LECTURE NOTES

ON

HUMAN RESOURCE DEVELOPMENT

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Concept origin and needs of HRD

Human resources development is a continuing process comprising three interdependent components: Investment in human resources to enhance productive capabilities.

2. Utilisation of those human resources to produce increased output.

3. Participation of the human beings who have improved resources (better education, better skills levels etc.) in the consumption of that increased output through a better quality of life. (See fig 1.1)

Fig 1.1

Sustainable human resources development must involve all three components, as seen in the diagram above. At a national level, investment in human resources must be turned into effective utilisation of those human resources if national output is to be increased on a sustainable basis.
At an individual level, investment in human resources improves earning capabilities. Therefore individuals and families have more money to do many things including pay for their own further skills development. There is a very strong link between investing in human resources development and improvements in the quality of life. Improvements in nutrition, health and education are key elements of an improved quality of life and must be considered important investments in human resources, particularly in developing countries. Human beings cannot be developed if they do not have enough food, are in poor health or cannot read or write. For developing countries, it is extremely important that all members of the society have access to human resource development activities, especially the poor, women and populations in rural areas.

Participation and choice are key elements in this view of human resource development. The financial reward obtained from participation in production activity is the main way that individuals are able to participate in the quality-of-life benefits that are created by development. Increased job satisfaction and a sense of personal worth arising from increased productivity are also very important contributions to quality of life. The enhanced capabilities created by development enlarge the choices made available to both individuals and nations.

**What is the nature of human resources development.**

Nature of human resource development

1. Inherent part of Management: Human Resource Management is inherent part of management because if the manager wants to draw best out of his people, he must do the basic responsibility of selecting people who will work under him along with he must train, motivate appraise them from time to time.

2. Pervasive function: It is a pervasive function which means that every person in the organization from top to lower level is required to perform this function at continuous basis.
3. People centered: It is concerned with all kind of personnel from top to bottom of the organization.

4. Personnel Function: It involves various functions concerned with managing people from man power planning recruitment, selection, placement, training, appraisal to compensation of employees.

5. Continuous Process: It is not a one step function rather it is a continuous process.

The main HRD sub systems are:

1 Performance Appraisal

4. Potential Appraisal

5. Training and employee Development

6. Career development and career Planning

7. Rewards

8. Organiasation Development

9. Role Analysis and Role Development

10. Quality Work Life

9. counseling and Mentoring

10. Human Resources information system

**human resources management differ from himan resources development**

Human resource management (HRM):

It is the strategic and coherent approach to the management of an organization's most valued assets - the people working there who individually and collectively contribute
to the achievement of the objectives of the business. The terms "human resource management" and "human resources" (HR) have largely replaced the term "personnel management" as a description of the processes involved in managing people in organizations. Human Resource management is evolving rapidly. Human resource management is both an academic theory and a business practice that addresses the theoretical and practical techniques of managing a workforce.

**Human resource development (HRD):**

In terms of recruitment and selection it is important to consider carrying out a thorough job analysis to determine the level of skills/technical abilities, competencies, flexibility of the employee required etc. At this point it is important to consider both the internal and external factors that can have an effect on the recruitment of employees. The external factors are those out-with the powers of the organization and include issues such as current and future trends of the labor market e.g. skills, education level, government investment into industries etc. On the other hand internal influences are easier to control, predict and monitor, for example management styles or even the organizational culture.

HRD Matrix; HRD matrix shows the interrelationships between HRD instruments, processes, outcomes and organizational effectiveness.

**HRD Instruments:**

These include performance appraisal, counseling, role analysis, potential development, training, communication policies, job rotations, rewards, job enrichment programmes, etc. These instruments may vary depending on the size of the organization, the internal environment, the support and commitment of the top management, the Competitive policies etc.

**HRD Processes:**

The HRD instruments lead to the generation of HRD processes like role clarity, performance planning, development climate, risk taking, dynamism in employees. Such HRD processes should result in more competent, satisfied and committed people that would make the organization grow by contributing their best to it.

**HRD Outcomes:**

HRD instruments and processes make people more committed and satisfied, where they tend to give their best to the organization enthusiastically

**Organizational Effectiveness:**

The HRD outcomes influence the organizational effectiveness, which in turn, depends on a number of variables like environment, technology, competitors, etc.
HRD INTERVENTIONS A system has its own objectives, components or elements and a process. It has inputs an output and throughput. The objective if HRD system is to build a lasting culture so that employees learn and give of their best on a continuous basis. Culture can be divided in terms of values and norms. The instruments available for an organization are put into subsystems and become HRO systems or subsystems. The following instruments available in the past, have been put into subsystems.

1. induction training
2. Training
3. Performance planning
4. Performance analysis & review
5. performance counseling
6. Performance development
7. Performance appraisals
8. Rewards & recognition
9. Potential appraisal and development
10. carrier paths and other team based activities
11. communications
12. quality circles and other team based activities
13. Job rotation
14. Organisational diagnosis development
15. Team building, role clarity and other mechanisms

These are most frequently used instruments that can be converted into instruments/subsystems, which are propagated to ensure maximum achievement of HRD goals. As we convert the instruments into systems/subsystems some of them get grouped either for administrative continence or to ensure synergy in terms of value. For example, induction training and training get grouped to form the training system. The training system attempts to ensure that instrument of training is used effectively, cost effectively appropriately and not misused. It becomes a system by formulating its own objectives, elements, inputs, outputs and process. IT is the inputs and the output of the systems that link to the other subsystems. The following subsystems have been extensively used in last 25 years of HRD in India HRD interventions/ HRD mechanisms /Methods

The following subsystems have been used extensively used in the last 25 years of HRD in India Training
Performance appraisal
Potential appraisal
Counseling
Coaching
Mentoring
Career planning and development
Organizational development

1. Training

Training may be considered as a short educational process and process of learning sequence of programmed behavior. It is an application of knowledge.

- It gives people an awareness of some of the rules and procedures to guide their behaviors.
- It is the act of increasing the knowledge and skill of employee for a particular job.

Thus, training bridges the difference between job requirements and employees’ present specifications.

Performance appraisal

- Performance appraisal is an evaluation of the performance of an employee against the job standards in terms of quantitative, qualitative and behavioural aspects at the workplace.
- A successful PA process involves explaining the job, communicating expectations, observing and documenting behaviour and providing frequent informal feedback.
- “It is the systematic evaluation of the individual with respect to his or her performance on the job and his or her potential for development”.

