsibility for the chapter awards was moved to the chapter vice presidents.
Awards were established for
- Contributions to the technology
- Contributions to the Society

The concept of criterion-referenced and norm-referenced awards was established.

In April 1992, Kathleen Whiteside asked Karen and Guy Wallace to assist in the development and refinement of the NSPI Awards System in a project management capacity.

Scope

The scope of this inherently complicated project includes

- Analysis of the needs/desires of all of the stakeholders
  - Defining award types, categories, and criteria
  - Defining all the processes within the Awards System Architecture
  - Determining how historical awards data will be maintained
  - Ensuring that the processes are user friendly

- Establishment of benchmarks
  - The best-in-class products and processes (practices) to be used as criteria for HPT interventions (both instructional and noninstructional)
  - Recognition of research and publications advancing the technology (HPT)
  - Recognition/appreciation of volunteerism to the Society

- Design and development of a pilot-test version of the system
  - Design of a systems architecture for the NSPI Awards System
  - Development of all component materials and practices to be tested/evaluated prior to and in conjunction with the 1995 conference

- Pilot testing (beginning approximately April 1994, and concluding months after the 1995 conference’s award ceremony) and extensive evaluation of all pilot-test versions of all system components and practices
  - Evaluations to be conducted with all stakeholder groups

- Revision of the system based on the evaluation data and planning for its overall implementation

The scope of the project does not include

- Establishing NSPI strategy (long or short term)
- Creating an official list of NSPI “Treasured Members” or providing them with any special recognition
- Continuously improving the award criteria to reflect best-in-class
  - Product and process benchmarks
  - Research methods
  - Publications
  - Volunteerism
• Planning the details of how the Society will fund and manage this effort or other efforts over the long run.

These issues, while not part of this project's scope, are seen as necessary inputs required to properly direct the project's efforts. These inputs will be expected from either the NSPI Board or from the Project Steering Team, appointed by the Board.

ACCOMPLISHMENTS TO DATE

The project was to be conducted in six phases.

Phase 1: Project Planning & Kick-off – The following are achievements of Phase 1.

• The Project Plan was reviewed/revised phase-by-phase by the Steering Team and approved. The members of the Steering Team are

  - Bonnie Abney
  - Roger Addison
  - Ruth Ashley
  - Dale Brethower
  - Lani Fukazawa
  - Miki Lane
  - Dick Lincoln
  - Anne Mercer
  - George Pollard
  - Donald Tosti
  - Guy Wallace
  - Karen Wallace
  - Kathleen Whiteside

• Dick Lincoln drafted a preliminary values statement for the project.

  The National Society for Performance and Instruction (NSPI) is committed to identifying and rewarding exemplary performance in all aspects of Society activity—leadership, technology enhancement, and service. Recognition of exemplary performance is extended to all Society members regardless of their work-setting, membership status, or personal characteristics.

  The primary means of accomplishing such recognition is the NSPI Awards System. By means of this System, the Society will set standards for excellence, create models for practitioners of the technology, provide reinforcement to exemplary performers, and define for its members and other stakeholders what the Society values in the field of performance improvement.
Miki Lane developed a communication plan that suggests the use of:
- The current NSPI publications
  -- *News & Notes* – “NSPI Redesigns its Awards System” was published in the July 1993 issue
  -- *Performance and Instruction Journal*
  -- *Performance Improvement Quarterly*
- The monthly communication from national to chapter presidents
- The national convention

Kathleen Whiteside appointed Mark Greene as the Analysis Team Leader, and he accepted the assignment.

1993 Conference activities relating to the Awards System Redesign were as follows:
- Awards System Redesign posters were displayed.
- Solicitation packages for volunteer team leaders and team members were distributed, as was an article on the redesign project.
- A cracker-barrel table was conducted.
- Displays were set up in the NSPI booth and the SWI booth.
- A meeting of Lifetime Members/Past Presidents was held at which the project activities were discussed, questions were answered, and feedback and future assistance were solicited.

Once the 1993 conference was over, Phase 1 – Project Planning & Kick-off was complete.

Phase 2: Analysis – The following are achievements of Phase 2 to date.

- Mark Greene, in his role as Analysis Team leader, developed a preliminary list of core values to be celebrated by the implementation of the redesigned NSPI Awards System.

- Phone interviews were conducted by the Project Management Team with the following NSPI Key Sources.

```plaintext
Roger Addison  Joe Harless  Rich Pearlstein
Jay Alden      Erica Keeps  Bob Powers
Barry Boothe   Danny Langdon Carol Robinson
Bill Coscarelli Seth Liebler Marc Rosenberg
Rosalind Cowie Dick Lincoln Allison Rossett
Diane Dormant  Bob Mager    Harold Stolovich
Robert Gagne   Hanna Mayer  Deborah Stone
Tom Gilbert    Margo Murray Carol Valen
```

The interviewees were asked to
- Modify or delete items from Mark Greene's core values list as they felt appropriate.
- Add items to the list as they felt necessary.
- Indicate which three of the items were most important to celebrate in the NSPI Awards System.
- Discuss their level of awareness and reactions to the current awards system.
- Offer further input/suggestions regarding the redesign effort.

