

# Performance Improvement

*International Society for Performance Improvement*

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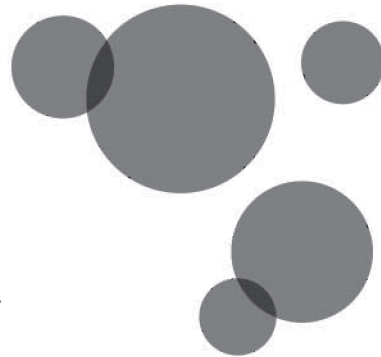
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# I SPY WITH MY LITTLE EYE ... A VISION

Peter C. Honebein, PhD

A recent project has caused me think a lot deeper about Mega (Kaufman, 2000), which is an aspect of needs analysis that considers societal-level outcomes primarily associated with well being. My interest has been in terms of better understanding the vision that Mega represents and how such visions drive innovations that reflect outcomes associated with quality of life.

The project I am involved with is related to a recent *Economist* article about a technology called a solar home system (SHS) (*Economist*, 2016). A SHS includes a solar panel, a battery, LED lights, USB ports, and 12V receptacles that allow for lighting, charging of cell phones and radio, and running appliances such as televisions and refrigerators. The primary audience for an SHS consists of rural families in the developing world who live in an off-grid region of a country. *Off-grid* means that there is no electrical service. The primary markets for this technology are Africa, India, and the Middle East.

In one country, Kenya, the vision that is a driving force for SHS is the national goal to make Kenya kerosene free by 2022 (Kenya Ministry for Energy and Petroleum, 2016). In addition to a cooking fuel, kerosene is used for lighting. It provides a poor-quality light, and given the proximity of the light to tasks people perform, its emissions increase a variety of health risks.

So far, so good, right? There is a clear Mega-level need, a vision that represents that need, and a technology (tool, in our HPT parlance) that shifts people away not only from kerosene, but from dry-cell batteries and the high cost of mobile phone charging services (more than 80% of the population in Kenya has a mobile phone (World Bank, 2016)).

So far so good, right? Well, not so fast. The price for a SHS ranges from about \$200 to \$600, depending on its size (in terms of power generation and storage). People in that part of the world don't have that much cash sitting around. But what organizations have figured out is that household expenditures for kerosene lighting, batteries, and mobile phone charging is about \$0.70 per day. If the price of an SHS was set to \$0.50 a day, then households saw value and were more willing to adopt. And thus credit (a resource) through a mobile phone payment system has enabled households to acquire an SHS and own it outright in 12 to 36 months. M-Kopa, an organization that sells, installs, and finances SHS, reports having connected 400,000 households during the past three years and is currently adding 500 a day (M-Kopa, 2016).

The point of my story is that even with a clear vision such as *kerosene free in 2022*, Mega-level needs reflect complex systems that test the boundaries of our HPT model. For example, with SHS, the enabler is not the SHS itself but the credit infrastructure that makes the SHS affordable. Other SHS organizations that have experimented with cash sales, rentals, and other business models are all moving to credit. I spy with my little eye something ... innovative!

To help us better understand the intricacies of vision statements as drivers of performance at all levels of worker, work, workplace, and world, this issue of *Performance Improvement (PI)* starts with Shelley Kirkpatrick's views not



only about the role of vision, but about mission and values as they relate to our HPT model. Her research suggests that clear, well-formed vision statements have a positive impact on organizational performance, if that vision statement is well-formed. Kirkpatrick suggests a set of clear characteristics that drive performance-enhancing vision statements and offers a five-stage model for managing vision-statement evolution.

If all this talk of Mega-level visions and innovations for saving the world is causing you anxiety and stress, then our next article comes just in time. Jonathan Andersen tackles the problem of pressure in organizations. He introduces us to the three balancing forces of pressure, tension, and compression and connects those concepts to how they impact individual-, group-, and organizational-level outcomes. He also provides some practical ideas for how human performance technologists can devise solutions that help manage pressure in organizations.

When I first read the next article, I immediately fell in love with it. The reason is that it comes to us all the way from Pakistan. Who knew that the tentacles of HPT reached that far! In the article, Dawood Shah describes for us a training-needs analysis he completed for leaders in Islamabad Model Schools. What I like most about the article is how it focuses on overcoming the *go get them, tiger* method of management, where one has enough seniority to be thrown into a leadership situation, but lacks the skills to truly prosper and lead change. Through the training-needs analysis, Shah is aiming to break this vicious circle. While you might just look at this article through a narrow lens of a simple analysis, I suggest you think about it from the broader perspective of change management.

Dr. Shah may want to take note of the next article, especially in terms of the high-priority leadership style and skills topic identified in the analysis. In this article, Eileen Maseo explores ideas for creating a culture of respect in organizations, tying it to practices of exemplary leadership. One of my favorite ideas in this article was the usage of yellow and red cards (from soccer) to signal unacceptable or inappropriate behavior in the workplace.

In fairness to the other academic profiles that have and will appear in *PI*, I will try as hard as I can to curb my enthusiasm for this month's profile of Indiana University's

Instructional Systems Technology (IST) program. Essentially, this means I am only wearing one piece of red clothing while writing these Editor's Notes (for those who don't know, your humble editor is an alumnus of the program and has taught as an adjunct professor for the past 13 years). Sung Pil Kang and Yeol Huh (also IST alumni) limited the amount of red clothing they wore during their editing of the profile, which I feel contributed to their careful editing that ensured that the IST profile did not take up all 48 pages of *PI*.

Finally, for our back-page article, Ria Roy takes us to Disneyland and explores the human performance attributes of Disney's new MagicBand. And no, MagicBand is not the new Main Street marching band. 🌟

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# UNDERSTANDING THE ROLE OF VISION, MISSION, AND VALUES IN THE HPT MODEL

Shelley A. Kirkpatrick, PhD

Performance Improvement (PI) practitioners rely on the Human Performance Technology (HPT) model when diagnosing organizations and recommending interventions. However, the vision, mission, and values aspect of the HPT model is often overlooked or misunderstood. Research is summarized on the positive, significant impact of the vision statement on organizational performance, and characteristics of effective vision statements are reviewed. Results are also presented from a descriptive study of vision statement development, communication, and implementation. Implications for PI practitioners are provided for conducting organizational analyses as well as recommending effective vision statements and supporting vision statement development.

Performance improvement (PI) practitioners apply the Human Performance Technology (HPT) model (see Figure 1) when analyzing an organization, identifying performance gaps, and recommending interventions to address the gap (Van Tiem, Moseley, & Dessinger, 2012). However, the vision, mission, and values of the organization in relation to the HPT model are often overlooked or misunderstood.

A better understanding of the organization's vision is needed to conduct an accurate performance analysis as well as to identify solutions that will address the gap and will align with the organization's desired future. This article defines the concepts of vision, mission, and values, discusses the impact a vision statement can have when it reflects certain characteristics, and addresses the research on vision statement development and implementing the process. In addition, the article addresses implications for PI practitioners by providing specific actions they can take when working with organizations to diagnose and improve their performance.

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## UNDERSTANDING THE ORGANIZATION'S VISION STATEMENT

Although considerable research demonstrates a vision statement's positive impact, little research has addressed how to develop an effective vision statement. As part of the process to help clients formulate a vision statement, I reviewed academic and practitioner literatures and found little empirical research to guide the development of an effective vision statement.

To address this research need, I conducted a descriptive study of 30 leaders in successful companies and interviewed CEOs, presidents, and founders (see Kirkpatrick, 2016, for complete details and results). Of the 30 leader interviews, 14 of the companies they led had been recognized on at least one best-places-to-work list (Best Small Places to Work 2014, Best Medium Places to Work 2014, Fortune 100 Best Companies to Work For® 2015). Other companies were identified through networking, and they served as a convenience sample of companies that were regarded by the referring individual as highly successful.

The sample of companies included large companies (e.g., Allen Edmonds, Sun Microsystems), medium-sized companies (e.g., Hagerty Insurance, Plante Moran), and small companies (e.g., ACF Solutions, Dahl Morrow

## Performance Improvement/HPT Model

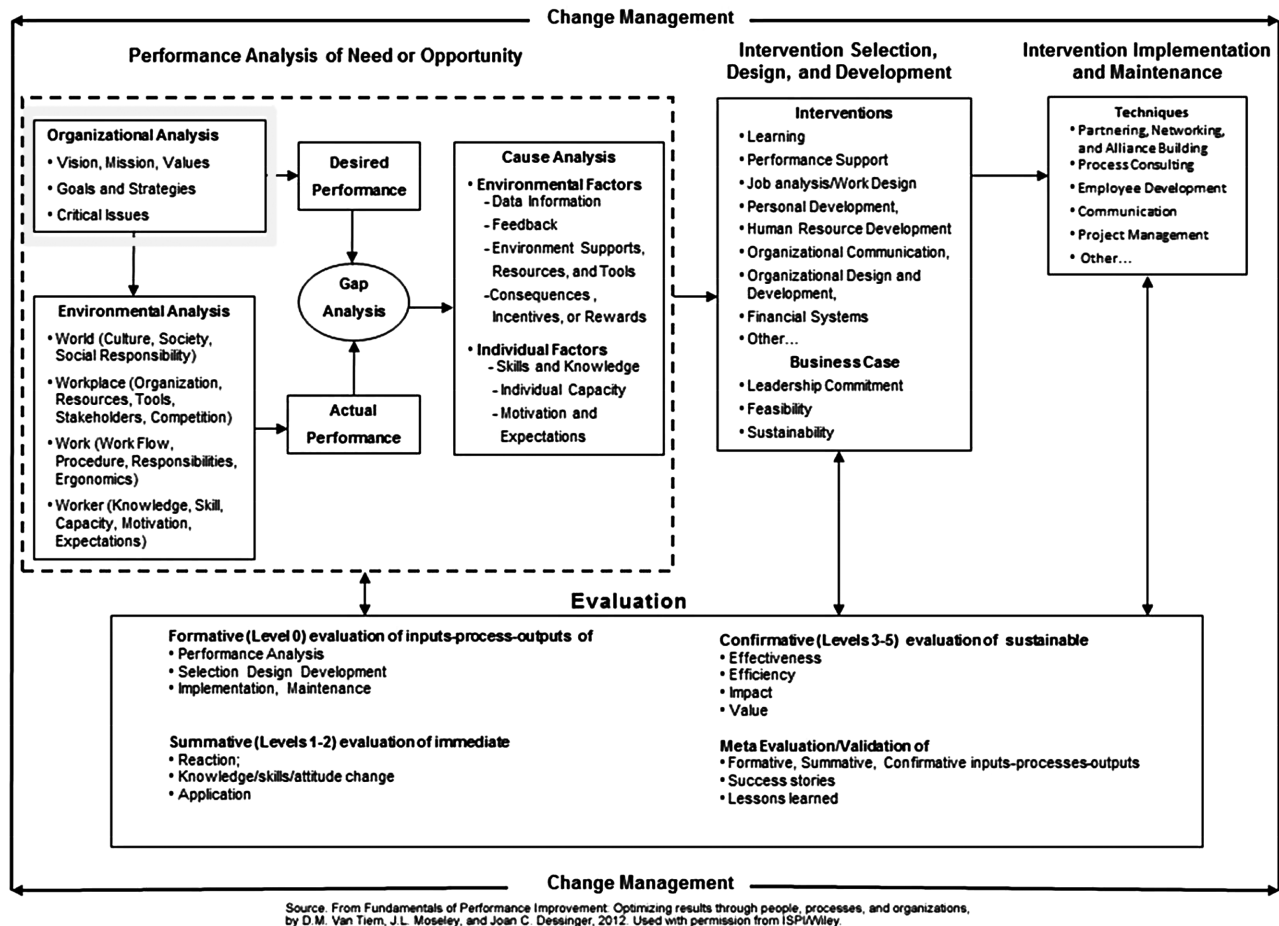


FIGURE 1. The Human Performance Technology Model (Van Tiem, Moseley, & Dessinger, 2012). Used with permission from ISPI Wiley.

International, ICATT Consulting, Ruby Receptionists, South Mountain Company, Talent Plus, Xactly). The sample also represented product companies (e.g., Allen Edmonds, Bubble Shack Hawaii, ThinkGeek) and services companies (e.g., Advantage Answering Plus, Contraqer, ICATT Consulting, Infusionsoft, Introhive, Resonate Insights, Stellar Solutions, Zenoss) as well as nonprofit organizations (e.g., Chesapeake Bay Organizational Development Network, City of Rancho Cordova, Community Memorial Hospital).

### VISION AND RELATED CONCEPTS:

#### Definition and Impact

The vision statement and the mission and values statements are often confused with each other, partly due to a lack of standard, accepted definitions and partly due to the concepts being combined in different ways in practice. Some organizations combine the concepts of vision

and mission into a single statement, others combine vision and values, and still others combine all three into a single statement. For clarity, I define these concepts as follows:

- **Vision** is the positive impact that the organization wants to have; a vision statement is a formal description of the organization's desired, long-term future state.
- **Mission** is the organization's purpose; a mission statement defines the products or services provided to customers or constituents.
- **Values** are ideas that are important and that the organization seeks to retain; they define the means or behaviors by which the organization will go about attaining its vision.
- **Strategy** is how the organization will carry out the vision and mission.

## *Vision statements play a key role in driving change and performance in organizations.*

The leaders I interviewed also expressed confusion over these concepts. Although I have defined them for clarity purposes, the leaders' advice was to not become concerned about the definitions. Larry Sternberg, president of Lincoln, Nebraska's TalentPlus, stated, "I choose not to get into semantic discussions about how they are defined." Similarly, Christopher Cabrera, founder and CEO of San Jose-based Xactly, advised,

Don't get caught up in other people's definitions of vision and mission statements. All that matters is what your employees think it is. If you and your employees can agree on what you think it is, you can work together toward the vision.

Although the leaders I interviewed used various terms to reflect their vision, mission, and values statements, for ease of communication in this article, I use the term *vision statement* to mean any statement that describes the long-term, ideal future as well as related elements such as mission or values.

Vision statements play a key role in driving change and performance in organizations (Kirkpatrick, 2004, 2009). A vision statement's impact on team, group, or unit performance has also been documented. Studies have identified a positive impact of vision statements on division and manager effectiveness (Barling, Weber, & Kelloway, 1996; Bass, Avolio, Jung, & Berson, 2003; Howell & Avolio, 1993; Howell & Higgins, 1990; Schaubroeck, Lam, & Cha, 2007). The role of the vision statement in facilitating organizational change has also been examined, with studies finding that companies whose vision statement focused on a desired future state were better prepared for change than those with a vision statement that did not focus on change (Coulson-Thomas, 1992; Larwood, Falbe, Kriger, & Meising, 1995; Roberts, 1985).