Objectives of performance appraisal

To effect promotions based on competence and performance
To assess the training and development needs of an employees
To let employees know where they stand insofar as their performance is concerned
To determine whether Hr programmers have been effective or not

Main components of performance management system

Identification of KRAs
Setting of goals or objectives (under each KPA) every year for the next year
Periodic review of performance
Identification of behavioral dimensions that are critical for managerial effectiveness

Potential appraisal

The potential appraisal refers to the appraisal i.e. identification of the hidden talents and skills of a person. The person might or might not be aware of them.

- Potential appraisal is a future oriented appraisal whose main objective is to identify and evaluate the potential of the employees to assume higher positions and responsibilities in the organizational hierarchy.

4. Counseling
5. Coaching
6. Mentoring
7. Career planning and development

Role and competency:

A set of task related behaviours required of a person by his or her position in the organization.

Competency

A competency is an area of knowledge, ability, skill and other characteristics which an individual must possess in order to produce the outputs for his/her roles.

HRD Managers’ Roles:

ASTD Model:

Evaluator
Group facilitator
Individual development counselor
Instructional writer
Instructor
Manager of training and development
Marketer
Media specialist
Needs analyst
Programme administrator
Strategist
Task analyst
Theoretician
Transfer agent.

Nadler Model:
  Supervisor of programmes
  Facilitator of learning
  Instructional strategist
  Administrator and manager
  Designer of programmes
  Arranger of facilities.

Core Competencies of HRD Manager:
  • Operational management competency
  • Strategic management competency
  • Programme planning and development competency
  • Programme evaluation competency
  • Capacity development need assessment competency
  • Learning programme design and evaluation competency

Marketing competency.
  • Learning/group facilitation competency
  • Change agent/OD practitioner competency
  • Consulting competency
• People management/relationship competency

HRD professional and functional competency.

What are the challenges faced by HRD professionals.

The common challenges faced by HRD professionals are:-

(a) Culture or attitude:

Different countries have different culture and as the world has become a global village HRD Professionals have to face the cultural challenges in different countries or with the employees belonging to the different countries.

(b) Technology or skills:

The pace of technological development is very high and the new technologies are replacing the older ones quickly. Same is the case with techniques and technologies use for training. An HR professional has to upgrade his skills and knowledge to meet the requirements of the new generation.

(c) Values of behaviour:

The HRD professionals have to adjust themselves to the emerging new values as principle centric leadership is becoming trend in the corporate world. Values like trust credibility timeliness and the simpler rules are becoming the corners stone of many businesses.

(d) Knowledge or information:

Enhancement of knowledge is also a big challenge for HRD professional as they have to understand the different philosophies demonstrated at different places in the world. For example the philosophy related to leadership changes dramatically in organizations from different parts of the world.

(e) Life style or habits:

The life style of an employee is also important for HRD professionals because they have to understand the habits of the employees and then decide the training that needs to be imparted for bringing a change in the habits of the employees.

(f) Knowledge of new practices:

An HRD professional has to be aware of the new practices adopted by the organization around globe. An HRD professional should know about the practices like dignity of individual, retention of employees, leadership by examples, clear conscience relationship with employees share holder, vendors, suppliers, customers and society at large.

(g) Environment:

An open environment is required for the success of an organization. The organizational environment should have meritocracy, fearless, justice, speed imagination and accountability. It is the job of the HRD professional to inspire the employee to perform better ones this environment is created in the organization.
HRD Matrix identifies the interrelationships between HRD instruments, processes, outcomes and organisational effectiveness. HRD instruments include performance appraisal, counselling, role analysis, potential development, training, reward system, job enrichment, etc. These mechanisms may vary depending upon the size of the organisation, the commitment of the top management, the environment, the culture and climate, the perception of the people, technology used, methods employed by the competitors, etc. It is in the interest of the organisation that the top management should give due weightage to these factors to keep the workforce motivated all the time providing challenging jobs and designing career planning and suitable compensation packages so that trained employees may not leave the organisation.

These instruments lead to generation of HRD processes like role clarity, development planning, development climate, risk-taking and dynamism in employees. Such HRD processes should result in more competent, satisfied and dynamic people is likely to do better than which does not believe in HRD concept and committed people who, by their contributions, would make the organisation grow. Such HRD outcomes influence organisational effectiveness in the long-run. It may be noted that organisational effectiveness also depends on a number of other variable like environment, technology, competitors, etc. However, other things being the same, an organisation that has competence.
HRD Interventions

Human resource development (HRD) is the systematic and planned practice designed by an organization to enhance employee knowledge, skills, abilities, and attitudes. It begins when an employee is hired and continues throughout the employee's tenure with the organization. The activities, designed for employees at all levels of the career ladder, help direct current and future job demands so that efficient and effective use of valuable resources are maintained. It is centralized or decentralized depending upon the structure and functions of the organization.¹

Human resource management (HRM) is the business area that strategically plans and executes human resource functions. It is the utilization of employees joined together.

UNIT- 2

Figuring out what is really needed Not always an easy task
Needs lots of input
Takes a lot of work

“Do it now or do lots more later” First step in HRD process.

Types of needs: Factors that can prevent problems from occurring

Analytic: Identify new or better ways to do things

Compliance: Mandated by law or regulation
Evaluating effectiveness:

- The degree to which a training (or other HRD program) achieves its intended purpose
- Measures are relative to some starting point
- Measures how well the desired goal is achieved

Human Resource (HR) Audit: Meaning, Features, Objectives and Approaches

Meaning:

HR audit is an important management control device. It is a tool to judge organisations performance and effectiveness of HR management. According to Dale Yoder, “Personnel audit refers to an examination and evaluation of policies, procedures and practices to determine the effectiveness of personnel management.”

It is an analytical, investigative and comparative process. It gives feedback about HR functions to operating managers and HR specialists. It enables to know about the effectiveness of personnel programmes. It further provides feedback about how well managers are meeting their
HR duties. It provides quality control check on HR activities. It refers to determine the effectiveness and efficiency of HRM.

Features:

(1) The measurement and effectiveness HR management’s mission, goals, strategies, policies, programmes and activities, and

(2) To determine the action plan for future in response to the results from such measurement.