- The collected data was organized and forwarded to Mark Greene for further analysis and to Kathleen Whiteside as a progress report.

**APPROACH/PHILOSOPHY**

**The Original Plan**

The original overall goal was to engage as many members of the Society as possible in the project in an effort to achieve deployed imperfection rather than deferred perfection. Volunteer participants were to be organized into well-defined teams to work toward Integrated Product Development (IPD), which is an effective method of completing tasks within a shorter period of calendar time. The plan was to

- Select members from a volunteer pool who would serve on and/or lead teams.
- Structure the chain of command for these teams so that the stakeholders of the systems/processes have the greatest impact on the overall design.

**True Confessions**

The volunteer solicitation packages, distributed at the 1993 conference, consisted of four sections.

- Information for those interested in team leader positions, which included a three-page position description and an eight-page performance model
- Information for those interested in team member positions, which included a two-page position description and a four-page performance model
- A five-page knowledge/skill/trait requirements self-assessment summary questionnaire
- A request for references

The intention in asking for so much in the way of personal and professional qualification and commitment to the project was to literally scare away potential volunteers who could not devote the considerable amounts of time and effort required for the success of this project. We were successful in our effort; we scared away everyone!

The mission of the Project Management Team (Guy and Karen Wallace and recent addition to the team, Dottie Soelke) was to simply manage the project and report on its progress.
NSPI

AWARDS SYSTEM REDESIGN PROJECT

We fully intended to go forward with the project as it was mapped out in the original Project Plan and use our own resources, with or without volunteers.

Now it's time to eat a little crow. Our business at SWI • Sverson & Wallace, Inc. has grown tremendously during this past year, and it is continuing to grow. We, ourselves, no longer have the “considerable amounts of time” to devote to the NSPI Awards System Redesign as it is described in the Project Plan.

A New Approach

Our increased workload, in combination with the lack of volunteers, makes the team approach to system design impossible. Without the use of teams, the amount of time on the calendar required to complete the project in its current state increases remarkably.

Consequently, it’s necessary to look for another way. The following Process Map details the tasks, responsibilities, and timing elements of this new approach.
NSPI
AWARDS SYSTEM REDESIGN PROJECT
A NEW APPROACH

Conduct analysis of “Leading Lights” core values interviewee responses
Refine core values list and forward to Project Management Team
Analyze data and refine core values for use in straw model

Distribute refined list to members for consideration
Send collected data to Analysis Team
Create straw model based on refined core values list
Revise straw model

Review core values; indicate three most important; send feedback to Project Management Team
Review straw model and send feedback to Project Management Team
Conduct/Participate in Pilot Awards System

Provide feedback on pilot

Revise Pilot Awards System

Implement redesigned NSPI Awards System

Time

4/94 4/95 4/96 6/96

SWI • Svenson & Wallace, Inc. 3/25/94 Page 8
A New Approach (continued)

This change in approach, essentially a shorter process than the original approach, will still take some time. It will be necessary to wait until the '95-'96 year to pilot the redesigned system, the culmination of which will take place at the '96 Conference Awards Banquet.

The Project Management Team will publish regular project updates in News & Notes in an effort to keep the membership at large abreast of our progress.

Please feel free to contact Dottie Soelke with any questions, comments, or concerns regarding the NSPI Awards System Redesign project.

Dottie Soelke
Associate
SWI • Svenson & Wallace, Inc.
1733 Park Street, Suite 201
Naperville, IL 60563

708•416•3323 (voice)
708•416•9770 (fax)
Round 1 Analysis of NSPI Core Values

Every clan, group, society, or nation performs a periodic ritual. That ritual entails the selection of the “best of the best” or the “best of the brightest.” Such a selection affirms the values that underlie the organization. (For present purposes, values are defined as those principles, qualities, or standards that we consider worthwhile or desirable. Furthermore, core values represent the “basic set” of 10 to 12 [or fewer] values from which all others emanate.)

As a primitive society, we celebrated those values that promoted our survival (e.g., excellent hunting skills, great foot speed, etc.). Thus, in selecting our heroes then and now, we honor those who represent the embodiment of the values we prize.

The Awards System Redesign Task Force is reviewing the current approach to selecting NSPI’s heroes. Before we begin tinkering with the numbering system on the award applications and the point system used by the reviewers, it would be wise to consider the values that undergird the entire effort. Essentially, the following question needs to be asked:

What values do we choose to celebrate through our awards system?