The impact of vision statements on individual outcomes has also been examined. Controlled laboratory simulations document the significant, positive effect of a leader who communicates a vision statement on individual performance (Howell & Frost, 1989; Kirkpatrick & Locke, 1996). Further, the vision statement has a positive impact on a range of employee attitudes, such as organizational commitment, job satisfaction, and task clarity (Griffin, Parker, & Mason, 2010; Kirkpatrick & Locke, 1996; Niehoff, Enz, & Grover, 1990).

Despite the evidence regarding the vision statement's impact, not every vision statement is equally effective. Several studies (Baum & Locke, 2004; Baum, Locke, & Kirkpatrick, 1998; Kirkpatrick, Wofford, & Baum, 2002) have found that vision statements that contained certain characteristics were linked to organizational performance. These characteristics are as follows:

- **Clarity:** the extent to which the vision statement is understood by employees
- **Future focus:** describing the desired future (not current) state
- **Abstractness and challenge:** providing a non-concrete, difficult yet achievable future
- **Idealism:** portraying a highly desirable future
- **Brevity:** providing a succinct, easy-to-remember statement
- **Uniqueness:** describing how the organization differentiates itself from other organizations, including its products and services, markets, strategy, or company history
- **Success definition:** stating how the company measures its progress in achieving the desirable future

Although research has not yet been able to specify the exact combination of characteristics needed for effectiveness, it suggests that clarity, future focus, abstractness and challenge, and idealism are more essential than the other characteristics. Clarity is essential because employees must be able to understand the vision statement in order to align their actions with it. Future focus, abstractness/challenge, and idealism are all elements of the definition of a vision statement and therefore are necessary characteristics.

### Implications for PI Practitioners: Begin with Organizational Analysis

Given the research support for a vision statement's impact, when conducting an organizational analysis, PI practitioners should first determine whether the organization has a formally stated vision.

Next, PI practitioners should review the vision statement to determine which characteristics are reflected in the vision statement. PI practitioners should focus on the extent to which the statement is clear, focused on the future, abstract and challenging, and idealistic. Because the vision statement must be clear and inspirational to employees but not necessarily to practitioners, PI practitioners should obtain input from employees about their perceptions of the vision statement. Employee feedback could be collected through a formal survey, focus groups,



*From the interviews of 30 leaders, I identified five stages that comprise a vision statement development cycle.*

or individual interviews to confirm employees' awareness and understanding of the vision statement as well as the degree to which they find it relevant and motivational.

## VISION STATEMENT DEVELOPMENT

Despite considerable research on a vision statement's impact, we know less about how and when to create one, which was my reason for conducting a descriptive study of vision statement development. From the interviews of 30 leaders, I identified five stages that comprise a vision statement development cycle (see Figure 2).

### Stage 1: The Uncommunicated Vision

At Stage 1, the leader found inspiration for forming a company and had an ideal future in mind without formally stating that future. Without an initial inspiration for forming a company, the leader would not have been able to formulate and communicate a formal vision statement.

One source of inspiration is problems experienced in daily life. Dwight Gibbs was a drummer in a rock band who was in charge of ordering all equipment and supplies, such as speaker cables, drumsticks, and tee shirts. Requesting and organizing quotes in spreadsheets was unnecessarily time consuming. Later in his career, he served as CTO for several companies, including co-founding The Motley Fool, and experienced the same frustrations. Gibbs states,

In my role as CTO, I would get requests for laptops, servers, storage, software, and other equipment we needed to buy. The requests for the stuff people needed were constantly coming across my desk. I was dealing with RFQs [requests for quote] again! This time, when quotes came back, they could be 500 lines long or more. I had to put all this information into Excel to compare the quotes. All I could think was—it should not be this hard!

Gibbs founded Contraqer, a procurement software firm, for which he later (at stage 3) created a brief, memorable formal vision statement titled *Friction Free Procurement*.

Another common source of inspiration was finding unexpected initial success in business. Some leaders pursued their passion without initially giving much thought to turning it into a business. However, their friends and colleagues observed their success as well as their passion and prompted the leaders to reassess their aspirations and see potential in their businesses. Clate Mask, co-founder and CEO of the software firm Infusionsoft, didn't initially realize his company's full potential. He stated,

When we started, we had no intention of building a big business that would need a vision statement. We thought it would be a small company that we would sell after a few years. We went through three years of brutal survival, and then some modest success for a few years. At that point, we started to see that we were onto something really big.

A practitioner prompted Mask and his co-founders to change their thinking when the practitioner asked why they weren't "going for it" to grow the company. That challenge helped them decide that they wanted to build a company that was "big and impactful."

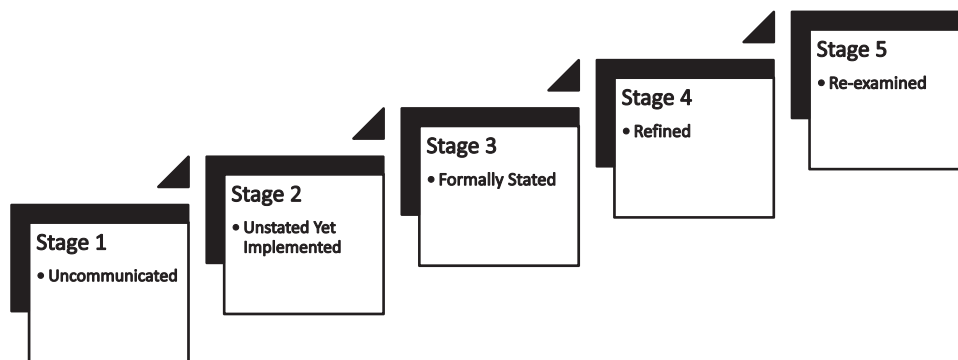


FIGURE 2. Five Stages of Vision Statement Development

Some leaders drew on their early career experiences and used their company to find better ways to do things. Celeste Ford worked in engineering firms before striking out on her own to found Stellar Solutions. For Ford,

The vision statement was a natural evolution of being in the industry for many years and seeing what worked and didn't work. Ford's vision remains untouched 20 years later—"To satisfy our customers' critical needs while realizing our dream jobs."

Clearly, one lesson that Ford applied to Stellar Solutions was a dual focus on both customers and employees. Ford "wanted to build a built-to-last, not a built-to-flip or sell, company."

## Stage 2: Unstated yet Implemented

At stage 2, the leader had implemented an unstated vision. The leaders I interviewed who experienced this stage did not formally state their vision for several reasons: they had not found the right words, were too busy running the company, or did not initially see the importance of stating a formal vision.

Andy Hunn, CEO and founder of Resonate Insights, held several positions at fast-growing start-up companies throughout his career. Those companies grew so fast that, according to Hunn, they didn't have time to create a formal vision statement. At Resonate Insights, he said, "We've never really been smart enough to come up with one. The best thing we can do is to make the vision a living thing with the company by continually reinforcing it verbally and through behavior."

Other leaders indicated that they felt they couldn't initially live up to the idealism that would have been reflected in a vision statement. Scott McNealy, former Chairman, CEO, and founder of Sun Microsystems, explained why he felt that stating a vision during the company's early days would have been hypocritical: "Most leaders use the vision statement to sound and look good, but if it doesn't reflect what's going on in the company, then it's worthless."

McNealy wanted to evolve the culture to the point that it reflected his vision; only then did he think there was enough alignment for him to communicate a formal vision statement. He developed a formal vision statement many years after founding the company, which was "to eliminate the digital divide while doing no harm to the planet."

Despite the lack of a formally stated vision, these leaders found ways to implement their vision in a variety of ways. They set goals aligned with the unstated vision and reinforced those goals through slogans, mantras, and symbols. The leaders felt their energy and focus were contagious and helped motivate their employees. They obtained

a shared sense of clarity with them through continual discussion focused on the desired future. Andy Hunn explained how he ensured that employees were clear on his informal vision when he was at internet company Digex:

It worked because we spend a tremendous amount of time playing the role of connector. The role had nothing to do with our formal responsibilities in the company, but we spent time with employees who were executing on day-to-day work and were talking to them about strategic opportunities in the market. This kept everyone going in the same direction.

Another key to success at this stage was that the leader and co-founders shared and agreed on the vision. One way they were able to do this was through constant communication. Jody Glidden, founder and CEO of Introhive, stated that he and his co-founder had "pretty passionate discussions" about what the company should be. They had founded a previous company together and therefore felt that they were on the same page without having to formalize their vision.

Leaders with fewer than 30 employees indicated that it was possible to have frequent, one-on-one conversations with co-founders and employees to ensure common understanding and implementation of the vision. Leaders of companies that grew beyond the size of 30 employees and who waited to write a vision statement reported that they wished they had written a vision statement sooner. For example, Kristin Sharpe of ACF Solutions stated,

We didn't have it formally written down until a couple of years ago. That's unfortunate, but that's the truth. When we did the mission, vision, and core values, we were at a time of growth and change, which is not easy.

It is painful and hard at times to bring about change. It's very personal. I wish that we had more formally written down the vision statement early on. We said that because we're small, we don't need to write it down. I didn't realize how important it was until I sat down to do it. It was good that we did it then. It was good to get it down and was more challenging than I expected.

So, although it was possible to experience considerable success, imparting the vision using a one-on-one approach was a time-consuming, labor-intensive process for the leader. That process became nearly impossible as the company grew beyond 30 employees; leaders in this situation went on to stage 3.

### Stage 3: Formally Stated

Almost all of the leaders progressed to stage 3 by developing a formal vision statement. Some leaders developed the vision statement alone, while others involved a combination of co-founders, top management team, employees, customers, and other stakeholders.

How the leader went about writing the statement depended on the size of the company. In small companies that typically had 30 employees or fewer, some leaders felt that they bore sole responsibility for writing the statement. Ashley Harding, founder of Bubble Shack Hawaii, a manufacturer and wholesaler of natural bath and body products, stated: “The responsibility for writing the statement falls squarely on the entrepreneur’s shoulders.”

Other leaders involved all employees in reviewing the vision statement. John Abrams of South Mountain Company indicated: “We had a draft statement that we reviewed in a series of open meetings” with employees.

In contrast, larger companies that typically had more than 30 employees included both executives and employees representing specific groups and units. Larry Sternberg of Talent Plus described a facilitation process for a vision statement development workshop that he had used with several organizations. The process consisted of forming a planning group that represented executive and lower levels in a company, asking thought provoking questions to generate debate about the vision and articulating draft vision statements that were then shared with others to obtain feedback before the statement was finalized.

Kathryn McCarthy of ThinkGeek recommended using an outside facilitator to guide a larger team through the vision statement development process. McCarthy explained, “Everyone in a company has their own strong, passionate views. Having some help to pull all those views together is helpful.”

### Stage 4: Refined

At stage 4, leaders sought feedback on the draft vision statement in an attempt to find the right words to express their vision. They used the feedback to create the final version of the vision statement.

Gabe Hamda, founder and president of ICATT Consulting, a small human performance consulting company in Jacksonville, Florida, had been trying to find the right way to express his vision for his company. He was meeting with a client when he said, “We improve your people.”

Hamda suddenly realized he might be insulting the client by implying that her employees were not up to par, so he asked her if that was the case. Before the client could answer, one of ICATT’s interns whom Hamda had brought to the meeting responded, “Let’s say that ‘your people are

great and we make them better.” That statement became ICATT Consulting’s formal vision statement.

Similarly, Bill Karpovich, co-founder and former CEO of IT consulting firm Zenoss, described how the company’s original vision statement, *Changing the game in systems management* was refined to reflect terminology that more clearly conveyed his intent as well as wording that was commonly used in the technology industry. The final statement became *transforming IT operations*.

### Stage 5: Re-Examined

At Stage 5, leaders periodically re-examined and, if necessary, revised the formal vision statement. Leaders intentionally reviewed the vision statement from time to time, such as quarterly or annually, to ensure that it continued to reflect the current state and was clear to employees. The vision statement was revised only if the company had evolved, employees were unclear what the original statement meant, or the market had changed.

Jill Nelson, founder and CEO of Portland, Oregon’s Ruby Receptionists, explains: “The essence of our statements has never changed, but the wording has changed a few times.” To Nelson, perfecting the wording is a never-ending process. She revisits the company vision statement at an annual leadership retreat. Ruby Receptionists’ vision statement is *We want to be the business-hold name [similar to being a house-hold name] known for exceptional customer service and making personal connections*.

Leadership and employees at Allen Edmonds, founded in 1922, had seen the market change many times. CEO Paul Grangaard took over in 2008 when the company’s market share was declining and debt was increasing. Grangaard updated the company’s vision to clarify its new direction of expanding beyond men’s shoes to men’s apparel. He explained, “Our vision was to regain our position as a great American shoe company, and now it is to become an American lifestyle brand from head to toe.”

Kathryn McCarthy, now former Chairman and CEO of Geek.net and ThinkGeek, also evolved the vision statement as the company’s offerings changed. Founded in 1999, ThinkGeek’s original business consisted of several websites as well as the ThinkGeek e-commerce site. The two lines of business had similar customers but were different enough that the decision was made to focus on the e-commerce side. The tag line *Stuff for Smart Masses* doubled as the initial vision statement in the early days. Once the decision was made to focus on the ThinkGeek site, a more formal vision was created, which was, *To create a world where everyone can embrace their inner geek, express their passions and connect with one another*.

The vision statement helped the company focus on a broader definition of what a *geek* is, according to McCarthy. It reinforced the idea that the client base included *uber geeks* that made up the original client base as well as “moms who want to buy gifts for people in their lives,” she stated. This led to adding more products geared toward women and other demographic groups that were different from the company’s original focus.

## Implications for PI Practitioners: Tailor Vision Statement Development to the Client

PI practitioners should tailor their recommendations to the client’s vision statement development stage. Clients at stages 1 or 2, who have an unstated vision, should be advised to formalize their vision as soon as possible and to implement (or continue to implement) the vision.

To write the vision statement (stage 3), leaders of small companies should consider writing the initial statement themselves or with other leaders (such as co-founders or other top executives). Leaders of larger companies should involve as many employees as possible, including the top management team, along with employees who represent groups and levels across the organization. By seeking input on the draft statement as well as feedback and input on additional concepts or wording that could be included, a final vision statement can be developed (stage 4).

Clients with a formal vision statement that is understood and that employees find motivational should be encouraged to revisit their vision statement at least annually (stage 5), revising it if needed.

## COMMUNICATE THE VISION STATEMENT

All of the leaders I interviewed agreed on the importance of communicating the vision statement repeatedly to employees so that all elements of the company were aligned with the vision. Communicating the vision statement entailed much more than sending a single email or printing posters with the statement. The leaders communicated their vision in many different ways and integrated its communication into their daily conversations.