According to R.D. Gray, “the primary purpose of audit is to know how the various units are functioning and how they have been able to meet the policies and guidelines which were agreed upon; and to assist the rest of the organization by identifying the gap between objectives and results for the end product of an evaluation should be to formulate plans for corrections or adjustments.”

Objectives:

(1) To review every aspect of management of HR to determine the effectiveness of each programmes in an organisation.

(2) To seek explanation and information in respect of failure and success of HR.

(3) To evaluate implementation of policies.

(4) To evaluate the performance of personnel staff and employees.

(5) To seek priorities, values and goals of management philosophy.

Need for Human Resource Audit:

Though there is no legal obligation to have HR audit as in case of financial accounts but the managements have realized its need and usefulness. Therefore they have taken up HR audit voluntarily.

It is done to fulfill the following needs:

(1) The managements of organisations have realized the need for HR audit because of powerful influence on motivation of employees at work due to participation of employees in decision making.

Each year companies focus time and resources internally to deliver performance reviews, set goals and finalize development plans. For most this is an annual exercise, but the best keep the conversation going throughout the year and emphasize the importance of development by providing real opportunities to grow their teams.
Unit-3

Employee development activities:

By focusing on effective development activities, managers and leaders can tap into their employees' talents and strengths. While this sounds easy, think about this quote from Marcus Buckingham: "Most people do not use their talent, at work, at all." Pause and think about that statement for 10 seconds.

Many companies provide access to e-learning on topics including project management, software training and technical skills. Some will also provide reimbursement for their employees to attend professional conferences or certifications externally. While these are important and can be effective in some aspects of development, I often remind leaders that on-the-job development accounts for up to 75% of effective learning.

Whether you are in any type of leadership role and have responsibility for a team or are looking to take charge of your career growth, here are 7 approaches to development that will deliver the best growth and impact:

**Stretch assignments and projects.** Think about what special assignments might exist in the coming months and who on your team would benefit from serving on a cross-functional team while developing additional skills.

**Job Enrichment.** These opportunities typically exist internally that will benefit an employee's current role, while creating additional ways to develop. Examples could include presentations at team meetings, joining a diversity committee or volunteering.

**Mentoring or Coaching.** Whether or not your company has a formal mentoring program, start small. Mentoring and coaching provides demonstrated benefits around quality of work, problem solving and communication skills.

**Job Shadowing.** Job shadowing can be a great way for your employees to learn critical elements of other jobs, while further developing in their own. It is also a great way for employees to more formally explore potential career opportunities internally, yet outside of their current job.

**Job Rotation.** Providing an opportunity for your team to move and rotate through one or more positions is another great strategy in employee development. Rotations can last for days, months, or even a year or two.
**Lateral move.** Typically with a lateral move an employee takes on a different position with the same salary grade and similar level of responsibilities. In addition to retaining employees longer, the real benefit of a lateral move provides new challenges and skill development.

**Promotions.** When executed with the right plan, promoting your employees into a new position is another way to reward great performance, develop skills and increase motivations.

In 2014, the 100 Best Companies to Work For by Great Place to Work put employee development as a top priority, more than any other area. I expect this will remain a top priority and a key focus for many organizations over the coming years as we continue to see the landscape for recruiting great talent become even more competitive.

Not providing growth and developmental opportunities to direct reports and teams can have a lot of consequences. Probably the most damaging is that they decide to find development elsewhere and leave for another opportunity externally.

Leadership development expands the capacity of individuals to perform in leadership roles within organizations. Leadership roles are those that facilitate execution of a company’s strategy through building alignment, winning mindshare and growing the capabilities of others. Leadership roles may be formal, with the corresponding authority to make decisions and take responsibility, or they may be informal roles with little official authority (e.g., a member of a team who influences team engagement, purpose and direction; a lateral peer who must listen and negotiate through influence).

Leadership development is thought to be key to business success. A study by the Center for Creative Leadership holds that 65 percent of companies with mature leadership development programs drove improved business results as compared to 6 percent of companies without such a program. Similarly, 86% of companies with leadership development programs responded rapidly to changing market conditions whereas only 52% of companies with immature programs were able to do so.

**Developing individual leaders**

Traditionally, leadership development has focused on developing the leadership abilities and attitudes of individuals.

Different personal trait and characteristics can help or hinder a person's leadership effectiveness and require formalized programs for developing leadership competencies.

Classroom-style training and associated reading for leadership development may ail from the possible divergence between knowing what to do and doing what one knows; management expert Henry Mintzberg is one person to highlight this dilemma. It is estimated that as little as 15% of learning from traditional classroom-style training results in sustained behavioral change within workplaces.
The success of leadership development efforts has been linked to three variables:

**Individual learner characteristics**

**Quality and nature of the leadership development program**

**Support for behavioral change from the leader's supervisor.**

Military officer-training academies, such as the Royal Military Academy Sandhurst, go to great lengths to accept only candidates who show the highest potential to lead well. Personal characteristics that are associated with successful leadership development include leader motivation to learn, a high achievement drive and personality traits such as openness to experience, an internal focus of control, and self-monitoring. In order to develop individual leaders, supervisors or superiors must conduct an individual assessment.

Development is also more likely to occur when the design of the development program:

Integrates a range of developmental experiences over a set period of time (e.g., 6–12 months). These experiences may include 360 degree feedback, experiential classroom style programs, business school style coursework, executive coaching, reflective journaling, mentoring and more.

Involves goal-setting, following an assessment of key developmental needs and then an evaluation of the achievement of goals after a given time period.

Among key concepts in leadership development one may find:

**Experiential learning:** Positioning the individual in the focus of the learning process, going through the four stages of experiential learning as formulated by David A. Kolb:

Concrete experience.

Observation and reflection.

Forming abstract concepts.

Testing in new situations.

Self efficacy: The right training and coaching should bring about 'self efficacy' in the trainee, as Albert Bandura formulated: a person's belief about his capabilities to produce effects.

Visioning: Developing the ability to formulate a clear image of the aspired future of an organization unit.

Attitude: Attitude plays a major role in being a leader.

**Developing leadership at a collective level**
Leadership can also be developed by strengthening the connection between, and alignment of, the efforts of individual leaders and the systems through which they influence organizational operations. This has led to a differentiation between leader development and leadership development.

Leadership development can build on the development of individuals (including followers) to become leaders. In addition, it also needs to focus on the interpersonal linkages in the team.