A preliminary set of value statements is on the following page and has been developed as a precursor to our phone interviews with key NSPI stakeholders. As one of these stakeholders, we ask that you

- Review the value statements.
- Strike any that you believe are not core values for NSPI.
- Add items you consider to be essential.
- Limit your list to 12 items (if possible).
- Indicate which of the items on your list are among the top three in terms of importance.

Ray Svenson, Guy Wallace, Karen Wallace, or one of their associates will be contacting you by phone for your feedback.

Your expertise and help are greatly appreciated.
Thank you!
As an organization, we value...

a. The advancement of our technologies through conceptualization
b. The advancement of our technologies through innovation
c. The advancement of our technologies through scholarship
d. The advancement of our technologies through research
e. The advancement of our technologies through application
f. The development, demonstration, or dissemination of a proven innovation
g. The effective application of research-based technologies
h. The effective application of our technologies in solving real-world problems
i. The application of our technologies to the greater benefit of society
j. The application of professional and ethical standards in the work we do
k. The enhancement of productivity in the workplace
l. The professional development of our members
m. The preprofessional development of students
n. Actions that promote the preeminence of our Society among HR societies
o. The support of our Society through the provision of resources
p. The safety of our Society through appropriate use of fiscal resources
q. The expansion of our Society through growth of membership
## Round 1 Analysis Interview Results

**NSPI Core Values**

<table>
<thead>
<tr>
<th>Item</th>
<th>Retain</th>
<th>Item</th>
<th>Delete</th>
<th>Item</th>
<th>Retain/Modify</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>B</strong></td>
<td>The advancement of our technologies through innovation</td>
<td><strong>A</strong></td>
<td>The advancement of our technologies through conceptualization</td>
<td><strong>C</strong></td>
<td>The advancement of our technologies through scholarship</td>
</tr>
<tr>
<td><strong>F</strong></td>
<td>The development, demonstration, or dissemination of a proven innovation</td>
<td><strong>G</strong></td>
<td>The effective application of research-based technologies</td>
<td><strong>D</strong></td>
<td>The advancement of our technologies through research</td>
</tr>
<tr>
<td><strong>H</strong></td>
<td>The effective application of our technologies in solving real-world problems</td>
<td><strong>P</strong></td>
<td>The safety of our Society through appropriate use of fiscal resources</td>
<td><strong>E</strong></td>
<td>The advancement of our technologies through application</td>
</tr>
<tr>
<td><strong>I</strong></td>
<td>The effective application of our technologies to the greater benefit of society</td>
<td><strong>Q</strong></td>
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<td><strong>M</strong></td>
<td>The preprofessional development of students</td>
</tr>
<tr>
<td><strong>J</strong></td>
<td>The application of professional and ethical standards in the work we do</td>
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<td><strong>N</strong></td>
<td>Actions that promote the preeminence of our Society among HR societies</td>
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<tr>
<td><strong>K</strong></td>
<td>The enhancement of productivity in the workplace</td>
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<td></td>
<td><strong>O</strong></td>
<td>The support of our Society through the provision of resources</td>
</tr>
<tr>
<td><strong>L</strong></td>
<td>The professional development of our members</td>
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</table>
NSPI AWARDS SYSTEM REDESIGN PROJECT

Round 1 Interview Responses
Current State vs. Future State

THE AWARDS MARKETING AND PROMOTION PROCESS

Reaction to Current System

• We don’t showcase awards well. There are no articles in the professional journals, etc. We need to “do something” with the awards.

• Maybe we should ask finalists to market the awards program (and provide them tools with which to do the marketing).

• There’s not enough information out there on the current awards system.

• Where is our HR Hall of Fame? How do we market it?
Further Input/Suggestions

- Publish special issues in the *P & I* and other trade journals after the conference to advertise the awards process and the award-winning products. Allison Rossett’s book on job aids and Bob Powers’ book could be of use to people and organizations in our field - even those who aren’t NSPI members.

- Think about instituting an “NSPI Seal of Approval” to be used on award-winning products, e.g., the Rossett book, the Powers book. The “Seal” fulfills a two-fold advertising goal; it reminds people of the value of NSPI and it sells product.

- Promote interventions that are non-training, even though they are less tangible.

- Communicate the specifics of the awards system more widely. It should be included in the annual directory with the By-Laws.

- Provide results of awards process more broadly than just at the annual conference. Give the general membership a chance to react to the awards, even if they don’t attend the conference. (We need to realize that only a percentage of members attend the conference.) For instance, publish a series (not just a one-time mention) of articles on the awards system and award winners in the *News & Notes*.

- The current system is pretty good but Bob would like to see the *P & I Journal* carry articles on the awards finalists (“like they used to”). Highlighting the award winners during an evening at the conference is a “wonderful way to give attention to the awards.”