Founder and CEO of recruiting firm Dahl-Morrow International, Andy Steinem, emphasized: “We have a lot of communication; we have weekly meetings where we talk about our goals for the week as well as our challenges and what we are doing in a changing market or landscape.” Another leader, Larry Sternberg, president of Talent Plus, suggests keeping the vision, along with mission and values, alive with a 10-minute daily stand-up meeting with employees, where each element of these statements is reviewed each day.

Communicating the vision went beyond simply repeating the statement word for word. Leaders tailored their explanations of the vision statement to get the message across. Ashley Harding, founder of Bubble Shack Hawaii stated, “We have to deliver the same message in a different way to different employees, whether they are putting labels on bottles or are sales executives.”

## Implications for PI Practitioners: Coach Leaders to Integrate Communication into Daily Behaviors

Obvious communication methods, such as posters, email messages, or internal websites can be used to reinforce the vision statement, but they should not be the sole means for communicating it. The communication of organizational outcomes, such as quarterly financial performance or winning a new contract, should reference the vision statement and explain how the outcome aligns with and represents the intended vision.

PI practitioners should coach leaders, including senior management as well as managers and influential employees throughout the organization, to communicate daily actions and decisions as they related to the vision statement. PI practitioners should look beyond typical communication programs, which can easily and quickly become misaligned with the vision statement, and should attempt to reinforce the integration of the vision statement into all communications.

## IMPLEMENT THROUGH ALIGNMENT

Regardless of which vision statement development stage a company was in, the leaders emphasized the importance of putting the vision into practice by aligning the organization’s strategy and goals as well as the talent management system, culture, and structure with the vision statement.

The leaders described how their strategy, along with short-term and long-term goals, aligned with and supported the vision statement. As goals were met, leaders rewarded their accomplishment and reminded employees how their achievement furthered the vision. After their success was celebrated, new goals were set, which leaders communicated in the context of the vision statement. For example, Marty Imes, Director of Vision and Culture at Advantage Answering Plus, holds celebrations when the company meets its quarterly goals; each quarter, a different theme is set, such as “spreading goodwill.” Progress toward this theme was tracked by employees, who reported compliments from customers using an online tool. The number of compliments far exceeded expectations.



Employees started to post the compliments on the office wall, and after several weeks, the walls were filled with compliments, providing a great visual representation of goal realization.

Leaders also aligned the talent management system, hiring, onboarding, selection, performance management, and separation with the vision statement. For example, Jill Nelson, CEO and founder of Ruby Receptionists, changed how her company advertised when recruiting new employees. Originally, job announcements focused on an applicant's years of experience, which did not yield the types of applicants Nelson wanted. In line with Ruby Receptionists' vision of *preserving and perpetuating real, meaningful relationships*, the new announcement read, "if you delight in helping others, we want to hear from you!"

The vision statement, often along with values, was also emphasized when employees were onboarded into the organization as well as used to provide performance feedback. New employees were given copies of the vision statement, and leaders met with new employees to share the company's history as well as the bigger picture of where the company was headed. Leaders and others in the organization provided feedback as it related to the vision statement. Jill Nelson of Ruby Receptionists describes the importance of the company's values that complement the vision statement: "We try to use them positively and proactively; we don't use the values to tell someone they are doing something wrong."

The leaders also described how their organization's culture aligned with the vision statement. Culture, defined as expected norms and behaviors, is determined by the vision statement as well as by values statements. Incentive management company Xactly relies on its vision and values statements to define expected norms. Community Memorial Hospital in rural Hicksville, Ohio, defines its values with behavioral statements that describe specifically what employees are expected to do, such as *We will make eye contact and acknowledge each person we pass in the hall, even if it is the 10th time today.*

Finally, the organization's structure must align with its vision statement. For example, ACF Solutions, a company that provides sales-force implementations, has two product lines, each of which is reflected in its vision statement of *ACF Solutions teams with non-profit and higher education organizations to implement cloud-based, enterprise solutions to achieve their missions.* Similarly, ThinkGeek originally consisted of two distinct businesses, an e-commerce website and media properties. Today, the company focuses solely on its e-commerce website, which is reinforced in its vision statement of *creating a world where everyone can embrace their inner geek, express their inner passions, and connect with one another.*

## Implications for PI Practitioners: Recommend Interventions That Align with the Vision Statement

When conducting an organizational analysis, PI practitioners should examine the organization's internal environment to determine the extent to which it supports the vision statement. Only interventions that align with the vision statement should be recommended for implementation or continuation. This advice is counter to typical recommendations, which often focus on ensuring that organizations follow best practices. The leaders I interviewed did not always follow typical best practices; instead, they chose the interventions that aligned with their vision statement, regardless of whether their intervention was considered to be a best practice.

PI practitioners should evaluate the effectiveness of prescribed interventions, using the vision statement as a gauge or yardstick. Care should be taken to develop metrics that reflect the vision statement as opposed to metrics that are easy or convenient to measure.

## CONCLUSION

As the process of creating, communicating, and aligning a vision statement is not always easy to do, it does not require expensive investment. It does, however, require focus, effort, and energy. Leaders who are passionate about their companies should, no doubt, be able to harness their own inspiration and share it with the rest of the company.

PI practitioners have an active role in coaching leaders, including senior management, lower-level managers, and influential employees throughout the organization to communicate daily actions and decisions as they relate to the vision statement. PI practitioners should look beyond typical communication programs, which can easily and quickly become misaligned with the vision statement and should attempt to reinforce integrating the vision statement into all communications while tailoring their recommendations to the client's vision statement.

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# MANAGING PRESSURE IN ORGANIZATIONS

Jonathan R. Anderson, PhD

Humans have an innate sense for recognizing and responding to pressure. Many outcomes of pressure in organizations have been studied in the personal and organizational improvement literature, including stress, turnover, employee health, and organizational performance. Surprisingly, very little research focuses on the two alternative forces of pressure, tension and compression, and how these forces affect individual, group, and organizational-level outcomes. Nor has research studied antecedents to the rise of either type of pressure in organizational life. Notwithstanding this void, tension and compression create the social and structural order that allow pressure to have an impact on individual decisions, organizational culture, and performance. This article contributes to our understanding of performance improvement by developing a theory about and providing practical applications for managing pressure in organizations.

HOW OFTEN DO each of us feel pressure at work? Pressure comes from a variety of sources. It can be as innocuous as a line in a job description, an email from a boss or colleague, or the influence of organizational culture on personal decision making. It also can be overt such as a confrontation with a colleague, an ongoing work conflict, or losing a client. Despite the power pressure carries, organizations rarely understand how pressure can be effectively used (or misused) in influencing or improving human performance. As an organization seeks to gain and sustain competitive advantage, it is imperative for organizations, along with the people who manage them, to better understand the elements of pressure so that they can simultaneously harness its power and divert its corruptive influence.

A study of pressure can begin with describing how individuals feel the influence of pressure at work. The operational definition of pressure is rooted in the physical world and describes the weight or force produced when “something presses against something else” (Merriam Webster, 2016). This definition is closely related to how people feel pressure in organizations. Statements such as “My boss puts pressure on me to complete my work with too much perfection,” or “I feel so much pressure because I have so many tasks to complete,” are common examples of pres-

sure. Each statement represents pressure being placed on an employee. Yet, the type of pressure described by each employee has a different outcome. In the first statement the boss puts pressure on the employee to perform one task with exactness. In the second an employee is required to balance a number of different tasks at once. These statements show the complexity of pressure in organizations.

Let’s work through each statement. The first statement seems to suggest that the respondent feels the weight of completing tasks with incredible accuracy. There are many such times in organizations when people feel this type of pressure. With the advent and distribution of spreadsheets in the workplace, all data can now easily be organized, manipulated, and presented to tell a clear story of what is happening within an organization. Yet, the work of preparing such data is incredibly meticulous and time consuming and can easily be fraught with opportunities for error. Those who work in such environments feel the pressure to perform well as the influences of reputation and evaluation are weighing down on them. For the purposes of this article, we will call this element of pressure *compression*. Compression occurs when pressure forces an employee to focus on every detail of one specific assignment.

The second statement, although it also uses the term *pressure*, describes a completely different phenomenon.

In this instance the employee is pulled in many different directions and needs to be able to keep multiple projects moving forward without letting any one project demand too much time. For the purposes of this article, we will call this element of pressure *tension*. Tension is pressure that is felt when an employee is pulled in many different directions and feels stretched too thin.

Indeed, the underlying elements of pressure in the physical world are times in which two things are pushed together (compression) or pulled apart (tension). Similarly, those who feel it do not experience pressure in organizational life the same way. Some feel the pressure to focus and perform well on every detail of one or a few tasks, while others feel spread thin and feel stretched to keep everything they are asked to do progressing. Both elements of pressure, tension and compression, have their place in creating an organization's climate and are a source of power in organizational life and human performance.

In evaluating the level of pressure in any situation, we can identify the level of tension and compression. We can also identify times in which these pressures are in balance, or at a point of equilibrium, having a net force in both directions. There are also times when the net force is stronger than at other times; thus, the strength of the pressure must be addressed as well. To better understand pressure in organizations, we will place it in the context of a management-by-objective system.

## ORGANIZATIONAL PRESSURE AND MANAGEMENT BY OBJECTIVE

Since its introduction, the concept of management by objective (MBO) (Drucker, 1954) has spread throughout organizations of all scopes and types. It was an effort to add a systematic approach to managing the process of aligning individual contributions to organizational objectives. It was an attempt to help professionalize the work of management and move organizations away from drives or whims and toward a systematic approach for organizational improvement.

When Drucker (1954) introduced this practice, he merged two ideas: management by objectives and self-control. He was emphatic that management by objective should be used as a means to "direct oneself and one's work" (p. 161) and not to mean "domination of one person by another" (p. 161). In its pure and intended form, a manager would set objectives for areas of his or her responsibility and ensure they were aligned with the organization's or the division's objectives. The manager would then report back to his or her superiors the extent to which the objectives were accomplished and identify plans to improve performance in areas that were deficient. The con-

*Pressure can be a deceptive part of any work relationship, and without taking its effects into consideration, a manager can unwittingly place undue and unintended pressure on employees.*

cept is simple: set clear objectives that are aligned with higher-level objectives, perform the work that is needed to accomplish the objectives, report on the results, and begin the process over again.

Many organizations implement MBO systems through their performance-appraisal systems. Ideally, these systems would identify what a worker should accomplish during a set time period and which metrics will measure performance at the end (Orpen, 1997). Although the process is clear, there is often a large gap between what "is" and what "should be" (Service & Loudon, 2010), and research has also shown that managers often include non-performance-related elements in the performance appraisal (Spence & Keepin, 2010). Even with its faults, MBO has been widely adopted across organizations of many types (for examples see Jain & Jain, 2015; Andrews & Chompusri, 2013).

One area of management by objective that has yet to be explored is the role of pressure in setting objectives for employees to complete. As noted previously, pressure can be a deceptive part of any work relationship; without taking its effects into consideration, a manager can unwittingly place undue and unintended pressure on employees. One purpose of this article is to help managers understand the role of pressure in the performance-appraisal context so that managers can more efficiently direct employees work and create the culture within the organization that is intended.

Previous research focused on the type of appraisal instrument (Daley, 1991) and the process of the appraisal interview or discussion (Orphen, 1997). This research focuses on the process of setting objectives during performance appraisal. In order for a performance appraisal to impact human performance, there are three questions, related to pressure, that need to be considered when an employee and a manager are setting objectives for the employee to complete. This is an area that is not typically part of the performance-appraisal process, but in



excluding it, managers are missing a key element that can influence performance and motivation. The three questions are

1. To what extent should employees experience compression?
2. To what extent should employees experience tension?
3. To what extent should employees experience cumulative pressure?

These are the same three questions that must be addressed when the employee's performance appraisal has been completed, so managers can better understand the role of pressure on performance. If a manager is intentional about the answers to these three questions, the pressure that is experienced within organizations can be intentionally built and skillfully managed. As a side benefit, the management by objective systems and performance appraisals systems will become more meaningful, efficient, and effective. Each of these questions will be addressed in order.

### To What Extent Should Employees Experience Compression?

Compression pressure pushes elements toward each other. In a work context, compression pressure is often felt when employees are asked to focus heavily on one task or one process for an extended period of time. This focus, coupled with intense responsibility to perform, can increase the amount of compressive pressure the employee experiences.

The positive side of compressive pressure is that it allows the employee to delve deep into a project or task and root out any errors or problems over an extended period of time. The drawback of compressive pressure is that it can create tunnel vision within the employee, even to the point that the employee's performance suffers from an inability to see opportunities or challenges from different perspectives. This tunnel vision works opposite the vision created by tension pressure in which the employee can see a problem from multiple viewpoints but does not have the expertise to take advantage of any one of them.

### To What Extent Should Employees Experience Tension?

Tension pressure pulls elements apart or pulls them in opposite directions. In a work context this can include requiring employees to complete tasks or projects that are not closely related to each other, or tasks that do not complement each other well. With the advent and expansion of technology, it seems clear that multitasking is not only normal but required.

*Managers should be keenly aware of the cumulative pressure employees feel and adjust work demands accordingly.*

It seems like a simple request to ask an employee to quickly get this assignment completed, then go on to something else, and then something else. If there is not a lot of continuity between the tasks, employees will feel stretched and their work can suffer. While there is not one answer to this question, it is critical that a manager be aware of how many directions the employee is pulled. If not the employee will feel frustrated and the work will become fragmented.

### To What Extent Should Employees Experience Cumulative Pressure?

As discussed, tension and compression create pressure on elements in two separate ways. There are separate outcomes for each type of pressure that manifests itself in the performance of employees. In addition to these separate elements, an astute manager will be keenly aware of the total pressure that an employee is feeling. There seems to be a zone of equilibrium in which an employee feels enough pressure of either type to perform well, but not so much cumulative pressure that it causes the employee to buckle. Managers must therefore step back and account for all the pressures an employee is feeling. On one end, an employee who feels no pressure will likely underperform as the employee feels no direction or accountability. Alternatively, an employee who feels too much cumulative pressure will likely buckle under the pressure and that employee's work performance and satisfaction will decrease. It is incumbent upon managers to carefully calculate the cumulative pressure felt by employees and make adjustments where needed.