Following the credo of people as an organization's most valuable resource, some organizations address the development of these resources (including leadership).

In contrast, the concept of "employee ship" recognizes that what it takes to be a good leader is not too dissimilar to what it takes to be a good employee. Therefore, bringing the notional leader together with the team to explore these similarities (rather than focusing on the differences) brings positive results. This approach has been particularly successful in Sweden where the power distance between manager and team is small.

**Succession planning**

The development of "high potentials" to take over leadership when the time comes the current leadership to leave their positions is known as succession planning. This type of leadership development usually requires the extensive transfer of an individual between departments. In many multinationals, it usually requires international transfer and experience to build a future leader.

Succession planning requires a sharp focus on the organization's future and vision, in order to align leadership development with the future that the organization aspires to create. Thus successive leadership development is based not only on knowledge and history but also on a dream. For such a plan to be successful, a screening of future leadership should be based not only on "what we know and have" but also on "what we aspire to become".

Persons involved in succession planning should include current leadership members who can articulate the future vision. Three critical dimensions should be considered:

**Skills and knowledge;**

Role perception and degree of acceptance of leading role; and self efficacy.

Action learning is an approach to solving real-life problems that involves taking action and reflecting upon the results. This helps improve the problem-solving process as well as simplify the solutions developed by the team.

**The action learning process includes:**

a real problem that is important, critical, and usually complex,
a diverse problem-solving team or "set",
a process that promotes curiosity, inquiry, and reflection,
a requirement that talk be converted into action and, ultimately, a solution, and
a commitment to learning.

In many, but not all, forms of action learning, a coach is included who is responsible for promoting and facilitating learning as well as encouraging the team to be self-managing. In addition, the learning acquired by working on complex, critical, and urgent problems that have no currently acceptable solutions can be applied by individual, teams, and organizations to other situations. The theory of action learning and the epistemological position were developed originally by Reg Revans (1982), who applied the method to support organisational and business development, problem solving and improvement.

Because action learning has been demonstrated to be very effective in developing a number of individual leadership and team problem-solving skills (Leonard and Marquardt, 2010), it has been used extensively as a component in corporate and organizational leadership development programs. Because complex problems require many skills, individual team members can develop a customized learning agenda for themselves. This strategy is quite different from the "one size fits all" curriculum that is characteristic of many training and development programs.

**Revans' formula**

Reginald Revans is the originator of action learning. Revans' formative influences included his experience training as a physicist at the University of Cambridge. In his encounters with this talented group of scientists – several went on to win Nobel prizes – he noted the importance of each scientist describing their own ignorance, sharing experiences, and communally reflecting to learn. He used these experiences to further develop the method in the 1940s while working for the Coal Board in United Kingdom. Here, he encouraged managers to meet together in small groups, to share their experiences and ask each other questions about what they saw and heard. The approach increased productivity by over 30%. Later in hospitals, he concluded that the conventional instructional methods were largely ineffective.

People had to be aware of their lack of relevant knowledge and be prepared to explore the area of their ignorance with suitable questions and help from other people in similar positions.

Later, Revans made this more precise in the opening chapter of his book (Revans, 1980) which describes the formula:

\[ L = P + Q \]
where $L$ is learning, $P$ is programming and $Q$ is questioning to create insight into what people see, hear or feel.

$Q$ uses:
"closed" questions:
who?
what?
"objective" questions:
how much or how many?
"relative" questions:
where
when
"open questions
why?
how?

Although $Q$ is the cornerstone of the method, the more relaxed formulation has enabled action learning to become widely accepted in many countries all over the world. In Revans' book there are examples from the United States, Canada, Latin America, the Middle East, Africa, and Asia-Pacific.

International Management Centres, the action learning professional association where Revans was inaugural president, have proposed extension to this formula with the addition of $R$ for "reflection". This has also been proposed by Michael Marquardt:

$L = P + Q + R$.

In this expanded equation, $R$ refers to reflection. This additional element emphasizes the point that "great questions" should evoke thoughtful reflections while considering the current problem, the desired goal, designing strategies, developing action or implementation plans, or executing action steps that are components of the implementation plan.

The proven power of the action learning process originates in its theoretical underpinnings (Waddill & Marquardt, 2003). Waddill and Marquardt demonstrate the link between adult learning theory and Marquardt's action learning approach in their article entitled "Adult Learning Orientations and Action Learning".
Use in organizations

Today, action learning is practiced by a wide community of businesses, governments, non-profits, and educational institutions.

Writers on the subject have included Mike Pedler, Alan Mumford and Richard Hale in the United Kingdom & Australia, Yury Boshyk in Canada, Garry Luxmore in Australia. Ng Choon Seng in Singapore, Ira Cohen and Kevin Hao in China, and Michael Marquardt, Skipton Leonard, Arthur Freedman, Robert Kramer, and Joe Raelin, and Dr. Verna Willis (a pioneer in action learning and co-author with Robert L. Dilworth, as well as an award recipient with the Annual Global Forum on Action Learning in the United States.

Action learning is being applied using the Action Learning Question Method (Hale) to support organisational development (OD) capability development across central government in the UK Civil Service supported by OD specialists Mayvin (Hale & Saville, 2014). As such this is combining action learning with organisational development as reported at the 2014 Ashridge Action Learning Conference and Action Learning: Research and Practice, October, 2014.

An action learning approach has been recognized as a valuable means of supporting the Continuing Professional Development of professionals in emerging professions. The Action Learning Question approach has been applied with, for instance the emerging professional field of global outsourcing as reported by Hale ('Actual Professional Development', Training Journal, 2012). This supports the idea that powerful learning can occur at the boundaries of organizations as proposed by Wenger in his work on 'Communities of Practice'.

Organizations may also use action learning in the virtual environment (Waddill, Action E-Learning, Human Resource Development International, 2006). This is a cost effective solution that enables the widespread use of action learning at all levels of an organization. Action e-Learning (AEL) – as defined and implemented by Waddill (2004) – provides a viable alternative for organizations interested in adapting the action learning process for online delivery with groups where the members are not co-located.