- Do a better job of publicizing NSPI award winners. Otherwise, there’s no payback for going through the trouble to submit. Celebrate award winners in the HPT field, not just within NSPI.
THE NOMINATION PROCESS

Reaction to Current System

- The current system is very labor intensive.
- The system is very effective in terms of making people do things to get the awards.
- In reality, NSPI awards are now only for large organizations because they have more resources to devote to the substantial documentation. This cuts out small businesses entirely, as does the Baldrige.
- It's a lot of work to submit products. Products that have won are good, but those who are good at HPT are systems people; systems people are (by their nature) good at figuring out awards systems.
- Complexity causes people that don’t get paid to submit.
- Limit the number of submissions.
Further Input/Suggestions

- Decrease the amount of labor involved in the redesigned system. Don’t make it more difficult than it is now.
- Include non-members in the process.
- Change the conference proposal process; streamline it and work more closely with the national office.
- Simplify and make the system more equitable. Reduce the paperwork.
- NSPI should charge an administration fee for each product submitted for an award - $25 to $30. Other organizations do this.
THE AWARDS CATEGORY AND BEST-IN-CLASS PRACTICES BENCHMARKS POLICY PROCESS

Reaction to Current System

- Changes creep in every year that loosen the “measured results” perspective. Bring the redesigned system criteria back closer to the mission statement. Attempt to remove subjectivity and move toward objectivity.

- The categories don’t make sense and the criteria are hazy; the categories and the criteria are out of sync.

- The criteria aren’t bad; it’s the mechanism that’s the problem.

- Rich is dissatisfied with the current system. Not enough attention is paid to research; one of his campaign promises (when running for Vice President of R&D) was to pay more attention to research. He hasn’t fulfilled this promise because the board asked him to wait until SWI completed the awards redesign.

- With regard to our work on the awards system as well as award-winning products, is it the effort we value (and therefore award) or is it the product/intervention/result we value?

- The "Life Members" (Honorary/Charter) awards are good because they require the unanimous approval of two of the executive boards.

- The Distinguished Service Award is good but adding Thiagi at the last minute last year was not appropriate. If we wanted to show our appreciation of Thiagi, we should have made a separate award.
Further Input/Suggestions

• The redesigned awards system should be criterion referenced like the chapters' awards are.

• The categories, procedures (least important), policies, criteria, etc., need to be explicit, “fixed and finite” for a while – at least ten years. The people involved change, but the system should not.

• If we were starting over, I would create awards categories and administrative recognition categories for Society officers, committee chairs/members, etc. But don’t use this as input to the redesigned system.

• Recognize the elderly.

• Recognize educational institutions.

• Award programs that meet minimum standards.

• Consider changing the “Outstanding Instructional Communication” award to the “Book of the Year” award.

• Call things what they are, e.g., books, articles.

• What about celebrating “brilliance vs. touching all bases?”

• Institute a Professional Practice Award.

• Create an HRD Hall of Fame.

• Reduce the number of awards.
THE SCREENING AND EVALUATION PROCESS

Reaction to Current System

- The current system is very labor intensive.
- The current awards system is not political.
- Committee members work hard and they do use the prescribed criteria.
- The current system is a good peer evaluation process and in terms of the awards we have defined, it is fair and provides a good set of checks and balances.
- The current system seems to work loosely and in two parts: ① Selecting the winners and ② Presenting the awards. Bill has heard no complaints about the selection process and results.
- There is no “institutional memory.” People on last year’s committee simply say, “Here are our rating sheets, do what you can.”
- The awards are administered inconsistently from year to year.
- The criteria aren’t bad; it’s the mechanism that’s the problem. There’s too much paper to disseminate and review.
- She didn’t always agree with the choices but that’s not really fair to say if one hasn’t been involved in the decision-making process.
Reaction to Current System (continued)

• The problem is, the awards committees can't survey everything that's out there. Consequently, they (the awards committee members) only know about members who chose to promote themselves and their own products.

• The current awards system is linked to the NSPI mission statement but is not successful operationally. It seems to be an exercise in how to win an award rather than recognition of quality intervention(s).

• The current awards process is a burden.

Further Input/Suggestions

• Decrease the amount of labor involved in the redesigned system. Don't make it more difficult than it is now.

• Provide feedback on submissions only if submittees request it.

• From an administrative standpoint, the copies of nominations documentation should be sent to headquarters, not to the individuals who are running the awards.

• Simplify and make the system more equitable. Reduce the paperwork.
THE EVALUATOR SELECTION/TRAINING AND CERTIFICATION PROCESS

Reaction to Current System

• How do the committee members get selected and is there a better way to select them?
• It's a good peer review.
• He doesn't understand how the committee chairs are selected.

Further Input/Suggestions

• A prerequisite for committee chairpersons should be previous participation on committees.

• Committee members should be diverse, but qualified. Also, with regard to committee members, open up the procedure and ask for interested people to contact the appointed committee chairpersons. This could be done at the annual conference.