### MANAGERIAL IMPLICATIONS

Hackman and Oldham (1980) outlined a job-characteristics model in which they identified the elements of a job that would lead to increased work performance. Elements included in this model were task identity, task significance, and task variety, all of which are essential to creating meaningfulness at work. If we explore the potential impact of understanding organizational pressure, we have expanded the theoretical explanation as to why task

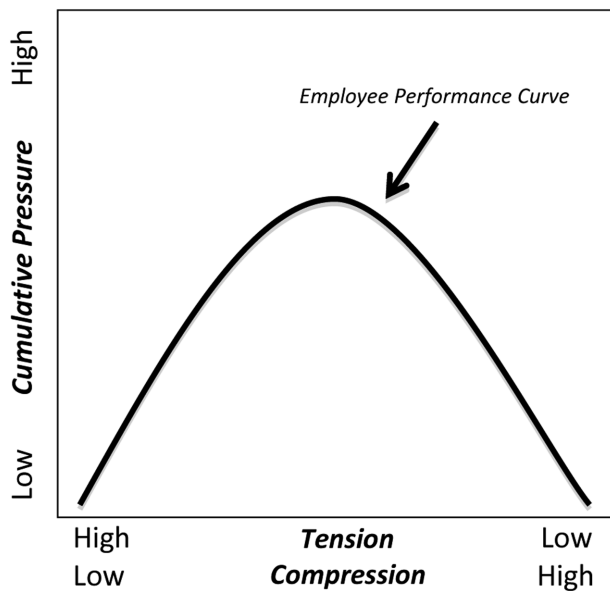


FIGURE 1. HYPOTHETICAL RELATIONSHIP BETWEEN PRESSURE AND PERFORMANCE

variety, significance, and identity influence the meaning found in work.

Think about this as a spectrum (see Figure 1). On one end are the employees who are pulled in so many directions that they can't complete any task well (high tension and low compression). At the other end are the employees who are very good at one thing but whose work suffers when they can't see alternative ways to improve what they do. There seems to be a happy medium, a point of equilibrium, where a manager can balance pressure in the employee/organization relationship. Finding that balance allows the organization and the employee to receive the benefits of enough compressive pressure to focus on mastering a task and enough tension pressure to remain open to change or new ways of doing things. Additionally, managers should be keenly aware of the cumulative pressure

employees feel and adjust work demands accordingly. By integrating the potent power of pressure into the human performance equation, managers can't help but improve the process.☀

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# TRAINING NEEDS ASSESSMENT OF HEADS OF ISLAMABAD MODEL SCHOOLS

Dawood Shah, PhD

The professional capacity of managers has always been a crucial factor in enhancing the efficiency and effectiveness of any organization. In the education sector, the education managers working at different administrative levels are responsible for the planning and management of educational institutions toward achieving the goals of the education sector. This article attempts to explore the capacity-building needs of the heads of Islamabad Model Schools in the context of their job requirements. Data were collected from 50 head teachers of Islamabad Model Schools through questionnaires and focus group discussions. In Islamabad Capital Territory, there is no education management cadre; therefore teachers are appointed as head of schools by virtue of their seniority. These heads usually lack the required management skills to manage an educational institution. Moreover, there are no arrangements for building the capacity of these newly appointed school heads to run these institutions. While managing the educational institutions, head teachers have to perform various important functions for which they need managerial skills. It has been discovered that head teachers needed training in different areas of management, including financial management, office management, personnel management, school improvement, planning, community participation, and computer literacy. The head teachers of Islamabad Model Schools need service management training in various areas of management to enhance the knowledge and skills they need to run educational institutions efficiently and effectively.

## INTRODUCTION

The professional capacity of managers has always been a crucial factor in enhancing the efficiency and effectiveness of any organization. In the education sector, the education managers working at different administrative levels are responsible for the planning and management of educational institutions toward achieving the goals of the education sector. Managerial training prepares education managers and head teachers to manage the institutional resources for effective implementation of government policies. Head teachers are considered as instructional leaders. Horng and Loeb (2010) argued that school leaders influence classroom teaching—and consequently student learning—by staffing schools with highly effective teachers and supporting those teachers with ef-

fective teaching and learning environments, rather than by focusing too narrowly on their own contributions to classroom instruction. Jenkins (2009) contended that instructional leaders involve themselves in setting clear goals, allocating resources to instruction, managing the curriculum, monitoring lesson plans, and evaluating teachers. Joubish and Khurram (2011) stated that good and successful leadership can play an important role to enhance administrative structure, management, and professional development.

One of the issues associated with school management in Pakistan is that head teachers define their role as administrative, which prevents them from contributing to the instructional development of their schools (Khan, 2013). Because the head teachers who achieve their

objectives are considered efficient, the efficiency of these managers has a positive impact on the functioning of an organization. The capacity building of head teachers is a crucial factor that affects the efficiency and effectiveness of an organization. Head teachers are responsible for the planning and management of educational institutions.

In Pakistan there is no education management cadre, especially in the provinces of Punjab, Balochistan, and Islamabad Capital Territory (ICT); as a result, teachers are appointed as managers through departmental promotion by virtue of their seniority. These managers usually lack the required management knowledge and skills to run the education departments and institutions successfully. Similarly, in the case of ICT, senior teachers are appointed as head teachers in the public education system. Seniority is the only criteria for such appointments. There is no mechanism for capacity building of these appointed head teachers, resulting in the loss of good teachers and inefficient head teachers (Capital Administration & Development Division (CA&DD), 2014). ICT Education Sector Plan 2014–18 has proposed “development and implementation of a systematic capacity building program for existing managers to provide them adequate management training” (Government of Pakistan, CA&DD, 2014, p. 41).

The identification and assessment of training needs is vital before designing management training program. Training needs assessment (TNA) is a review of learning and development needs within an organization. It considers the skills, knowledge, and behaviors that people need and how to develop them effectively (Lundberg, Elderman, Ferrell, & Harper, 2010; Chiu, Thompson, Mak, & Lo, 1999). A TNA is considered to be the foundation of all training activities. To deliver appropriate and effective training that meets the needs of individuals and the organization, and represents value for money, a TNA is essential (Reed & Vakola, 2006). There is general agreement in the literature that a TNA is a best-practice first step in the systematic approach to training (Reid & Barrington, 1999).

This systematic approach to training is the predominant model found in the literature (Reid & Barrington, 1999; Wills, 1998). It is described slightly differently, with varying stages and elements, but there are a number of core features to the approach. The systematic approach involves considering the linkages between the parts of the training process (Altschuld & Kumar, 2004).

There is an assumption that training must be planned in a cyclical manner and that this approach will lead to high-quality planned training (Khan & Iqbal, 2011; Reid & Barrington, 1999; Wills, 1998). Bartram and Gibson (1999) state that a “systematic approach to identifying

training needs ensures that people are offered opportunities to learn which are efficient and effective” (p. 107). All of the systematic approaches in the literature outline a number of steps in the process and cover similar basic elements, which include determining the training needs, designing (choosing) the appropriate methods to address the identified needs, planning (developing) the training courses/programs, and then implementing and evaluating them. The benefit of this approach is that nothing is omitted and there is a planned and professional approach to training development and delivery. It also provides the data necessary to justify or explain to senior management and key stakeholders what training is required, what budgets are needed, the relative spending breakdowns, and how all this will affect the organization (Wills, 1998; Anderson, 1994).

Khan and Iqbal (n.d.) identified the capacity building needs of district education managers in Pakistan, which included planning and management, service rules and regulations, communication and correspondence, maintenance of school records, and budgetary procedures. Shami and Hussain (2005) identified the training needs of district education managers of Pakistan, which included planning, management, financial management, supervision, and computer skills. Hussain and Zamair (2011) found that the majority of heads of secondary schools in Pakistan required training in financial management, curriculum management, office management, teacher management, human resource management, and general management. The study specifically identified training needs relating to planning, formulation of objectives, projecting and setting targets, designing strategies to achieve the objectives, effective implementation of decisions, procedures to utilize available resources in effective and efficient manner, performance appraisal of the staff, and procurement and preservation of the assets of a school. Bhatti, Jumani, and Malik (2015) found that training has upgraded knowledge of Pakistani educational managers by providing fresh developments about theories and concepts of education management. Similarly, the Academy of Educational Planning and Management’s (AEPAM) study discovered a positive impact of training on the performance of Pakistani education managers by enhancing the knowledge and skills related to their job requirements (Government of Pakistan, AEPAM, 2014).

Pakistan National Education Policy 2009 (NEP 2009) discussed the professional standards and expertise of education managers and head teachers working at various administrative levels. The NEP 2009 has stated that most of the education managers and head teachers are appointed from among the teaching cadre without much management experience. NEP 2009 has proposed the

establishment of an education management cadre and capacity building of education managers (Government of Pakistan, Ministry of Education, 2009). The head teacher's knowledge, skills, strategies, actions, beliefs, and perceptions are found to be the head teacher's most powerful tools for bringing about improvement in the schools (Qutoshi & Khaki, 2014).

Public-sector educational institutions in ICT are managed by Federal Directorate of Education (FDE). FDE functions spread over four rural and one urban zones. Each zone on average has between 70 to 100 education institutions. Two streams used to exist, namely model schools and federal government schools. The model institutions used English and were better resourced whereas the federal government schools used Urdu and were comparatively poorly resourced. To bring compatibility between these two streams of institutions, the FDE converted 50 federal government schools into Islamabad Model Schools in 2008. To determine the capacity-building needs of these converted schools, a TNA study was conducted. The study explored the capacity-building needs of the head teachers of Islamabad Model Schools in the context of their job requirements relating to planning, internal monitoring and supervision of schools, community participation, education leadership, governance, and financial and human resource management with the following objectives:

- Identify the capacity-building needs of the head teachers of Islamabad Model Schools.
- Suggest practical measures for in-service managerial training for the head teachers of Islamabad Model Schools to enhance the knowledge and skills they needed to manage schools efficiently.

## METHODOLOGY

### Participants

There were 422 public educational institutions in ICT in 2014–15, comprising 191 primary schools, 60 middle schools, 97 secondary schools, 43 higher secondary schools, 13 inter colleges, and 18 degree colleges (Government of Pakistan, AEPAM, 2016). The target population for this study was all the public schools functioning in ICT. However, the sample for this study was confined to 50 newly converted federal government schools into Islamabad Model Schools. The converted model educational institutions are mainly primary schools. Therefore, all the head teachers of these newly converted Islamabad Model Schools were included in the sample. All head teachers of

the sample schools were female. Out of the 50 head teachers, 23 head teachers had a master's degree in Art and Science with a bachelor's degree in Education (B.Ed.). The remaining had a bachelor's degree in Art and Science with B.Ed. A descriptive research design was adopted for this study.

### Data-Collection Instrument

To identify the capacity-building needs of the head teachers of these institutions, a need-assessment questionnaire was developed. The questionnaire asked respondents to identify (by ticking a box) the relevancy of various training topics in terms of *most relevant*, *relevant*, *least relevant*, and *not relevant*. The questionnaire was pilot tested and revised based on the pilot test results. The questionnaire was administered to the respondents, and they returned the filled-in questionnaires to the researcher. The questionnaire consisted of seven main components, and each main component contained several sub-components. The main components were as follows:

1. Basic information about the respondents
2. Financial management
3. Personnel management
4. School improvement
5. Planning
6. Community participation
7. Computer skills

The questionnaire response rate was 100%. The respondents were asked to rate sub-content areas in order of priority as per their job requirements. An open-ended question was included for head teachers to identify other areas in order of priority not covered under the main thematic areas. As a follow-up to the questionnaire, a focus group discussion was also held with the head teachers from a sample of schools.

### Data Analysis and Reporting

The completed questionnaires were coded, and data entry was performed. Data were tabulated and analyzed in light of the objectives of the study. A criterion in order of priority for training areas based on the responses of the head teachers was set. A high-priority area for training was fixed where 75% or more of respondents rated that area as "most relevant"; a moderate-priority area for training was established where 50% to 74% of respondents rated that area as "most relevant"; and a low-priority area for training was set where 49% or less of respondents rated that area as



**TABLE 1** FINANCIAL MANAGEMENT: SUB-TOPICS IN ORDER OF PRIORITY

S. NO	SUB-TOPICS IN PRIORITY ORDER	RATED AS MOST RELEVANT BY RESPONDENTS AS PER THEIR JOB REQUIREMENTS (RESPONSES IN PERCENTAGE)
1	Budget preparation	80
2	Delegation of power	80
3	Efficient funds utilization	76
4	Estimates of receipts/payments schedule of new expenditure (SNE)	76
5	Funds generation	76
6	Pension and leave rules and calculation methods	74
7	Audit and its purposes	74
8	Classification of accounts	72
9	Purchase and acquisition of store	72
10	Accounts and stock register	72
11	Allowances	72
12	Advance increments	72
13	Release of funds	70
14	Maintenance of account	60

“most relevant.” The results of data analysis are reported in the following sections.

## SURVEY RESULTS

### Financial Management

Finance is a crucial element of management. Therefore, it is a prerequisite for the managers who work at all levels (top, middle, or lower). Financial management includes financial analysis, costing and cost trends, projection of cost, budgeting, expenditures, payments, and audit.

Table 1 shows that budget preparation, delegation of powers, efficient funds utilization, estimates of receipt/payments, and funds generations were rated by more than 75% respondents as the most relevant areas for

their training. The respondents suggested some additional topics such as pay stoppage and release rules as well as general sale tax/income tax ratio for their training.

### Office Management

Office management deals with official matters such as communication and correspondence, maintenance of office records, service rules and regulations, performance evaluation, information processing, job description, implementation of organization policies, monitoring, and evaluation. As shown in Table 2, the participants rated 14 sub-topics out of 25 related to office management as “most relevant” for their training, based on their job requirements. Seventy-five to 80% of respondents gave high priority to areas such as general provident fund, service book, preparations of job description and analysis, suspension, group insurance, communication and correspondence, performance evaluation, pension rules, logbook, benevolent funds, contractual procedures, maintenance of the school’s record, and office layout for their training. The respondents also suggested some additional sub-topics related to office management for their training such as noting, drafting, lien rules, leave without pay, official correspondence, study leaves, and service rules.

Personnel management involves the ability to work with, understand, lead, and motivate other people to achieve the objectives of the organization. One of the main functions of a manager is to recruit employees and enhance their capacity to become valuable members of the organization. A manager must conduct job analyses, identify the right persons for recruitment, select the right people for the job, orient and train staff, appraise performance, resolve disputes, and communicate with all the employees. Various components relating to personnel management were incorporated in the questionnaire. Table 3 displays the results.

More than 75% of respondents rated leadership skills and styles, supervision, decision making, human resource management, orientation, training, and strategic human resource planning as the high priority areas for their training as per their job requirements. They also proposed additional sub-components of personnel management for their training, which included capacity building of employees, staff management, and use of motivational techniques to improve the output of low achievers.