ARL, MiL and WIAL models

As with other educational processes, practitioners have built on Revans' pioneering work and have adapted some tenets to accommodate their needs. One such branch of action learning is Action Reflection Learning (ARL), which originated in Sweden among educators and consultants under the guidance of Lennart Rohlin of the MiL Institute in the 1970s. With the so-called “MiL model”, ARL gained momentum with the work of LIM, Leadership in International Management, under the leadership of Ernie Turner in the USA. The WIAL (World Institute for Action Learning) Model was developed by Michael Marquardt, Skipton Leonard, Bea Carson and Arthur Freedman.
The main differences between Revans’ approach to action learning and the ‘MiL Model’ in the ‘80s are: the role of a project team advisor (later called Learning Coach), which Revans had reservations about; the use of team projects rather than individual challenges; the duration of the sessions, which is more flexible in ARL designs.

The MiL Model evolved organically as practitioners responded to diverse needs and restrictions. In an experiential learning mode, MiL practitioners varied the number and duration of the sessions, the type of project selected, the role of the Learning Coach and the style of his/her interventions.

ARL evolved organically through the choices and savvy intuitions of practitioners, who informally exchanged their experiences with each other. It became a somewhat shared practice, which incorporated elements of design and intervention that the practitioners adopted because of their efficacy. In 2004, Isabel Rimanoczy researched and codified the ARL methodology, identifying 16 elements and 10 underlying principles.

The WIAL Model incorporates six elements: (1) problem or challenge, (2) group of 4-8 members, (3) reflective inquiry, (4) development and implementation of strategies and actions, (5) individual, group and organizational learning, and (6) an action learning coach. The model starts with 2 simple ground rules that ensure that statements follow and are related to questions and provide the authority for the coach to promote learning. Team members may develop additional ground rules, norms, and roles as they deem necessary or advantageous. Addressing Revans’ concern that a coach's over-involvement in the problem-solving process will engender dependency, WIAL coaches only ask questions that encourage team members to reflect on the team's behavior (what is working, can be improved, or done differently) in efforts to improve learning and, ultimately, performance.

"Unlearning" as a prerequisite for "learning"


The process of learning more creative ways of thinking, feeling, and being is achieved in action learning by reflecting on what is working now and as well as on actions that can be improved. Action learning is consistent with the principles of positive psychology (Seligman and Csikszentmihalyi, 2000) and appreciative inquiry (Cooperrider and Whitney, 2001) by encouraging team/set members to build on strengths and learn from life's challenges. In action learning, there is no need to unlearn what has worked in the past. Reflecting on what has not worked helps team/set members unlearn what doesn't work and invent better ways of acting going forward.
Unlike other writers in the field of action learning, Kramer applies the theory of art, creativity and "unlearning" of the psychologist Otto Rank to his practice of action learning. Rank was the first to see therapy as a learning and unlearning experience. The therapeutic relationship allows the patient to: (1) learn more creative ways of thinking, feeling and being in the here-and-now; and (2) unlearn self-destructive ways of thinking, feeling and being in the here-and-now. Patterns of self-destruction ("neurosis") represent a failure of creativity, not, as Freud assumed, a retreat from sexuality.

In action learning questions allow group members to "step out of the frame of the prevailing ideology", as Otto Rank wrote in Art and Artist (1932/1989, p. 70), reflect on their assumptions and beliefs, and reframe their choices. The process of "stepping out" of a frame, out of a form of knowing – a prevailing ideology – is analogous to the work of artists as they struggle to give birth to fresh ways of seeing the world, perspectives that allow them to see aspects of the world that no artists, including themselves, have ever seen before.

The most creative artists, such as Rembrandt, Michelangelo and Leonardo, know how to separate even from their own greatest public successes, from earlier artistic incarnations of themselves. Their “greatness consists precisely in this reaching out beyond themselves, beyond the ideology which they have themselves fostered,” according to Art and Artist (Rank, 1932/1989, p. 368). Through the lens of Otto Rank’s work on understanding art and artists, action learning can be seen as the never-completed process of learning how to “step out of the frame” of the ruling mindset, whether one’s own or the culture’s – in other words, of learning how to unlearn.

Comparing the process of unlearning to the “breaking out” process of birth, Otto Rank was the first psychologist to suggest that a continual capacity to separate from “internal mental objects” – from internalized institutions, beliefs and assumptions; from the restrictions of culture, social conformity and received wisdom – is the sine qua non-for lifelong creativity.

Unlearning necessarily involves separation from one’s self-concept, as it has been culturally conditioned to conform to familial, group, occupational or organizational allegiances. According to Rank (1932/1989), unlearning or breaking out of our shell from the inside is “a separation [that] is so hard, not only because it involves persons and ideas that one reveres, but because the victory is always, at bottom, and in some form, won over a part of one’s ego” (p. 375).

In the organizational context, learning how to unlearn is vital because what we assume to be true has merged into our identity. We refer to the identity of an individual as a “mindset.” We refer to the identity of an organizational group as a “culture.” Action learners learn how to question, probe and separate from, both kinds of identity—i.e., their “individual” selves and their “social” selves. By opening themselves to critical inquiry, they begin to learn how to emancipate themselves from what they "know" – they learn how to unlearn.

There is also an emerging, radical approach to unlearning in the areas of critical action learning (CAR). According to Pedler and Hsu (2014), Chokr's (2009) concept of unlearning has an
important implication for critical action learning because it questions the predominant cultural tendency that see learning as an unquestionable good. Peder and Hsu (2014) further connect the idea of unlearning to some ancient forms of wisdom such as Taoism (Hsu, 2013).

**Role of facilitator, coach and questions**

An ongoing challenge of action learning has been to take productive action as well as to take the time necessary to capture the learning that result from reflecting on the results of taking action. Usually, the urgency of the problem or task decreases or eliminates the reflective time necessary for learning. As a consequence, more and more organizations have recognized the critical importance of an action learning coach or facilitator in the process, someone who has the authority and responsibility of creating time and space for the group to learn at the individual, group and organizational level.

There is controversy, however, about the need for an action learning coach. Reg Revans was sceptical about the use of learning coaches and, in general, of interventionist approaches. He believed the action learning set or group could practice action learning on its own. He also had a major concern that too much process facilitation would lead a group to become dependent on a coach or facilitator. Nevertheless, later in his development of the action learning method, Revans experimented with including a role that he described as a "supernumerary" that had many similarities to that of a facilitator or coach (Revans, 2011, p. 9). Revans, like many other action learning practitioners, noted that without someone dedicated to managing basic process norms as well as championing individual, team, and organizational learning, action learning often devolved into lots of action without much learning.