• Have senior people do the reviews.
THE AWARDS PRESENTATION PROCESS

Reaction to Current System

• The current system seems to work loosely and in two parts: ① Selecting the winners and ② Presenting the awards. Bill has heard no complaints about the selection process and results, but the finalists need more visibility. As far as the presentation itself, the banquet is too long.

• The awards banquet gets bogged down with the presentation process. Also we need to include new conference attendees somehow. As a rule, 1/3 to 1/2 of the conference attendees are newcomers.

• The awards ceremony needs to more thought out before the banquet.

• The banquet and awards ceremony are punishing for everyone but the winners.

Further Input/Suggestions

• Most importantly, the criteria will change over time, but all the candidates should be treated better. Pay more attention to the candidates.

• Take out some of the information in the Awards Banquet, e.g., the introductions. There is “so much garbage” that people are “bored to tears.”
ADMINISTRATIVE ISSUES

Reaction to Current System

• Seth’s perception of how the current system works is that it’s “a great mystery.” “Each year the yodeler comes down from the mountain and says, ‘these are the awards!!!’ ”

• Are the awards for NSPI members only?

Further Input/Suggestions

• The system should be maintained at headquarters for the sake of consistency and headquarters is understaffed as it is so maintenance is a real issue.

• The system needs clear definition.
GENERAL CORE VALUES/REDESIGN ISSUES

Reaction to Current System

- Jay's not interested enough to have great concerns with the system in general. He doesn't know how important it is to the Society. Reinforcing outstanding products and procedures is good, but do we reinforce development of portable strategies? That is, do we celebrate strategies that can be used by other members of NSPI?

- It appears that this list was made up by what we are already about, but it doesn't reflect NSPI's mission which is centered around "improved performance of humans through application of performance technologies."

- These core values are too "wishy-washy" and should be stated in simpler language. The list of core values embodies elements of what the core values should be.

- Start over.

- The current system needs rework/redesign and Dick is happy we're doing it. The awards system is the "mother's milk of our Society." The changes being made by Kathleen, Karen, and Guy are "laudatory."

- One of the results of the awards system is to create winners and losers. Recognition of outstanding contributors to the field should be handled better. The whole thing (awards system) is kind of arbitrary.
Reaction to Current System (continued)

- There's too much emphasis on our own products and the Society, while it subscribes to certain values, it's merely people within the Society who value it. What we should be asking is, "Who outside of the Society can use the product/intervention?" There's too much inward focus in NSPI. We are not seeking external demonstrations of products. We, as an organization, do not survey the workforce for innovations and/or successful interventions. These innovations/interventions should be celebrated whether the authors are members of NSPI or not.

- The "core values" are "muddy" because there is so much overlap. The overlap made it difficult to evaluate this list.

Further Input/Suggestions

- The Awards System core values should parallel the NSPI ethics core values. The values also need to measure up to the NSPI mission statement and we need to keep in mind NSPI 2000.

- We need to move away from the "club" atmosphere.

- Design a "Mercedes" of awards systems.

- Given the significant fall off of volunteerism, rely less on volunteer resources and more heavily on resources at the national office.

- Don't do anymore surveys. Rely on the information gleaned from the phone interviews you have done with key NSPI resources, review and evaluate the information, and design a straw model of an awards system.
Further Input/Suggestions (continued)

- We need to speak to the quality movement instead of productivity issues. "People recognize quality
  issues. HPT makes "people's eyes glaze over."

- Joe supports what we're doing. He can see the link between what should be core values and the awards
  system. However, the Mark Greene list of is one of goals, not "core values." He would replace Mark's
  list with a list that includes the following.

As an organization, we value...

a. Human performance as the key to successful society and organizations
b. Research and development of humanistic and cost-effective ways of influencing human performance
c. Scientific and research bases for procedures and methods
d. Ethical behavior of members of our field
e. Continued professional development of members of our field

- Joe would modify the (Mark Greene) list of what he calls "goals" and suggests we work at making the
  items more specific.

- Mr. Harless knows what we're going through because of the struggle the Ethics Committee has been
  going through. A Code of Ethics for NSPI assumes a Code of Ethics for the field of HPT. It's the
  same with core values—we should be concerned with the core values for the field of HPT in general
  (not NSPI specifically). Joe urges us to grapple with this dilemma.

- NSPI is a subset of performance technology, not vice versa. It exists to support the values of the HPT
  field.
Further Input/Suggestions (continued)

- The awards system should be member-driven, not top-down-driven.

- If there will be “new rules” on how the awards submissions will be evaluated, they should be more consistent than in the current system.

- Dick will be available at the conference in April to spend some time talking about the redesign effort.

- What is the purpose of the core values statement?

- There are too many “core values.” Values stated at such a high level are rather abstract. NSPI's core values should be operational, not abstract.

- This is all really “motherhood and apple pie.”

- What does the phrase “our technologies” mean? The core value statements need to be clearer regarding the direction of NSPI as a whole.