### School Improvement

School improvement planning is a process through which schools set goals for improvement, then develop strategies for achieving these goals. The main objective of school improvement planning is to improve students’ achievement

<b>TABLE 2</b>		<b>OFFICE MANAGEMENT: SUB-TOPICS IN ORDER OF PRIORITY</b>
S. NO	SUB-TOPICS IN PRIORITY ORDER	RATED AS MOST RELEVANT BY RESPONDENTS AS PER THEIR JOB REQUIREMENTS (RESPONSES IN PERCENTAGE)
1	General provident fund	84
2	Services book	82
3	Preparations of job description	80
4	Job analysis	78
5	Suspension	78
6	Group insurance	78
7	Communication and correspondence	78
8	Performance-evaluation reports	76
9	Pension rules	76
10	Logbook and its importance	76
11	Contractual procedures	76
12	Maintenance of school records	76
13	Office layout	76
14	Benevolent funds	76
15	Leave rules	74
16	Retirement	74
17	Appointment, promotion, and transfer rules	72
18	Orientation training and placement	70
19	Last pay certificate	70
20	Meetings and report writing	70
21	Conduct and appeal rules	68
22	Time management	68
23	Maintenance of stock register	64
24	Removal ordinance 2000	62
25	Filing systems	60

<b>TABLE 3</b>		<b>PERSONNEL MANAGEMENT: SUB-TOPICS IN ORDER OF PRIORITY</b>
S. NO	SUB-TOPICS IN PRIORITY ORDER	RATED AS MOST RELEVANT BY RESPONDENTS AS PER THEIR JOB REQUIREMENTS (RESPONSES IN PERCENTAGE)
1	Leadership skills and styles	84
2	Supervision	80
3	Decision making	80
4	Managing change	78
5	Human resource management	78
6	Orientation and training	76
7	Strategic human resource planning and motivation	76
8	Employee training and career development	74
9	Conflict resolution	72
10	Collective bargaining process	70
11	Important environmental factors affecting human resource management	64
12	Good labor–management relations	62
13	Recruitment and selection	60

by creating a conducive environment for learning. Various components relating to school improvement were included in the questionnaire. Table 4 displays the results.

More than 75% of respondents indicated that they needed training in areas such as student’s diary, teacher’s diary, performance appraisal, examination/evaluation, morning assembly, evaluation of teachers, scheme of studies, lesson plan, and classroom management. Head teachers indicated that they also needed training in areas such as dealing and working with supporting staff, school beautification to make it attractive for students, and project-completion reports.

### Planning

For managers, planning is a rational process for setting objectives, choosing the most efficient and effective means

<b>TABLE 4</b>		
<b>SCHOOL IMPROVEMENT: SUB-TOPICS IN ORDER OF PRIORITY</b>		
S. NO	SUB-TOPICS IN PRIORITY ORDER	RATED AS MOST RELEVANT BY RESPONDENTS AS PER THEIR JOB REQUIREMENTS (RESPONSES IN PERCENTAGE)
1	Student's diary	80
2	Performance appraisal	80
3	Teacher's diary monitoring	78
4	Examinations/evaluation of studies	78
5	Morning assembly: purpose and benefit	78
6	Assigning duties to teachers	78
7	Scheme of studies	76
8	Lesson plans	76
9	Classroom management	76
10	Evaluation of teachers	76
11	Student/teacher timetable	72
12	Supervision and annual inspection	70
13	Co-curricular activities	66
14	Teachers' problems	66
15	Teacher associations	64

for pursuing them, and following with practical actions. Keeping in view the importance of planning, various functions related to planning were included in the questionnaire.

Table 5 shows that more than 75% of the respondents placed a high priority on training areas such as short- and long-term planning, preparation of project proposal, feasibility studies, setting priorities, identifying problems, project planning, future prediction, charts, data collection, concept clearance pro forma, planning and social changes, problem identification, migration trend, and planning evaluation and review techniques.

### Community Participation

The education of children is taking place not only in educational institutions but within families, communities,

<b>TABLE 5</b>		
<b>PLANNING: SUB-TOPICS IN ORDER OF PRIORITY</b>		
S. NO	SUB-TOPICS IN PRIORITY ORDER	RATED AS MOST RELEVANT BY RESPONDENTS AS PER THEIR JOB REQUIREMENTS (RESPONSES IN PERCENTAGE)
1	Short- and long-term planning	86
2	Feasibility studies	80
3	Setting priorities	80
4	Project proposals	80
5	Gantt chart	78
6	Future prediction	78
7	Project planning	78
8	Identification of problems	78
9	Different types of forecasts and benchmarking	76
10	Data collection and use	76
11	Designing a concept clearing pro forma	76
12	Educational planning in context of social changes	76
13	Migration trend and education planning	76
14	Planning evaluation and revision technique (PERT)	76
15	Planning at school/college level	74
16	Environmental scanning	74
17	Monitoring and evaluation	72

and society. Various groups such as parents, the community, school administration, and society are involved in their education. Schools are institutions that can prepare children as future citizen by equipping them with the required knowledge, skills, and societal norms to contribute to the improvement of society. Schools cannot function in isolation without the participation of the community

TABLE 6		COMMUNITY PARTICIPATION: SUB-TOPICS IN ORDER OF PRIORITY
S. NO	SUB-TOPICS IN PRIORITY ORDER	RATED AS MOST RELEVANT BY RESPONDENTS AS PER THEIR JOB REQUIREMENTS (RESPONSES IN PERCENTAGE)
1	Funds generation techniques	76
2	Community participation	70
3	Community's role educational development	68
4	Educational planning and management at school level through school-management committees (SMCs), parent-teacher associations (PTAs)	68
5	Community role in primary education	66
6	SMC/community and financial management in school	66
7	Village councils committee	64

and society. Since each group plays a different role in contributing to children's education, there must be a close liaison among these groups to maximize their contributions. Education takes place most efficiently and effectively when these different groups of people collaborate with each other. Therefore, there is a need to establish a strong partnership among various stakeholders such as schools, parents, and communities for improvement of education (Uemura, 1999). In the case of Pakistan where financial resources are scarce, the involvement of the community in the development of education is essential. However, securing community participation is not an easy task. Therefore, the head teachers were asked to identify areas for their training related to community participation. Their responses are reported in Table 6.

As shown in Table 6, only one sub-component related to community participation—funds generation—was rated by more than 75% of respondents as the most relevant area for their training.

TABLE 7		COMPUTER LITERACY: SUB-TOPICS IN ORDER OF PRIORITY
S. NO	SUB-TOPICS IN PRIORITY ORDER	RATED AS MOST RELEVANT BY RESPONDENTS AS PER THEIR JOB REQUIREMENTS (RESPONSES IN PERCENTAGE)
1	Use of computers in educational planning, management, administration, and financial management	78
2	MS Office (Word, Excel, PowerPoint, internet, and email)	76

### Computer Literacy

Computer skills and understanding are critical for education managers, who are expected to use computer technology in handling both academic and management aspects of educational institutions. Overall, more than 75% of respondents placed a high priority on the use of computers in educational planning and financial management as well as familiarity with MS Office for their training (see Table 7).

### Focus Group Results

During the focus group discussion, the head teachers reported that there were no arrangements for in-service managerial training in ICT. This is because head teachers face many problems in handling managerial and financial matters. They opined that while coming from the teaching profession, they do not possess the required managerial skills necessary for the smooth functioning of educational institutions. They pointed out that while the Academy of Educational Planning and Management conducts managerial trainings for education managers across the country, only a limited number of education managers from ICT get an opportunity to participate in these training programs. They were of the view that the Federal Directorate of Education has not yet established an education cadre, despite clear cut provisions in NEP 2009 to do that. Due to the nonexistence of an education cadre, senior teachers are appointed as head teachers without any proper management training, which negatively affects the performance of educational institutions.

## DISCUSSION

Usually, the head teachers in ICT are appointed on a seniority basis to run educational institutions. Unfortunately, newly appointed head teachers lack adequate preparation and backup support. Therefore, management-training courses can help prepare them to maintain a high standard of professionalism while performing management and leadership responsibilities and informed decision making.

The TNA's results for financial management were consistent with the findings of Shami and Hussain (2005) and Hussain and Zamair (2011). Similarly, the findings for personnel management and school improvement were consistent with the fore-mentioned studies, as well as those of Khan and Iqbal (n.d.). Community participation is considered to be an important component of school education because community and schools cannot work in isolation. The community is easily available resource that can be harnessed for school improvement. In the case of Pakistan, where financial resources are scarce, the involvement of the community in generating resources is essential. However, securing community participation is not an easy task because it requires knowledge and skills. Therefore, head teachers have identified fundraising through community participation as the high-priority area for their training.

Since there is no education management cadre in ICT, the most senior teachers are appointed as head teachers who usually lack the required management skills to manage educational institutions effectively. Moreover, there are no institutional arrangements for management training of these newly appointed head teachers to run these institutions, resulting in a poor quality of education. While managing the educational institutions, head teachers are required to perform various important management functions for which they need managerial skills. It has been discovered that head teachers needed training in different areas of management. The study had identified high-priority areas for the training of the head teachers; these include five sub-areas related to financial management, 14 sub-topics related to office management, seven sub-areas related to personnel management, nine sub-areas pertaining to school improvement, 14 sub-areas related to planning, one sub-area related to community participation, and two sub-areas related to computer literacy.

It is recommended that service management training be arranged for the head teachers of Islamabad Model Schools in the high-priority areas as identified by them. The training programs may be conducted during summer vacation, and the duration of training may be at least six weeks. Moreover, training materials such as manu-

als and modules should also be developed and given to the trainees during the training programs. In addition, an education management cadre should be established to improve the efficiency and effectiveness of educational institutions in ICT. The management cadre should specify job description, service structure, and rules. Service rules should clearly delineate induction procedures for the education-management cadre through direct recruitment and promotion from the existing teaching staff. ☀

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# AS A LEADER IN A POLITICALLY CORRECT DIVERSE WORKPLACE, HOW DO YOU ESTABLISH A CULTURE OF RESPECT?

Eileen Maeso, CPT

This article deals with how, in a politically correct world, everyone can establish a culture of respect. As good performance professionals who work with a diverse population, we need to take on the role of leaders and hold people accountable for their behavior and actions. Techniques are given to establish and maintain a respectful culture and how to deal with those environments that are not.

HOW DO YOU establish a respectful culture, and how do you deal with environments that do not have one? An employee job satisfaction and engagement survey (SHRM, 2016) found the most important indicator of job satisfaction (67%) was the “respectful treatment of all employees at all levels” (p. 14). Furthermore, according to Merelli (2016), 77% of people in the U.S. answered positively to questions relative to their well-being at work. Some of the key factors included a “combination of work environment, appreciation, and emotional fulfillment” (para. 2). Good leadership is what makes the difference between a respectful culture and one that is not.

Kouzes and Posner (2012) describe five practices of exemplary leadership as:

1. Model the Way
2. Inspire a Shared Vision
3. Challenge the Process
4. Enable Others to Act
5. Encourage the Heart

While these five practices are noteworthy, I believe the most important element of leadership is missing from this list: Know your people. How can you lead if you don't really get to know your people? Among many other

attributes, effective leaders are honest, put their people before themselves, and have good communications skills. Establishing trust with people, especially in the human performance technology (HPT) profession, requires getting to know them. Adding even the smallest amount of a personal relationship to a business relationship can amplify trust and communication, which can yield great returns in future encounters both good and bad. So why are disrespectful environments and toxic leadership allowed to continue?

An observant leader should notice when there is something amiss but might not be able to put her finger on it. As HPT practitioners, it is our job to notice and to determine the root cause of issues. An HPT practitioner must be able to see what even the best leader can't. A good leader, however, will get to know their people and show them respect. A good leader will ask direct questions when they find inappropriate behavior or receive reports of the same, and will hold themselves and others accountable. A good leader will try to analyze the situation to determine the root cause of the problem, but if they can't figure it out, they may call an HPT professional in for assistance.

As HPT professionals, we can identify the difference between symptoms and causes and the impact of misalignment of practices. We look at the whole system and the culture of the organization, not just the leader. Performance improvement includes creating culture and defining leadership. As leaders in the performance field, we need

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## *Have the courage to do something! Don't just do things right, do the right thing!*

to be cultural change leaders as well. According to Drucker (2001), “management is doing things right; leadership is doing the right thing” (p. 77). I believe that everyone is a leader, no matter what level position they hold. As leaders, we need to continue to set the example. Lead by doing. Don't expect others to do the right thing, if we're not willing to do the same. Don't just talk the talk, walk the walk.

Let me outline the establishment of a culture of respect in straightforward terms, based on my experience as a performance analyst and cultural change agent. With these five guidelines, establishing a respectful culture and maintaining it can be painless:

1. Show good leadership by being ethical, setting the standards, acting with integrity 24/7, and valuing people.
2. Be accountable by holding yourself and others responsible for behavior and actions.
3. Show respect to all; it is essential.
4. Communicate your expectations of a respectful workplace constantly.
5. Have the courage to do something! Don't just do things right, do the right thing!

Meshanko, (2015), states:

It starts with leadership. Leaders in respectful organizations encourage employees to intentionally engage those who are different, to institutionalize the curiosity to explore differences and to refrain from damaging, judgmental, and exclusive behaviors. Fostering respect is not a program or project. It is a way of life that must be clearly defined, communicated, and modeled from the top down (para. 7).

And in his list of five steps of his quick primer in the same article, he suggests to “hold people accountable. Add behavioral metrics to everyone's performance appraisal ... and make them count for something. If there is no tangible reason for managers and associates to change behaviors, most will not” (para. 4).

Daniels (2016) talks about solutions to toxic leaders:

Organizations should be vigilant about finding toxic managers. Every effort should be made to help them change their behavior. Take heed—it will likely be difficult because of their long history of receiving positive reinforcement for their toxic behaviors. Those who understand human behavior know that the current contingencies of reinforcement maintain those behaviors and when the contingencies change, the behavior will change (para. 4).

**“I DON'T WANT TO RUIN HIS CAREER.”**

**“SHE MIGHT BRING AN EEO SUIT.”**

Seems easy and logical, right? Just hold people accountable for their behavior and actions. So how do we get there? In today's politically correct world, many seem to be afraid to hold people accountable for fear of being considered prejudiced or of possibly ruining someone's career: “I can't call him out, I might ruin his career” or “I can't possibly correct her for her behavior because she might say I am doing it only because she is female.” As long as you are creating a workplace as outlined above, you should not have to worry about it. I know there are those who say that they might end up with an equal employment opportunity complaint if they call someone out for their inappropriate behavior, and I say that most of the time this is rubbish. If you are indeed showing all employees respect and have created a culture where people can openly discuss issues, feel valued, and know they will be held accountable, you shouldn't have to worry.