Pedler distills Revans' thinking about the key role of the action learning facilitator as follows:

(i) The initiator or “accoucheur”: "No organisation is likely to embrace action learning unless there is some person within it ready to fight on its behalf. .....This useful intermediary we may call the accoucheur - the managerial midwife who sees that their organisation gives birth to a new idea...". (Revans, 2011, p. 101)

(ii) The set facilitator or “combiner”: “there may be a need when it (the set) is first formed for some supernumerary ... brought into speed the integration of the set ....” but “Such a combiner ....... must contrive that it (the set) achieves independence of them at the earliest possible moment...” (Revans, 2011, p. 9).

(iii) The facilitator of organizational learning or the “learning community” organiser: “The most precious asset of any organization is the one most readily overlooked: its capacity to build upon its lived experience, to learn from its challenges and to turn in a better performance by inviting all and sundry to work out for themselves what that performance ought to be.” (Revans, 2011, p. 120)
Hale (2003a, 2003b, 2004) suggested that the facilitator role developed by Revans (2011) be incorporated into any standards for action learning facilitation accreditation. Hale also suggests the action learning facilitator role includes the functions of mobiliser, learning set adviser, and learning catalyst (Hale, 2012). To increase the reflective, learning aspect of action learning, many groups now adopt the practice or norm of focusing on questions rather than statements while working on the problem and developing strategies and actions. Questions focus discussion and encourage the group to listen, to become a cohesive team more quickly, and to generate creative, out-of-the-box thinking.

Self-managed action learning (Bourner et al., 2002; O'Hara et al., 2004) is a variant of action learning that dispenses with the need for a facilitator of the action learning set. Shurville and Rospigliosi (2009) have explored using virtual action learning to promote self-management by the team. Deborah Waddill (2003) has developed guidelines for virtual action learning teams, what she calls action e-learning.

There are a number of problems, however, with pure self-managed teams (i.e., with no coach). Wellins, Byham, & Wilson (1991) have noted that self-managing teams (such as task forces) seldom take the time to reflect on what they are doing or make efforts to identify key lessons learned from the process. Without reflection, team members are likely to import organizational or sub-unit cultural norms and familiar problem solving practices into the problem-solving process without explicitly testing their validity and utility. Team members employ assumptions, mental models, and beliefs about methods or processes that are seldom openly challenged, much less tested. As a result, teams often apply traditional problem solving methods to non-traditional, urgent, critical, and discontinuous problems. In addition, team members often "leap" from the initial problem statement to some form of brainstorming that they assume will produce a viable solution. These suggested solutions typically provoke objections, doubts, concerns, or reservations from other team members who advocate their own preferred solutions. The conflicts that ensue are generally both unproductive and time-consuming. As a result, self-managed teams, tend to split or fragment rather than develop and evolve into a cohesive, high-performing team.

Because of these typical characteristics of self-managing teams, many theorists and practitioners (c.f., Marquardt, Leonard, Freedman, and Hill, 2009) have argued that real and effective self-management in action learning requires coaches with the authority to intervene whenever they perceive an opportunity to promote learning or improve team performance. Without this team role, there is no assurance that the team will make the time needed for the periodic, systemic, and strategic inquiry and reflection that is necessary for effective individual, team, and organizational learning.

Events, forums and conferences:

A number of organizations sponsor events focusing on the implementation and improvement of action learning. These include The Journal of Action Learning: Research & Practice, the World

**Assessment Center**

An assessment center is basically a series of assessments carried out using several techniques like simulation, psychometric test and exercises to take critical decisions like selective or rejecting a candidate for recruitment, for promotions and appraisals etc.

There are some basic considerations for running an assessment centers which is again the corporate adaptation of an army process. Assessment centers need to have clearly defined competencies with behavioral indicators and scales for evaluation and the techniques used for assessment should assess these very competencies and behaviors. No other competency or behavior apart from the one identified earlier, however profound, is evaluated. There are several techniques used and multiple assessors are involved to assess candidates in different simulation and exercises.

Simulations exercises are an integral part of both assessment and development centers. They basically are situations, exercises and conditions which imitate the real life working scenario of the assessee. They find a special place in assessments because they allow opportunities to observe and assess the assessee’s behavior pertaining to each job related competency. Examples of simulations include group exercises, in-basket exercises, structured interviews, presentations, and fact-finding exercises.

**Development Center**

Development Centers and assessment centers are often confused as being the same as they use the same techniques to evaluate employees. But there are certain clear differences between them. A development center like an assessment center uses assessment techniques like simulation, psychometrics etc, but the purpose of it is totally different. A development center as the name suggests is conducted only for the developmental purposes of the employees. It is conducted to assess potential, to identify strengths and development needs and the end result is a well documented individual development plan for each participant.

The Development Center can be as long as 3 days where each day the participants undergo simulation exercises. It also, has a pre defined competencies and behaviors as reference point which are assessed during assessments but unlike assessment centers feedback is an important component of development centers. During assessment centers it is only the decision that is
shared with the candidates but in the development center, the candidate is provided feedback after every exercise and towards the closing of the development center an elaborate feedback session may be conducted which lays the foundation for the development of an individual development plan for the participant. As the spirit of a development center is to create an open and transparent atmosphere for learning, mistakes are not treated negatively but are looked upon as learning opportunities by both assessors and assessee. The role of the assessors in the development center also becomes larger as they now have to also play the part of learning partner with the assessee. They are more open to hear the assessee and help them realize and explore their areas of strengths and development.

A development center when used in the organization has a greater acceptability amongst the employees as it is seen as a non-threatening and objective assessment of development areas. Involvement and buy in of line managers can be beautifully integrated in the development center process by sharing information with them regarding the performance of their subordinates or team members and seeking their feedback about the participants on their on the job performance. This creates a partnership which is crucial for the individual development plan created after development center to be acted out and the goals outlined, achieved.

**Assessment Methodologies to Evaluate Competencies**

Both assessment and development centers use a number of simulation techniques to evaluate competencies however any other effort for competency assessment can also use same methods or look for other appropriate ways to evaluate behaviors. It would be interesting to explore a little about some of the most used methods and best practices for assessments in organizations across the world.

The first and the simplest method is that of observing the candidate at his/her work. The natural work environment makes the candidates much relaxed and they display their job related competencies at ease without the usual anxiety that accompanies assessment. This makes the job of the observers easy as well as they get concrete and relevant examples of behaviors to be assessed simultaneously, as they can see them in action.