- I'd like the organization to be “as good as we used to be.”

- We should be valuing development.

- SWI has covered all the bases at least in the documentation he has seen to date. Rich suggests we ask Stephanie Jackson to send us a copy of the board-approved values statement for NSPI that the ethics committee developed.
Further Input/Suggestions (continued)

- Carol doesn't know where the redesign effort stands at present. She does know, however, that we need manpower to pull it off and NSPI structure to administer the system effectively.

- She questions whether or not we want to spend resources and effort to have it not go anywhere. The intentions are good, but Carol is worried about whether anything will come of it.

- We sell only two things – our knowledge and our time. Both those things are based on scholarship, research, and the ability to apply them.
<table>
<thead>
<tr>
<th>Proposed NSPI Award System’s Core Values</th>
<th>Agree</th>
<th>Disagree</th>
<th>Suggested Goals for the Award System’s Proposed Core Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective application of Human Performance Technologies in the workplace that will enhance productivity and benefit society</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advancement of Human Performance Technologies through scholarship, innovation, and practices</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consistent application of professional and ethical standards in the work we do</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Continuous professional development of members</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comment(s):
### Proposed NSPI Awards System Core Values Analysis Results Summary

<table>
<thead>
<tr>
<th>Proposed NSPI Awards System Core Values</th>
<th>Agree</th>
<th>Disagree</th>
<th>Modify</th>
<th>No Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective application of Human Performance Technologies in the workplace that will enhance productivity and benefit society</td>
<td>13</td>
<td>1</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Advancement of Human Performance Technologies through scholarship, innovation, and practices</td>
<td>15</td>
<td>0</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Consistent application of professional and ethical standards in the work we do</td>
<td>18</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Continuous professional development of members</td>
<td>16</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>
NSPI AWARDS SYSTEM REDESIGN PROJECT

Round 2 Analysis of NSPI Core Values
Analysis Results

Some of the respondents suggested specific modifications. These are detailed below.

<table>
<thead>
<tr>
<th>Proposed NSPI Award System's Core Values</th>
<th>Suggested Modification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective application of Human Performance Technologies in the workplace that will enhance productivity</td>
<td>Effective application of Human Performance Technologies in the workplace that will solve</td>
</tr>
<tr>
<td>and benefit society</td>
<td>problems, enhance productivity, and benefit society</td>
</tr>
<tr>
<td></td>
<td>Application of Human Performance Technologies in the workplace in order to enhance productivity</td>
</tr>
<tr>
<td></td>
<td>Effective application of Human Performance Technologies in the workplace that will enhance productivity</td>
</tr>
<tr>
<td></td>
<td>(Respondent disagreed with this core value, but suggested it should be reworded as follows.)</td>
</tr>
<tr>
<td></td>
<td>Effective application of Human Performance Technologies in the workplace, community, and other areas of endeavor to enhance productivity and benefit society</td>
</tr>
<tr>
<td>Advancement of Human Performance Technologies through scholarship, innovation, and practices</td>
<td>Advancement of Human Performance Technologies through scholarship, innovation, and practices and research</td>
</tr>
<tr>
<td></td>
<td>Advancement of Human Performance Technologies through scholarship, innovation, and exemplary practices</td>
</tr>
<tr>
<td></td>
<td>Advancement of Human Performance Technologies</td>
</tr>
<tr>
<td>Consistent application of professional and ethical standards in the work we do</td>
<td>(No modifications suggested)</td>
</tr>
<tr>
<td>Continuous professional development of members</td>
<td>Continuous professional development of members and potential members</td>
</tr>
</tbody>
</table>
Although most of the respondents did not suggest goals, those goals that were suggested appear below.

<table>
<thead>
<tr>
<th>Proposed NSPI Awards System Core Values</th>
<th>Suggested Goals for the Awards System's Proposed Core Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective application of Human Performance Technologies in the workplace that will enhance productivity and benefit society</td>
<td>• Give award for social sacrifice... helping an unpopular cause</td>
</tr>
<tr>
<td></td>
<td>• That HPT would be recognized</td>
</tr>
<tr>
<td></td>
<td>• That productivity would be increased</td>
</tr>
<tr>
<td></td>
<td>• That HPT would be recognized as an asset to society</td>
</tr>
<tr>
<td></td>
<td>• Show impact of performance improvements on bottom line</td>
</tr>
<tr>
<td></td>
<td>• Identify and celebrate effective HPT</td>
</tr>
<tr>
<td></td>
<td>• Communicate and publicize results</td>
</tr>
<tr>
<td></td>
<td>• Find a way to get documentation on nontraining interventions that are not nicely packaged in a manual</td>
</tr>
<tr>
<td></td>
<td>• Recognize and award organizations and individuals who have applied HPT to solve significant problems, in improving productivity, and in measured benefit to Society</td>
</tr>
<tr>
<td></td>
<td>• To recognize accomplishment in the effective application of HPT toward increase in productivity</td>
</tr>
<tr>
<td></td>
<td>• To recognize accomplishment in the effective application of HPT to the betterment of society</td>
</tr>
</tbody>
</table>
### Proposed NSPI Awards System Core Values