If on the other hand, your environment is one where people are afraid of you, you show no respect except for a chosen few, you take credit for the work of your employees, you make inappropriate jokes and tell inappropriate stories, you scream, rant and rave, and you show people that if they complain there will be retaliation—well, maybe you need to worry! As far as ruining someone's career, people are responsible for their own behavior and actions. As a supervisor or employee, your job is to make sure the environment is a positive one. Everyone in the workplace has this responsibility. However, the leader is the one that sets the standards. If leadership doesn't do anything about poor behavior, then no one else in that environment will either.

### **WHAT IF THE BOSS IS THE PROBLEM?**

All companies and organizations have rules, processes, and procedures. As performance professionals, we need to look at how these are affecting the culture and how the culture affects performance. What procedures are not

## *Tyrant boss? What if it is the boss that is the problem? Everyone has a boss.*

being followed and why? Are there consequences for not following the rules, or does everyone just brush it off as the latest human relations fad? Once this is identified, the burden becomes documentation and discussions, possibly with the management that is creating the culture. It is easier to speak out if you have concrete evidence of performance issues.

So, what if you are an employee in a toxic environment? How do you call out the tyrant boss? Having worked many years in military and commercial workplaces, I understand chain of command. Everyone has a boss, and if you can't go to your boss, or your boss is the problem, go higher until you find someone to listen. If the bullying at your boss's hands becomes too much, you can go to your HR department or to the CEO of your company. Walk up to the desk of the CEO's assistant and say, "I need to talk with the CEO about an urgent matter," per Ryan (2015). The great thing about a politically correct world is people are more sensitive to issues and are more likely to take corrective action. Get involved, but understand consequences. Yes, I am sorry to say, there are always consequences for getting involved. However, I am happy to say that the consequences are usually very positive and can be life-changing for the person you are supporting. You are the only one who can determine if it is worth getting involved. As a leader, create a culture where people feel comfortable speaking out against wrongs and ensure there is no retaliation for speaking out. As Ryan (2015) continues in her article:

Just keep in mind that bullies are very good at what they do. They bully their employees, and they may bully their HR colleagues too. Bully bosses have a force field of fear around them. That's why so often even his or her bosses don't intervene to stop the bad behavior. The boss may be afraid of your bully manager too! (p. 5).

The reality is that retaliation does exist. Why not change that reality? We all have the ability to do it.

Now, I am not suggesting that you call the boss out in a meeting or in front of others. Treat others, including the boss, the way they want to be treated. This is not the Golden Rule, because they might want to be treated differently than you would—instead, it is the Platinum Rule. Some guidelines are:

1. Be respectful.
2. Discuss in private.
3. "Call out the behavior, not the person, and spell out what you want to change" as suggested by Felix (2008, para. 19).
4. Document your conversation; send an email to your boss as a thank you for listening, and explain your understanding of the outcome of your meeting. This works with coworkers as well.
5. If this doesn't work, go to the boss's boss.

### USE YELLOW AND RED CARDS

Some situations allow for a delayed response, as outlined above; however, if you witness unacceptable or inappropriate behavior (e.g., a prejudiced comment or blatant sexual comment), you need to toss up a verbal yellow card right then and there.

For those who are not familiar with soccer, a yellow card is a warning, and a red card means you are evicted from the game—you are out! I have seen this technique in action in the workplace, and it makes confronting someone less threatening and stops the inappropriate behavior immediately. You take the time to teach the terms, then simply state "that is a yellow card" when confronted with inappropriate behavior. I have even heard people correct *themselves*; they slip and say something inappropriate and immediately say, "Oh no, that was a yellow card, I am sorry!" Those simple words let the person know their comment is totally inappropriate and puts them on warning.

If the behavior continues, you have spoken with the offender or don't feel comfortable confronting him or her, then you need to take it up a level. Remember, everyone has a boss.

Whether the offender is a subordinate, peer, or supervisor, you need to find respectful ways to say, "Hey, what you are doing is wrong and I expect this behavior to stop." Ask yourself: would you speak out if the behavior was directed toward you? Would you stand up for your coworker or not get involved? Set the example by being a leader and doing the right thing. You don't have to be their boss to hold them accountable.

### DON'T LIKE CONFLICT? NO ONE DOES.

#### FIND SOMEONE TO HELP

I have personally been in a situation where a very high-level individual was making very inappropriate comments. As the person was outside my direct environment, that person did not understand the yellow card concept.

*As a leader, create a culture where people feel comfortable speaking out against wrongs, and ensure there is no retaliation for speaking out.*

Since I am uncomfortable with conflict, as most people are with someone at that level, I chose to go to my boss, who helped correct the situation. You can always find someone who can help you.

There are a lot of ways to deal with bullies, difficult people, and so on. There is a lot of great research, but the bottom line is to use kindergarten 101: *Be kind and treat everyone with respect*. If you follow that simple rule, it works. In my naïve years, I used to think, “Well that person is just having a bad day.” Unfortunately, however, there are people who are just malicious and who thrive on harassing others—and sometimes they are leaders who want nothing but to maintain their power. These offenders don’t always look like typical bullies and can be the best of the best at what they do. Some are master manipulators. I still believe they are few and far between, and most people want to do the right thing, but those who are just evil may not be helped using the techniques outlined here, but you can try. Many people have learned a hard lesson in life: Don’t be a victim! Stand up for what is right! You, too, can report this behavior and find someone who will listen. If that doesn’t work and they are not held accountable, have faith that they will eventually get their just rewards in life.

With that said, if you are a leader, it is your responsibility to hold people accountable for their actions. It is not easy, and you don’t want to ruin anyone’s career because you are a kind, respectful person. The reality is, if you don’t hold them accountable, they will continue on that path and it is one of destruction for all who come in contact with them. Yeager and Yeager (2016) explain bullying as:

Any behavior that causes (or should cause) another person to reasonably feel intimidated, demeaned, insulted, threatened, and/or powerless. Often, the behavior is designed to be destructive and/or elicit these feelings. Bullying is often motivated by “normal” psychosocial factors (“Building Blocks”), but are inappropriately carried out at someone else’s expense (slide 29).

Daniels (2016) explains that toxic bosses “exhibit the kind of behavior that proves detrimental to an employee

personally, to their performance, and to the culture of the organization. In essence, they are nothing more than workplace bullies who use their perceived power to control others” (para. 1).

According to Iliades (2011), effects of not holding people accountable can be devastating:

Repeated bullying—whether it occurs between bosses and employees, between spouses, or in any adult relationship—is a form of traumatic stress that is toxic to one’s emotional health. In fact, the effects of bullying have been linked to post-traumatic stress disorder (PTSD), a trauma-induced anxiety disorder (para. 7).

Bullies will continue their behavior until someone stops them. Stand up and stand tall. It takes courage. Thomas Jefferson said, “One man with courage is a majority” (Quotes.net, 2017). Do not accept poor behavior because, as Lieutenant General Morrison of the Australian Army said, “The standard you walk past is the standard you accept” (Morrison, 2013).

Creating a safe respectful environment is something for which everyone is responsible. Whether in a politically correct environment or not, hold people accountable and create an environment where everyone is shown respect. This is how everyone contributes to establishing and maintaining a culture of respect.

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# INDIANA UNIVERSITY'S IST PROGRAM: AN INTRODUCTION

Yeol Huh, PhD | Sung "Pil" Kang, PhD Column Editors

LOCATED IN ONE of the most beautiful college campuses in the nation, the Instructional Systems Technology (IST) program at Indiana University Bloomington is one of the first such programs in the United States to be implemented, and it is generally considered to be one of the best available programs in the field of instructional technology and human performance technology. The IST program offers comprehensive degree options from residential PhD and master's to online Ed.D., master's, and certificate covering the needs of various populations who are interested in becoming researchers or fac-

ulty in higher education settings or becoming practitioners in the field. The Ed.D. program is the first doctorate degree in the university system to be offered completely online.

IST has a strong body of faculty with various research interest and focus areas, and they are running their own research groups with doctoral students. IST faculty are currently working on revamping its master's degree programs to better emphasize a studio experience; it is also refining its Ed.D. program as well as seeking to establish synergy with its adult education program. 🌅

# IMPROVING HUMAN LEARNING AND PERFORMANCE AT INDIANA UNIVERSITY

Yonjoo Cho, PhD | Elizabeth Boling, MFA | Kyungbin Kwon, PhD

The Indiana University Instructional Systems Technology statement of purpose is, “We improve human learning and performance in diverse contexts.” Our focus on learning and performance improvement includes K-12 schools, higher education, business, industry, the government, military, and non-profit organizations. This article gives an overview of the IST’s background and history, key program elements (academic degree programs and leadership development programs), faculty’s research and development activities, diverse students demographics and esteemed alumni (academics and practitioners), and future directions. We have led the instructional technology field through our commitment to remain a quality and forward-thinking program.

## INSTITUTIONAL INFORMATION

Founded in 1820, Indiana University (IU) will celebrate its bicentennial in 2020. IU Bloomington (IUB) is the “flagship of IU’s eight campuses statewide and is committed to full diversity, academic freedom, and meeting the changing educational and research needs of the state, the nation, and the world” (Indiana University, 2015). The Bloomington campus (Figure 1) enrolls approximately 48,500 students taught by 3,050 faculty and offers associate, bachelor’s, master’s, and doctoral degrees in both residential and online formats (Indiana University, 2015).

### Program Identity

Instructional Systems Technology (IST), housed as an independent department within the School of Education on the IUB campus, is one of the first programs of its kind established in the United States and is said to be well regarded throughout the world (Figure 2).

The IST statement of purpose covering all our programs is, “We improve human learning and performance in diverse contexts.” Our focus on learning and performance improvement includes K-12 schools, higher

education, business, industry, government, military, and nonprofit organizations.

The word *technology* in our name encompasses methods such as analysis, design, development, and evaluation of products, processes, systems, methods, and theories as well as designed systems for learning themselves—not simply digital and analog hardware and software. IST takes a holistic look at how to improve teaching and learning through the study and design of learning environments and interventions for performance. Our collective efforts, combined with the experiences of our faculty, enable us to give students the best possible preparation for work in the field of instructional technology and beyond. IST faculty, in collaboration with students in their research groups and classroom projects, analyze learning environments, evaluate the effectiveness of learning and performance in organizations, and study the technologies that can make learning and performance more effective and powerful and how they may do so.

### Program History

Historically, IST at IU has long been a leader in the field and in its scholarship since its inception. IST evolved from an audio-visual education program that offered master’s and doctoral degrees by 1946. This academic pro-

*IST takes a holistic look at how to improve teaching and learning through the study and design of learning environments and interventions for performance.*

gram grew out of a campus service program where courses were taught by the Audio-Visual Center staff with academic qualifications. Increased support by the federal government for education in science and technology led to the adoption of the name Educational Media in 1959, and this name change reflected the term favored by the U.S. government. The Educational Media division at IU adopted a *systems view* of education in 1969 and changed its name to the current Instructional Systems Technology. By 1972, the IST curriculum was organized around several emphasis areas: message design, instructional design/development, evaluation and integration, systems design and management, and diffusion/adoption, which are all elements in a *systems view* of education. These themes resonate in the research and theory emphasis areas of IST today and converge in the research and teaching enterprise of improving learning and performance (Haynes & Cho, 2013, p. 27).

IST's current efforts on building the history of the program is also summarized as, "We continuously make efforts toward pushing and collapsing boundaries of the field through theoretical diversity, which has fostered innovation and continued transformation in our program" (Haynes & Cho, 2013, p. 28).

## ACADEMIC PROGRAMS AND REQUIREMENTS

In addition to our role of preparing pre-service teachers to integrate technology into their practice, we prepare graduates of our program for such roles as instructional designers and corporate trainers, change-management specialists, academic researchers, entrepreneurs in teaching and learning contexts, and as technology leaders in schools. Our alumni work across governmental, corporate, educational, and military contexts.

We offer both residential and online degrees in IST including IU's first online-only doctorate, Ed.D. (Doctor of Education) in Instructional Systems Technology, from which we graduated the first Ed.D. recipient (Gina Ander-

*Historically, IST at IU has long been a leader in the field and in its scholarship since its inception.*

son) in Spring 2015. She reflected: "All the courses that I took really had immediate, direct application into what I was doing and practicing in my career. When I was in a class I would focus on the elements I thought would help me specifically in making those practical applications."

Not only are we one of the leaders in the field providing residential degrees, we were pioneers in Indiana University's entry into online learning environments; we now offer students the option of completing a certificate, master's, or doctoral degree online (Figure 3).

Table 1, which follows, provides detailed information on degree programs, and Table 2 introduces the IST master's core courses taken by master's students and doctoral students with non-IST majors.

## Key Program Elements

The hallmark of our programs is continuous improvement and innovation. From moving online to offer an intensively project-based master's degree almost 20 years ago, to completely restructuring the PhD (Boling, 2008) almost 10 years ago, and launching a fully online doctorate



FIGURE 1. IU SAMPLE GATES: MAIN ENTRANCE TO THE INDIANA UNIVERSITY BLOOMINGTON CAMPUS

almost 5 years ago, the faculty are always examining where and how we need to improve what we are doing now and move forward. We detail key elements of degree programs and leadership/professional development in IST in the list that follows.

### Degree Programs

The degree programs that are offered include the following:

- **Certificate program:** This five-course online program includes the full core of our master's program as an accessible entry point into the master's (no GRE required for application; GRE waived for the M.S.Ed. application with a 3.5 GPA in the Certificate) or a stand-alone credential for professionals adding instructional design and performance improvement to their resumes.
- **Master's degree:** The online program leads to a generalist degree within which electives inside and outside the major are used to concentrate on various skill dimensions. The online and campus programs both require a professional portfolio, which serves as a vehicle for career advising and job seeking. The campus program requires six hours of internship credit, often

*The hallmark of our programs is continuous improvement and innovation.*

comprising two internship placements of three credits each (minimum 80 hours work per credit hour) to give students without appreciable workplace experience a chance to integrate and apply their learning in a real-world context.