Structured Interviews are another popular method which are open ended questions asked to the candidate which help explore a particular job related competency better. It happens by asking very specific questions regarding a past performance, cited as example for a competency by the candidate and the observer tries to establish the competency by asking questions about it. A little script would help in understanding better:

Observer: Can you tell me an incident or an example from your work-life where you displayed the competency engaging and inspiring others
Candidate: Yes, last year when I was posted in the XYZ mines in South India, we were running a green initiative on behalf of the organization where we planted around 1000 saplings in the forest area around the mines.

Observer: Who had suggested the idea? At what level were you involved? Did you face any problems? How did you manage them? What do you think was the response of your team to this initiative? Did anyone oppose this? How did you create a buy in for this project? Etc.

The list of questions can be long but the observer has to essentially bring out the fact that if a competency or behavior is displayed, there is a well-defined intent behind it as well.

The next assessment methodology worth exploring is simulation exercises. As these exercises represent situations from the work life of the candidate, they can easily relate to it and therefore job related relevant behaviors are exhibited. Some of the important tools used under simulation exercises are:

Role Play- Using role play in simulation exercises reveal a great deal of information regarding the behaviors. The role play may have a little situation described which is given to the participant and similar information is provided to the observer however the observers are provided with certain leading questions which help to elicit the behaviors to be observed. It is also a good idea to video record the role play which can be played later during washouts with other observers to clearly identify specific behaviors. In some conservative organizations, instead of role plays verbatim are written which also serve the similar purpose of recording the behaviors for later reference.

In Basket- It basically contains some mails, memos and other information on which the candidate has to take decisions after appropriate prioritization. It is a time bound exercise and if it is conducted as a detailed written exercise, the candidates also have to explain the reason behind their decisions.

Case Study- A case studies for the assessment sake can be defined as detailed information regarding the different aspects of an organization, person or situation depending upon the competencies to be judged and has some problem themes running through it. The candidate is required to carefully analyze various relevant aspects of the problems and issues and reach a conclusion regarding the same with a logical reason to support his/her decisions.

Psychometric assessments/Aptitude Tests are another popular method for not just assessing the competencies but also understanding the strengths, personality types and motivation of the candidates. There are psychometric tests which measure specific competencies like teamwork, sales orientation, emotional quotient etc. Cognitive ability tests provide great information regarding the aspects like conceptual problem solving, business and financial acumen etc.
As the approach to competencies are changing, the way it can be assessed is also undergoing a few changes, new methodologies like Appreciative Inquiry and Development Dialogue with the candidate are also being adopted to understand and evaluate their strengths and weaknesses and also as methods to address performance issues and give feedback. Let us understand the concepts behind these two terms. As one can figure out from the term Appreciative Inquiry, it basically is a process which sticks to focusing on the positives or strengths of a person. The idea is that if the positive experiences are focused on it is easier to figure out the strengths of people which then makes it easier to talk about weaknesses and development areas subsequently.

A Development Dialogue is a one-on-one discussion between a senior and a subordinate or can even take place between an observer and a candidate. It covers areas like career goals, motivations an aspirations, development needs etc.

**Intellectual Capital: A Human Resources Perspective**

**Introduction**

The term “Intellectual Capital” collectively refers to all resources that determine the value of an organization, and the competitiveness of an enterprise. Understandably, the term “intellectual capital” from a human resources perspective is not easily translatable into financial terms. For all other assets of a company, there exist standard criteria for expressing their value. Perhaps, this term could more appropriately be called a “non-financial asset.” In an article written by Paolo Magrassi titled “Taxonomy of Intellectual Capital”, 2002, Mr. Magrassi defines human capital as “the knowledge and competencies residing with the company’s employees” and defines organizational intellectual capital as “the collective know-how, even beyond the capabilities of individual employees, that contributes to an organization.”

Although there has been an increasing interest in intellectual capital and an increasing interest in how it might be managed, there has been little written to succinctly describe and define the concept. This column is intended to provide an overview of intellectual capital, where it fits into an organization, what the component elements of it are, and what might be done to manage them.

Intellectual capital can include the skills and knowledge that a company has developed about how to make its goods and services. It also includes insight about information pertaining to the company’s history; customers; vendors; processes; stakeholders; and all other information that might have value for a competitor that, perhaps, is not common knowledge. Intellectual capital is therefore, not only organizational knowledge, it is also industry knowledge. It is the combination of both cognitive knowledge and intuitive/experience-related knowledge.

**Elements of Intellectual Capital**

In all definitions of Intellectual Capital, the following taxonomy can be recognized:
**Relationship Capital:** All business relationships a company entertains with external parties, such as suppliers, partners, clients, vendors, etc.

**Human Capital:** Knowledge and competencies residing with the company’s employees.

**Organizational Capital:** The collective know how, beyond the capabilities of individual employees. E.g. Information systems; policies and procedures; intellectual property. The importance of knowledge pertaining to external parties relevant to an organization has been emphasized as an especially important body of knowledge pertaining to all aspects of the organization.

**Preserving Intellectual Capital**

The problem today in many organizations is employee attrition through layoffs, resignations, retirements, and other forms of employee separation from the company. We would like to ask employers the following question… Are you sure that when the economy sufficiently turns around, you are able to predict if your most valuable employees are about to walk out the door?

Employees have extensive knowledge about their job, the business processes, the data that supports their jobs including how to make things happen, and what works best. Unfortunately, in most instances today their knowledge has not been captured, transferred, or made available to others. In a recent “Business Week” article (Nov. 16, 2009) one of the publication’s editors, Deborah Stead, writes about the importance of identifying and recognizing the importance of preserving intellectual capital. Her article titled “Are Your Employees Just Biding Their Time?”, discusses that the current unemployment rate across the country has scared working Americans into hanging on to their jobs at all costs. The Bureau of Labor Statistics (year-end, 2009) reports that just 1.3% of employees voluntarily resigned their jobs. However, the article goes on to express that employers that do not fully recognize the importance of employees should not count on workers’ loyalty to outlast the recession.