<table>
<thead>
<tr>
<th>Proposed NSPI Awards System Core Values</th>
<th>Suggested Goals for the Awards System’s Proposed Core Values</th>
</tr>
</thead>
</table>
| Advancement of Human Performance Technologies through scholarship, innovation, and practices | - Give a paper competition ⇒ new topics ⇒ give award; keep changing  
- That HPT would get more sophisticated (i.e., see impact of Learning Org.)  
- That HPT would become better recognized  
- Identify and celebrate examples  
- Recognize with appropriate rewards those whose research, innovations, and practices have produced replicable models.  
- To recognize scholarly accomplishments in research and development  
- To recognize data-based innovations and practices in HPT |
| Consistent application of professional and ethical standards in the work we do | - Give someone an “integrity” goal  
- Raise the standard of our (NSPI) members’ ethical performance  
- To recognize consistent over-time application of HPT that meets high professional and ethical standards |
| Continuous professional development of members | - Provide programs that consistently serve to develop members  
- CERTIFICATION standards for HPT, and opportunities to “graduate” through levels of development  
- To recognize programs and activities that increase the professional development of NSPI members |
NSPI AWARDS SYSTEM REDESIGN PROJECT

Round 2 Analysis of NSPI Core Values

Analysis Results, Continued

Some of the respondents included comments they feel are relevant. They follow.

<table>
<thead>
<tr>
<th>Proposed NSPI Awards System Core Values</th>
<th>Comments</th>
</tr>
</thead>
</table>
| Effective application of Human Performance Technologies in the workplace that will enhance productivity and benefit society | • Basically agree, but we ought to include the importance of research in our technologies.  
• How will the terms “effective” and “to benefit society” be evaluated? Too general and lofty – need more focused values.  
• If NSPI embraces a social welfare goal, the organization will quickly become a platform for all who are pushing causes; NSPI would quickly lose its credibility as a professional organization (just like the American Psychological Ass’n., etc.); stay with the professional target  
• Why technologies plural? Many of us are striving to weld aspects of other technologies and systems to a technology of Human Performance; the plural waters down the impact, and open the door to rampant eclecticism; we need to close that door, not open it |
| Advancement of Human Performance Technologies through scholarship, innovation, and practices | • Make the word “practices” singular (i.e., “practice”) to be consistent with “scholarship” and “innovation”  
• NSPI Awards should be evaluated on the same criteria that companies use: Cost reduction, improved revenues, and margins; this would encourage HPT professionals to quantify impact of interventions to companies they serve! |
| Consistent application of professional and ethical standards in the work we do | • Must be a standard, and expected – I’m not sure an award for professional/ethical behavior is appropriate. (Should we) expel from the Society those who don’t?  
• I agree with the concept, but NSPI must do a better job of creating standards before they can expect members to consistently apply them. |
<table>
<thead>
<tr>
<th>Proposed NSPI Awards System Core Values</th>
<th>Comments</th>
</tr>
</thead>
</table>
| Continuous professional development of members | • So long as “rn” (*The preprofessional development of students*) is considered an aspect of this value  
• Criteria for professional competence and certification of those who gain/maintain it? Again, award seems inappropriate, yet recognition of the competency seems right.  
• Certification standards for HPT, and opportunities to “graduate” through levels of development  
• This could be part of an effective outreach to new members, as well as an enhancement of the skill of current members. |
| General Comments | • Are these the core values of the NSPI or of the Award System? They also sound like mission elements.  
• Excellent job—Congratulations  
• Restricting our focus to workplace is counter to efforts to apply Human Performance Technology in the community and to other areas of human endeavors (c.f., P&I article on applying PT to Christmas shopping...)  
• Other suggestions are grammatical, stylistic—Why capitalize Human Performance Technologies? and consistency in choice of number (innovation = practice). Otherwise, these seem good and useful. Congratulations!  
• I also have a problem with deleting (item) P (*The safety of our Society through appropriate use of fiscal resources*); if we don’t value the appropriate use of fiscal resources, we might not have a Society at all!  
• Hard to fault motherhood and apple pie! I hope “scholarship” will prevent us getting trapped by the latest fad and that pursuit of “innovation” will be more than relabeling that which was well done under previous vocabularies. |
## NSPI AWARDS SYSTEM REDESIGN PROJECT