- **Ed.D. degree:** This program requires a minimum of a 30-credit master's degree for admission. Students with a master's outside the field take some or all of the core classes in the program as part of the required courses in the major. Students minor in one of several areas outside the program—frequently Adult Education. A residency requirement that comprises attendance at the department's in-house conference, a two-day qualifying exam, and an in-person dissertation defense bring these students on campus and face to face with advisors as well as fellow students. Dissertations in this program



FIGURE 2. THE WENDELL W. WRIGHT SCHOOL OF EDUCATION ON THE INDIANA UNIVERSITY BLOOMINGTON CAMPUS

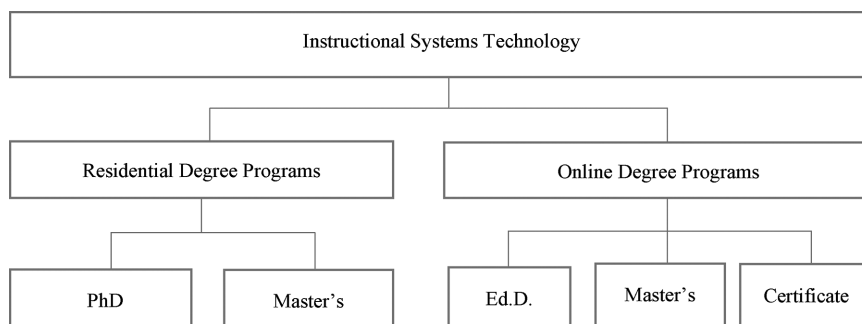


FIGURE 3. IST'S ACADEMIC DEGREE PROGRAMS



**TABLE 1** IST'S ACADEMIC DEGREE PROGRAMS AND REQUIREMENTS

DEGREE	RESIDENTIAL PROGRAMS	ONLINE PROGRAMS
<b>Doctoral</b>	<p><b>PhD in IST</b> is designed for students seeking to be researchers in the field. This residential doctoral program prepares PhD students to discover new knowledge through basic research and to answer specific questions about practical problems through applied research. PhD graduates typically conduct research and teach in university settings or work as researchers within private and public research and development centers in the field. To enter this 90-credit-hour PhD program, students must have completed a bachelor's degree program from an accredited institution. Students admitted without a master's degree in IST are required to complete the IST master's core (see Table 2) early in their program of studies. All doctoral students are required to study full time and to be active members of the academic community.</p> <p><b>Minor in IST</b> allows doctoral students in other fields to gain an understanding of the instructional-design process, implementation, and assessment of technology for learning and performance in complement to their doctoral major.</p>	<p><b>Ed.D. in IST:</b> Started in 2011, this first IU online doctorate program is offered completely online and is designed for students who will apply research findings to solve practical problems with the goal of producing interventions for education and the workplace. Students will also learn research skills to conduct needs analyses, formative evaluation, and usability testing and to measure learning outcomes and performance improvement on the job. This 60-hour degree program requires an earned master's degree to enter and prepares students to take on leadership roles in organizations where instructional and performance technology is a key part of their mission. Online doctorate students are required to make at least three trips to the IUB campus: (a) to attend one of the annual IST conferences held every spring that feature presentations by students, faculty, and alumni; (b) to take qualifying exams; and (c) to complete a dissertation defense in person.</p>
<b>Master's</b>	<p><b>M.S.Ed. in IST</b> is focused on preparation for practice in the field. The 36-credit-hour program includes coursework, a six-credit internship requirement that offers a bridge to practice, and a year-long studio project conducted under faculty supervision. Upon graduation, students will become practitioners in the field of instructional technology.</p>	<p><b>M.S.Ed. in IST:</b> Started in 2000, this 36-credit-hour, three-year program includes a portfolio workshop where students will get hands-on experience in developing portfolios as well as core courses (see Table 2). Over time, enrollments in this program have significantly increased. Upon graduation, students will become practitioners in the field.</p>
<b>Certificate</b>		<p><b>Certificate in IST:</b> The 15-hour certificate program introduces students to instructional technology and instructional design including analysis and evaluation of learning and performance, emerging technologies, and strategies for computer-mediated learning.</p>

**TABLE 2** MASTER'S CORE COURSES

COURSE TITLE	SEMESTER
Instructional and Performance Technologies Foundations	All Year Around
Instructional Design and Development I	Fall
Instructional Development and Production Process I	Spring
Evaluation and Change in the Instructional Development Process	Spring
Analysis for Instruction and Performance Improvement	Fall

- **PhD degree:** The PhD program requires students to join one of the research groups headed by members of the faculty and to begin to build a professional dossier including evidence of research, teaching, and service competencies at the outset of their programs. A series of seminars brings the students together in a multi-year exchange of scholarship. The IST department requires them to produce a first-authored study and to present the major milestones in this seminar. Students' dossier is reviewed three times as a qualifying exam, with the second review including an oral presentation to the full department, response to external reviewers, and a pass/fail/conditions vote of the full faculty. By the time of graduation, most have achieved multiple publications and conference presentations.

are expected to be framed as applied studies and are encouraged to be set in the student's workplace.

### Leadership/Professional Development

- Research groups, dossiers, and portfolios incorporated into the programs are primary vehicles for professional

**TABLE 3** IST CORE FACULTY (IN ALPHABETICAL ORDER)

FACULTY NAME (TERMINAL DEGREE, GRADUATION)	RESEARCH INTEREST	RESEARCH GROUP/PROJECT	PUBLICATION (MOST RECENT)
Elizabeth Boling (MFA, Indiana University): Professor and Associate Dean for Graduate Studies in the School of Education	Design, use of images in instructional materials	My research group is completing a study in which we seek to discover the core judgments of practicing instructional designers or the tacit philosophies they hold regarding design. Our lens is drawn from Nelson and Stolterman's (2011) <i>The Design Way</i> as well as the broader literature on the nature of designing, design thinking, and design practice. The group is working as part of a larger agenda examining the dimensions of practice in this field that have received little attention in research or pedagogy.	Boling, E., Gray, C., Dagli, C., Demiral-Uzan, M., Ergulec, F., Tan, V., Altuwaijri, A., Gyabak, K., Hilligoss, M., Kizilboga, R., & Tomita, K. (2015). Judgment and instructional design: How ID practitioners work in practice. <i>Performance Improvement Quarterly</i> , 28(3), 25-49. Boling, E., & Gray, C. (2015). Designerly tools, sketching, and instructional designers and the guarantors of design. In B. Hokanson, G. Clinton, & M. W. Tracey (Eds.), <i>The Design of Learning Experiences</i> . New York, NY: Springer.
Curtis Bonk (PhD, University of Wisconsin): Professor	Collaborative and emerging educational technologies	My research is focused on looking at life change from open learning (e.g., open educational resources (OER), OpenCourseWare (OCW)), massive open online courses (MOOCs)) and other new forms of educational delivery. The past two years, I have published several works on flipped classroom approaches and the use of open educational resources in China. I am currently exploring instructor personalization of MOOCs as well as something that I am calling Education 3.0 that involves new roles of instructors in blended learning environments.	Bonk, C.J., Lee, M.M., Kou, X., Xu, S., & Sheu, F.-R. (2015). Understanding the self-directed online learning preferences, goals, achievements, and challenges of MIT OpenCourseWare subscribers. <i>Educational Technology and Society</i> , 18(2), 349-368. Reeves, T.C., & Bonk, C.J. (2015). MOOCs: Redirecting the quest for quality higher education for all [Special Issue: MOOCs and Open Education]. <i>Journal on E-Learning</i> , 14(3), 385-399.
Thomas Brush (PhD, Indiana University): Professor and Barbara B. Jacobs Chair in Education and Technology	Promoting inquiry-oriented learning, cooperative, collaborative, and problem-based learning strategies into learning	The PBL-Tech team investigates uses of technology to support learner complex problem-solving in problem- and inquiry-based learning settings. This group has PIH-Net (the Persistent Issues in History Network), led by Dr. Brush, and SSI-Net (the Socioscientific Inquiry Network), led by Dr. Glazewski. Our work typically takes place in K-12 classrooms and has implications for teachers and teacher-educators.	Callahan, C., Saye, J., & Brush, T. (2015). Supporting in-service teachers professional teaching knowledge with educationally scaffolded digital curriculum. <i>Contemporary Issues in Technology and Teacher Education</i> , 15(4). Brush, T., & Saye, J. (2014). An instructional model to support problem-based historical inquiry: The persistent issues in history network. <i>Interdisciplinary Journal of Problem-Based Learning</i> , 8(1).
Yonjoo Cho (PhD, University of Texas at Austin): Associate Professor	Action learning in organizations, human resource development (HRD), women in leadership	Online teaching and learning has surfaced as an emerging research topic in the field from the group's reading in the previous year. We are conducting research on online master's core classes in IST using the needs-assessment process. The purpose of this research project is to investigate what are the needs of IST faculty who have taught and students who have taken five online master's core classes. In this year-long research process, students are expected to learn how to conduct research and become a scholar. In addition, I lead a book project on <i>Current Perspectives on Asian Women in Leadership</i> with Palgrave Macmillan.	Cho, Y., & Zachmeier, A. (2015). HRD educators' views on teaching and learning: An international perspective [Special issue]. <i>Advances in Developing Human Resources</i> , 17(2), 145-161. Cho, Y., Park, S., Jo, S.J., & Suh, S. (2013). The landscape of educational technology viewed from the ETR&D journal. <i>British Journal of Educational Technology</i> , 44(5), 677-694.

(Continued)

TABLE 3

Continued

FACULTY NAME (TERMINAL DEGREE, GRADUATION)	RESEARCH INTEREST	RESEARCH GROUP/PROJECT	PUBLICATION (MOST RECENT)
Krista Glazewski (PhD, Arizona State University): Associate Professor	Problem-based learning	The PBL-Tech team investigates uses of technology to support learner complex problem-solving in problem- and inquiry-based learning settings. This group has PIH-Net (the Persistent Issues in History Network), led by Dr. Brush, and SSI-Net (the Socioscientific Inquiry Network), led by Dr. Glazewski. Our work typically takes place in K-12 classrooms, and has implications for teachers and teacher-educators.	Glazewski, K. Shuster, M., Brush, T.A., & Ellis, A. (2014). Conexiones: Fostering technology-enhanced socioscientific inquiry in graduate teacher preparation. <i>The Interdisciplinary Journal of Problem-Based Learning</i> , 8(1). Ertmer, P.A., & Glazewski, K.D. (2014). Developing a research agenda: Contributing new knowledge via intent and focus. <i>Journal of Computing in Higher Education</i> , 26, 54–68.
John Hitchcock (PhD, SUNY Albany): Associate Professor and Director of the Center for Evaluation & Education Policy (CEEP) in the School of Education	Evaluating interventions for children with special learning needs, as well as refining methods for performing such evaluations	As the CEEP's Director, I annually supervise approximately \$10 million in external funding, 30–40 evaluation projects and 40 researchers, student assistants, and support staff.	Nastasi, B.K., & Hitchcock, J.H. (2016). <i>Mixed methods research and culture-specific interventions: Program design and evaluation. (The New Mixed Methods Research Series)</i> . Thousand Oaks, CA: Sage. David, S., Hitchcock, J.H., Brooks, G.P., Ragan, B., & Starkey, C. (2016). Mixed methods and Rasch modeling: Developing a measure of trust. <i>Journal of Mixed Methods Research</i> . doi: 10.1177/1558689815624586
Kyungbin Kwon (PhD, University of Missouri): Assistant Professor	Collaborative learning through group awareness tools, computational thinking in K-12 education	The Computer-Supported Collaborative Learning (CSCL) research group has investigated interactions of peers and instructional interventions for collaborative learning in online learning environments. Research topics include but are not limited to online group projects, peer tutoring, group awareness, social loafing, and online discussion. This group has conducted qualitative and quantitative studies to reveal students' peer interactions and find their impact on learning outcomes and satisfaction. I have designed and developed group awareness tools to facilitate an effective group process and to enhance positive group climate. Students have reviewed articles related to research topics and have collaboratively conducted research projects.	Kwon, K., Saporova, D., & Hoffman, K. (2015). Online lecture capturing system: Expected and actual effects of implementation in a problem-based learning medical curriculum. <i>Medical Teacher</i> , 37(6), 578–584. Kwon, K., Liu, Y., & Johnson, L. (2014). Group regulation and social-emotional interactions observed in computer supported collaborative learning: Comparison between good vs. poor collaborators. <i>Computers &amp; Education</i> , 78, 185–200.
Anne Ottenbreit-Leftwich (PhD, Purdue University): Associate Professor	Pre-service and in-service teacher education, technology integration teacher education, service learning, learning communities, and open educational resources as they apply to P-16 education	This group focuses on how technology is being used in K-12 environments by students and teachers. This group operates in smaller research teams, working on individual projects. Examples of research studies include: examining the evolution of knowledge, beliefs, and practices of beginning teachers; investigating computational thinking skills of preservice teachers; a survey of pedagogical beliefs and practices of computer science teachers; and description of 1:1 iPad initiatives and documentation of K-12 teachers designing online courses.	Roman, T., & Ottenbreit-Leftwich, A. (2016). Comparison of parent and teacher perceptions of essential website features and elementary teacher website practice: Implications for teacher communication practice. <i>Journal of Digital Learning in Teacher Education</i> , 32(1), 13–25. Gyabak, K., Ottenbreit-Leftwich, A., & Ray, J. (2015). Teachers using designerly thinking in K-12 online course design. <i>Journal of Online Learning Research</i> , 1(3), 253–274.

(Continued)

**TABLE 3** Continued

FACULTY NAME (TERMINAL DEGREE, GRADUATION)	RESEARCH INTEREST	RESEARCH GROUP/PROJECT	PUBLICATION (MOST RECENT)
Gamze Ozogul (PhD, Arizona State University): Assistant Professor	Instructional design and evaluation, engineering education, research methods, and feedback	The purpose of this research group is to systematically design, develop, implement, and evaluate instruction/educational programs in online environments, multimedia learning environments, educational games or face-to-face settings in various fields such as STEM, language learning, organizations, K-12 schools, engineering education, or teacher preparation. Students participate in various phases of research and work on publications. Example investigation areas include but are not limited to instructional design elements of online environments, signaling, feedback, representations, pedagogical agents, cognitive load, problem solving, and program evaluation.	Johnson, A.M., Ozogul, G., & Reisslein, M. (2015). Supporting multimedia learning with visual signalling and animated pedagogical agent: Moderating effects of prior knowledge. <i>Journal of Computer Assisted Learning</i> , 31(2), 97–115. Ozogul G., Johnson, A.M., Atkinson R.K., & Reisslein, M. (2013). Investigating the impact of pedagogical agent gender matching and learner choice on learning outcomes and perceptions. <i>Computers and Education</i> . 67, 36–50.

development, providing opportunities for modeling and mentoring between both faculty and students and between junior and senior students. A student’s participation in more than one research group is encouraged; this is in order to learn about different research topics and foci. IST faculty’s diverse research groups and projects are introduced in Table 3.

- The annual onsite academic conference is a primary feature of the program, providing leadership, professional development, and service opportunities for on-site and campus students in all programs. A student leader cooperates with the Graduates in IST (GIST) student group to plan, organize, and host a conference that includes practical workshops, papers and posters, keynote speakers, receptions, and a job fair.