### Round 2 Analysis of NSPI Core Values

**Analysis Results, Continued**

<table>
<thead>
<tr>
<th>Proposed NSPI Awards System Core Values</th>
<th>Comments</th>
</tr>
</thead>
</table>
| General Comments *(continued)*         | - I agree that these are appropriate core values for the Society in general, but it seems to me that only the first two relate to the Award System. (Perhaps the 4th value relates to the chapter awards program.)  
- Good summary!  
- (in reference to the “Suggested Goals” column) Does this mean what should be the goals of an Award System that carry out the intent of each “core value?” I assumed so.  
- Overall this effort to pare down and focus the core values to these four is evidence of a fine job, well done.  
- I don’t think I am being much help at this point in the process. I guess you’re trying to build an award system that is consistent with the core values of the NSPI. If so, then the goals of the award system should be the encouragement of the core values (“further the effective application of…”). Aren’t our current awards pretty well consistent with these values (except, possibly, the ones for chapters and service to the society)? I’m unsure of how these broad statements will lead to a straw model for the awards. I’m sorry I couldn’t be more help. |
NSPI AWARDS PROCESS REVIEW and RECOMMENDATIONS

Objective #3.

To describe the procedures by which the Awards Committee will be formed

- Committee formation and membership
- Committee chair requirements
- Reporting structure
- Ethics guidelines
- Conflict resolution process

DRAFT RECOMMENDATIONS

- Developed through collaboration of Carol Valen and Lynn Richards
- March 1990

Awards Committee Formation Process

1. Newly installed President selects Awards Chair for upcoming year prior to Conference so that orientation may take place during Conference.

2. Awards Chair decides, in collaboration with the President whether or not to have Co-Chair.

3. Chair determines number and categories of Awards for upcoming year using established processes and in collaboration with the President.

4. Chair determines proposed committee (with possible alternates or back-ups) using the accepted global and category specific criteria (from this taskforce).

5. President reviews and approves.

6. Chair contacts proposed Committee members and invites them to accept or contacts alternates. Complete by 1 May.

7. Chair communicates standards and criteria to Committee members at time of acceptance.
DRAFT RECOMMENDATIONS (continued)

Awards Committee Member Selection Criteria (continued)

Specific

Outstanding Member
Chair
- Former Award recipient, this category, preferably the previous year
- NSPI leadership experience at the national level, preferably former Board member
Committee
- 2-3

Outstanding Organization
Chair
- Former Board member or well known, senior NSPI member
Committee
- 4-5

Outstanding NSPI Chapter
Chair
- Chapter leader (preferably President) during year that Chapter received Award (or was at least a Finalist), this category
- Preferably the previous year
Committee
- 3-5
- Former Regional Consultants, former Chapter Presidents and Chapter Officers or leaders

Outstanding NSPI Chapter Publication
Chair
- Chapter leader (preferably Editor, Vice President or Chair responsible for Chapter Publication during year that Chapter received Award (or was at least a Finalist), this category
Committee
- 3-4
- Former publication editors, staff or officers

Outstanding Instructional Communication
Chair
- Previous Award winner or finalist
Committee
- 3-5

Outstanding New Systematic Application
Chair
Committee
- 3-4
DRAFT RECOMMENDATIONS (continued)

Awards Committee Member Selection Criteria (continued)

Specific (continued)

Outstanding Human Performance System
Chair
  o High level of expertise and experience with Performance Analysis
  o
Committee
  o 2-3
  o

Outstanding Instructional Product or Intervention
Chair
  o High level of expertise and experience with ISD
  o
Committee
  o 5+
  o

Outstanding Performance Aid
Chair
  o
Committee
  o 2-3
  o

Outstanding Article in Performance & Instruction
Chair
  o Previous Award winner or finalist
  o Not an author during the current year
  o Not the editor or staff member
Committee
  o 3-5
  o

Outstanding Article in Performance Improvement Quarterly
Chair
  o Professor or other recognized expert in research, evaluation or scholarly publications
  o Not the editor or staff member
Committee
  o 2-4
  o

Outstanding Student Research
Chair
  o Coordinated with and may report to NSPI Vice President - Research & Development
  o Meets global criteria but may only have dotted line to Awards Chair
Committee
  o 2-3
  o
DRAFT RECOMMENDATIONS (continued)

Awards Committee Ethical Consideration & Guidelines

1. Absolute secrecy regarding winners
2. Absolute confidentiality regarding submittals
   (e.g., no discussion of submittals outside committee regarding contents,
   quality, ranking, etc.)
3. Immunity to political pressure regarding, among other things, submittals
   from well-known members or recognized figures in the field
4. Absence of or ability to overcome personal biases (pro or con)
5. Integrity to follow through on commitment

Awards Committee Conflict Resolution Process

1. Potential Conflict of Interest perception regarding committee members at
   any level (e.g., submittal to committee that member is serving on)
   o Member steps down voluntarily or is removed by Awards Chair
2. Interpersonal conflicts with non-finalists, finalists, winners or others
   o Referred to Awards Chair if unable to resolve at lower levels