## RESEARCH AND DEVELOPMENT

The faculty, individually and in collaboration, lead groups of doctoral students in studies that investigate theories of design and of instructional design, technologies to support and enhance learning, and intervention development to improve workplace learning and performance. Application of research to solve instructional, learning, and performance problems in coursework as well as managing learning environments prepares alumni for key roles in diverse organizations including governmental, corporate, educational, and military organizations.

### On the System of Centers

The IUB School of Education’s Associate Dean for Research provides centralized support for faculty scholarship, primarily through the oversight of five primary and

several auxiliary research centers. Faculty from all programs locate their research projects within one of these centers, receiving support in budget development and grant writing, managing financial and personnel paperwork, and communicating with funding agencies.

### Faculty

IST currently has nine core faculty, one affiliated, and nine faculty emeriti.

1. **Core faculty:** Faculty in IST are internationally recognized for their expertise in the areas of design pedagogy, complex problem-solving strategies, on-line teaching and learning, informal learning, K-12 technology integration, collaborative learning, and multimedia development, as well as human resource development (HRD). IST faculty’s research has been instrumental in defining the field. As educators, they have helped hundreds of instructors improve learning for students of all ages and across all segments of society. As mentors, they have prepared graduates who teach and lead in higher-education institutions around the world (see Table 3).
2. **Affiliated faculty:** Dr. Martin Siegel is a professor and the director of graduate studies in the School of Informatics and Computing. His research focuses on design pedagogy and slow change interaction design. He is presently writing a book called *The Design Habit*.
3. **Faculty emeriti:** We introduce several faculty emeriti who are still active in research and practice.

- **Dr. Bob Appelman** manages three research projects through his consulting company appelDesign. He has developed games for voting decisions for the Center on Congress and for middle-school students' understanding of quantum physics with an NSF grant, and has conducted task analysis of businesses in southern Indiana.
- **Dr. Ivor Davies's** current work is mainly in the area of process consulting with large global companies in the United States and Europe. It involves working with small and large teams as well as with individuals who are preparing for the fast track or who are already on the fast track. Soft skills loom large as a problem area, as do engagement, motivation, and the development of a personal business plan. Efficiency and effectiveness is an underlying theme of much of his work, particularly as they relate to speed, simplicity, and self-confidence within the context of the entities' culture(s).
- **Dr. Michael Molenda** has recently written encyclopedia articles on topics in educational technology and is collaborating on a forthcoming journal article advocating a new definition of performance technology. His selected publications include a proposal pending at Routledge for a book entitled *Elements of Instruction*, which is intended to establish foundational concepts and terms for instructional practice, and a special issue on the mythical retention chart and the corruption of Dale's Cone of Experience (*Educational Technology*, Nov.–Dec. 2014) co-edited with Deepak Subramony.
- **Dr. Charles Reigeluth** has published Volume IV of the Green Book, with co-editors (IST alums) Brian Beatty and Rod Myers, followed by a lecture tour in Japan and China. He has also submitted a \$3 million proposal to IU's Emerging Areas of Research program to engage state leaders in Indiana and one other state in a systemic policy change process to build state capacity for paradigm change in school districts.

## STUDENTS AND ALUMNI

Students and alumni in IST, representing diversity and excellence in diverse organizations, are essential to the quality of our programs and innovation in our programs.

### Students

Residential degree programs include students from 21 countries in addition to the United States, including Bangladesh, Bhutan, Bosnia, Canada, China, Egypt, Hon-

TABLE 4 STUDENT DEMOGRAPHICS (FALL 2016)	
PROGRAM	NUMBER OF STUDENTS ENROLLED
PhD	44
Ed.D. (online)	57
Master's (residential)	6
Master's (online)	22
Certificate (online)	17
<b>Residency Status</b>	
Domestic	97
International from 21 Countries	49
<b>Race/Ethnicity</b>	
American Indian/Alaska Native	1
Asian	5
Black	10
Hispanic/Latino	2
Native Hawaiian or other Pacific Islander	0
White	83
Other International	41 (non-resident alien)
Unknown	4

duras, India, Indonesia, Israel, Japan, Kenya, Saudi Arabia, South Korea, Taiwan, Thailand, Trinidad and Tobago, Tunisia, Turkey, Uzbekistan, and the West Bank. In contrast, most students in online degree programs are U.S. students working in professional fields including schools, corporate training, higher education institutions, and the military (see Table 4).

After IST began offering an online master's program (since 2000) and an Ed.D. program (since 2011), the number of online students has steadily increased. Particularly, the number of graduates of the online master's degree program has surpassed that of the residential master's program since 2013 as shown in Table 5. A number of our certificate students have progressed to the master's

**TABLE 5** GRADUATES BY PROGRAM LEVEL

ACADEMIC YEAR	PHD	ED.D. (ONLINE)	MASTER'S (RESIDENTIAL)	MASTER'S (ONLINE)	CERTIFICATE
2011–2012	8	0	16	4	6
2012–2013	7	0	20	39	5
2013–2014	5	0	10	36	5
2014–2015	6	1	8	23	2
2015–2016	11	1	10	21	6

degree, and several of those are now studying in the Ed.D. program.

## Alumni

IST alumni work in academia and in the field, making a difference in the local community and the world. A few of these scholars and practitioners are named in the following list (in alphabetical order):

### Scholars

- **Dr. Alison Carr-Chellman** is the new dean of the College of Education at the University of Idaho. She has spent her academic career focused on school change and innovation. Her recent work has looked at how to re-engage disengaged learners through use of technology, such as video gaming. Under her leadership as head, the Department of Learning and Performance Systems has more than doubled its online operations and has increased faculty diversity.
- **Dr. Ronald Jacobs** is a professor of education at the University of Illinois at Urbana-Champaign and a director of the Office of International Programs. He has focused his work on the social context of learning, specifically the social relationship between the trainer and the trainee, which led to his major work, structured on-the-job training; this has brought about a transformation in thinking about how best to carry out workplace learning. He served as the past president of the Academy of Human Resource Development, a premier professional organization in HRD, and as an editor of *Human Resource Development Quarterly*, a flagship academic journal in the field.
- **Dr. Insung Jung** is a professor of education at International Christian University in Tokyo, Japan. She is conducting research on the quality of open educational resources, design of future liberal arts education systems, and ICT integration. She has served as a con-

sultant in distance education in numerous national and international institutions and is currently serving as an advisor to the International Board of Standards for Training, Performance and Instruction (IBSTPI) and as an editorial board member for journals including *Distance Education*, *Asian Journal of Distance Education*, *Journal of Online Learning and Teaching*, and *Journal of Distance Learning*.

### Practitioners

- **Dr. Rob Foshay** is a senior partner of The Foshay Group. He has more than 25 years of leadership experience applying instructional design research to plan truly cost-effective strategies and product architectures for e-learning, simulation/games, and assessment. He has served on the Board of Directors of the International Society for Performance Improvement (ISPI) and IBSTPI, as well as an ANSI/ASQ committee, which developed standards for training and education under the ISO 9000 system. He was awarded by ISPI with Honorary Life Membership and a Distinguished Service Award and is a Certified Performance Technologist.
- **Mr. Coley O'Brien** is a vice president of Human Resources and Field Capability for the Wendy's Corporation. In this role, Coley leads human resources for all company-operated North American restaurants. He also oversees field operations training, supporting learning systems and custom-designed solutions for approximately 250,000 crew members, managers, and multi-unit operators in over 6,500 company and franchise restaurants.
- **Dr. Sivasailam Thiagarajan (Thiagi)** is the founder of The Thiagi Group, helping people achieve more through performance-based trainings in playful ways. He served as an editor of *Performance + Instruction*. He was elected the president of the ISPI in 1979 and 2006.



- **Mr. James Wang** is the founder of Wang Film Productions, which has done animation/ink and paint for various TV shows and films for studios in North America, Europe, and Asia. He has collaborated with world-class movie companies such as Disney, Warner Bros., Universal, and Toon City.

## DIRECTIONS AND PLANS

What does the future of IST look like? Recent initiatives demonstrate our commitment to maintain a quality and forward-thinking program.

- **Studio masters program (onsite):** As with many practice-oriented master's programs in the field, we have seen that it is becoming increasingly difficult for anyone already in the workplace to relocate and spend two years in full-time study to earn a master's-level credential. Our current master's program features the internship and portfolio requirements, both of which are attractive to those who have not yet spent time in the workplace and need these forms of preparation for practice. Within a year, we will launch a revised version of this program to enhance its utility for this population of students. Our current core courses will be retained as an effective baseline preparation, and students will take them in parallel with a series of studio experiences that build across three semesters, culminating in a capstone project based in a real-world context. This program is also an expression of our emphasis on preparation of instructional design practitioners as disciplined actors using a full complement of tools rather than as interchangeable selectors of strategies or intervention sets.
- **Online doctorate (Ed.D.):** IST has offered the online Ed.D. degree since 2011. This was the first IU doctorate degree offered completely online. It provides opportunities for working professionals in diverse settings, including corporate, business and industry, government, military, nonprofits, and schools and universities to apply theory to practice at the doctoral level. The Ed.D. program, which produced its first graduate in Spring

2015, is in high demand. We expect to refine this program over time to meet that demand while maintaining rigorous preparation for and oversight of dissertation research.

- **Increased collaboration with the Adult Education program:** Established in 1946 and housed within the IST department since July 2012, the Adult Education program at IUB is one of the nation's oldest adult education programs with an emphasis on purposeful, active learning and program planning in diverse contexts. It was entirely converted to the online format in 1998, and it established an online doctoral minor in 2013. Our two programs share dissertation advising and elective courses across the faculties now. We anticipate cross-disciplinary course offerings, teaching appointments, and research group memberships going forward, strengthening the performance improvement dimension of IST and the international perspective of adult education.

## For More Information

For more information, contact Dr. Thomas Brush, IST Department Chair, at [tbrush@indiana.edu](mailto:tbrush@indiana.edu). 🌟

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- Indiana University. (2015). *Indiana University fact book*. Retrieved from <https://uirr.iu.edu/fact-book/index.html>

Yonjoo Cho is Associate Professor of Instructional Systems Technology (IST) focusing on human resource development (HRD) at Indiana University. She has worked as an HRD practitioner for 13 years in Korea, in business, non-profit, and academic sectors. Her research interests include action learning, HRD, and women in leadership. She has published a book entitled *Trends and Issues in Action Learning Practice: Lessons from South Korea* (Cho & Bong, 2013) with Routledge. She is a board member of the Academy of Human Resource Development and serves on the editorial board of *Human Resource Development Quarterly*, *Human Resource Development Review*, and *European Journal of Training and Development*. She is lead editor of book series on *Current Perspective of Asian Women in Leadership* with Palgrave Macmillan. She received a PhD in instructional technology from the University of Texas at Austin.

Elizabeth Boling is Professor of IST and Associate Dean for Graduate Studies in the School of Education at Indiana University. Prior experience includes 10 years in design practice and five with Apple Computer, Inc. Her research interests include visual design for information and instruction, and design theory, pedagogy and practice. She is past editor-in-chief of *TechTrends*, founding editor and current editor-in-chief of *International Journal of Designs for Learning*, lead editor of the forthcoming Routledge title *Studio Teaching in Higher Education: Selected Design Cases*, and a co-editor of the *Handbook of Research in Educational Communications and Technology*, 5<sup>th</sup> Edition.

Kyungbin Kwon is Assistant Professor of IST at Indiana University. He received a BS and an MA in Education from Seoul National University, and a PhD in Information Science and Learning Technologies from the University of Missouri. His research interests include computer-supported collaborative learning, computational thinking, and online teaching. He has published peer-reviewed articles in *Computers & Education*, *Medical Teacher*, and *Computers in Human Behavior*.

# LESSONS FROM MAGIC FOR THE FIELD OF PERFORMANCE IMPROVEMENT?

Ria Roy

How do you introduce creativity into an organization that is built to be industrial, resilient, and prone to consistency and volume—one that is keen on preserving the spirit of its traditions and has barely changed since its debut in 1964 at the New York World's Fair? (Kuang, 2015).

## Solution

With years in development, a team of 1,000, and a billion-dollar investment, Disney's MyMagic+ is a combination of a website, a mobile application, and a wristband that allows visitors to customize their experience at Disney World (CapGemini Consulting, 2014; Carr, 2015; Wilson, 2013). Introduced in 2013, MagicBands, a part of the inventive system, are equipped with radio frequency identification (RFID) chips that interact with scanners throughout the park. MagicBands function as room key, park ticket, and credit card.

## Leveraging Innovation plus Operational Efficiency plus Analytics plus Customer Experience to Elevate the Disney World Experience?

A project of this magnitude invariably has many linkages to HPT and many lessons an organization can learn and leverage for its next innovation. The following are five key principles that stood out to me:

1. **Focusing on the right metric.** Disney recognized that one of its key metrics—guests' *intent to return*—was dropping. This metric reflected a key performance gap. To close this gap, Disney wanted a solution that engaged the technology-oriented generation to enjoy Disney World as much as their parents' generation did.
2. **Understanding your customers' pain points.** The MagicBand is linked to a customer's credit card. It eliminates the need to carry cash, eliminates the need to wait in long lines, eliminates the occurrence of

misplaced and lost luggage (since each piece is tagged at the home airport), and follows the customer access to the hotel, the room, and so on. With one tool, MagicBand replaces several other human performance tools for greater convenience.

3. **Striking the balance between creativity and operations.** The organization had to overcome several pain points to enable its customers to get into the Disney World Experience faster. This involved taking into account the realities of its daily operations such as catching people who were trying to scam the ride reservation system (consequences), ensuring that parents were reunited with their lost kids (motives), and so on.
4. **Redefining customer service.** The sensors in the MagicBand enable the scanners in restaurant ceilings to help triangulate the customer's location, thus allowing the server to locate customers faster. This is an interesting application of geographic information systems (GIS), which is an emerging tool for human performance (Carl, 2016).
5. **Making its customers happier by reducing the number of options at Disney World and thus eliminating the anxiety that comes with making a choice from a vast list of things to do.** This ties into HPT's role in reducing task complexity (Wood, 1986).

## Lessons for the Practice and Field of Performance Improvement

- For the practice and the field to sustain and garner more acceptance, are we as a society of performance improvement professionals looking at the right

metrics? Are the metrics for the practice different from those in the field? If so, what are they?

- How are we redefining our customer experience? What blueprints do academics and practitioners bring to the table? What customer pain-points have we considered as we redefine our stakeholder experience? (Honebein & Cammarano, 2005).
- How do we marry innovation and operational efficiency so that the practice and the field may make better inroads?
- How are we optimizing the paradox of choice? What is its role, if any, in the field and practice of performance improvement? 🌅

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