To add to this viewpoint, the BLS reports that the “engagement” or “loyalty” of top-performing employees has dropped by 25% over the past year, largely because people who kept their jobs have been soured by extensive layoffs, cuts and/or elimination of various employee benefit programs, and the significant elimination of promotions. Employers should be mindful that when the job market improves, many of these employees might have become disengaged with their employer, and will move forward to leave their current jobs for other new opportunities.

It is very probable that many employees at this very time are quietly researching other places to work. In a Monster.com survey taken in May, 2009, 79% of jobholders expressed that they had stepped up their search for a new place to work since the recession began. Many employers may not fully grasp what it takes to retain good people. Therefore, “Intellectual Capital” is not only today’s challenge, but will most likely become tomorrow’s asset.
The Importance of Implementing Intellectual Capital Processes

A key challenge today is that employees have tremendous knowledge about their job, the business processes, the data that supports their job and those processes, as well as knowledge of how most effectively to make things happen, and the insight about what works and what does not. Unfortunately, in most situations, they have no means, or incentive, to share their knowledge i.e. Their knowledge has not been captured, transferred, or made available to others. One impact of today’s recession and unemployment situation is that this knowledge is potentially lost to the organization. Human Resources professionals and managers have a major challenge to obtain and store information about:

Core job knowledge of all employees, their experience, and their key skill-sets.

Training is perhaps more important than ever.

**Performance review systems are based upon meaningful metrics.**

Development of effective succession planning systems. Leadership and management development programs.

The successful implementation of new technologies, therefore, is dependent on many factors including the efficient management of human resources systems and processes. The Human Resource Departments are well positioned to ensure the success of knowledge management programs, which are directed at capturing and using employees’ knowledge, and by meaningfully implementing an appreciation for preserving Intellectual Capital.

Global organizations have an even more demanding requirement to capture and understand intellectual capital given differences in language, culture, time zones, and all other forms of communication requirements.

The corporate knowledge base is fluid and must respond to the ebb and flow of required knowledge throughout the organization. Most of the intellectual capital resides in peoples’ heads, and one of the objectives of knowledge capture is to reach out and encourage people to share.

**The Value Factor**

The value to the organization of such a knowledge repository is almost incalculable. Consider the collaboration and communication opportunities and all network/peer relationships that have been established. The knowledge repository could be an invaluable resource database. The opportunities for problem solving and interactive sharing are quite apparent.

**Employee and Management Training & Development**
The knowledge repository could also be used for training new employees. This repository would be a ready-made reference source when there are problems to be solved.

Capturing intellectual capital and the resulting organizational insights could become core and important functions of Human Resources management. At some point, metrics would also be useful to indicate usage, to indicate what is and what is not being accessed, and also to give management a sense of the value of the knowledge repository.

The types of knowledge that would be relevant for intellectual capital are data definitions, business processes, business rules and procedures, specialized technical knowledge, the “fit” with the corporate culture, management styles, organizational history with customers and vendors, and how data flows through the organization.

**Capture Process:**

The capture process would include structured interviews that would be specific to each department and functional area in the organization, and specific to the types of knowledge that would be seen as most important. The results of these interviews would then need to be validated for accuracy and usability. The knowledge repository must be organized to make it both useful and accessible.

**Socialization of Knowledge**

Knowledge builds off other knowledge; it is cumulative. One thought or idea is built from preceding thoughts and ideas. The internet and computer technology offer many vehicles for the socialization of knowledge. Some of these vehicles include the following:

- Groupware and collaborative software
- Wikis
- Portals
- Threaded conversations
- E-mail lists
- Online chats
- Social networking

**Strategies for Implementing Intellectual Capital Knowledge**

One pragmatic recommendation for implementing an Intellectual Capital Knowledge process would be to establish a “pilot” program. This pilot could initially focus on an individual
department within the organization. Human Resources Department would be an excellent choice. The purpose of the pilot would be to evaluate the usefulness of this initiative, to learn from its successes and problems, and to provide a template for the capture and dissemination of knowledge in other departments and functional areas.

This pilot would need a strong sponsor and facilitator. Perhaps this could initially be the senior level Human Resources person. The title of this person, with regard to a pilot program, would essentially be the Chief Knowledge Officer for the organization. To get this off the ground, the participating employees would need to have a high level of buy-in and commitment to this process. The pilot project should be evaluated for the value it provides to the organization. The primary determinant would be the level of access to the knowledge repository. This knowledge repository would need to be effectively maintained and kept current for it to remain valuable.

With the establishment of a pilot program, starting with the Human Resources Department, data would need to be identified and stored in such areas as: (partial listing)

Benefits Administration
Compensation Structure
Compensation Strategies and Practices
Performance Review and Management Data
Recruiting and Hiring Processes
Training & Development Programs
Payroll Services
Human Resource Policies and Procedures
Successful Business Practices
Workplace Safety Information
Data Pertaining To All Compliance Areas
Human Resource Planning Data
Job Descriptions and Job Questionnaire Data
Equal Employment Opportunity Data
Staffing Data
Labor Relations data
Human Resources Management Technologies

An Organization’s “Culture”

Conclusion

In this recessionary business environment that has resulted in extensive layoffs, reduction or elimination of employee development and leadership development programs; reduction or elimination of employee compensation and benefit programs, inactivity of recruiting efforts, and emphasis given more to short-range planning rather than longer-range planning, the principles of Intellectual Capital should remain in clear focus and high priority to those people accountable for the Human Resources function.

All of an organization’s stakeholders can be of tremendous strategic importance to the full-scope of managing Human Resources. In summary, this point which has been central to this column includes the “intangible” intellectual capital knowledge pertaining to employees, customers, vendors, owners, investors, competitors, and any other partner relationships which impact the successful sustainability of the organization. This column should be shared with your HR Director and your Chief Knowledge Officer.

Trade Unions: Meaning, Types and Roles of Trade Unions!

Meaning:

Trade unions are associations of workers formed to represent their interests and improve their pay and working conditions.

Types:

There are four main types of trade unions.

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These are:

i. Craft unions:

These represent workers with particular skills e.g. plumbers and weavers. These workers may be employed in a number of industries.

ii. General unions:

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These unions include workers with a range of skills and from a range of industries.

iii. Industrial unions:
These seek to represent all the workers in a particular industry, for instance, those in the rail industry.

iv. White collar unions:

These unions represent particular professions, including pilots and teachers. Unions in a country, often belong to a national union organisation. For example, in India, a number of unions belong to the All India Trade Union Congress (AITUC).

This is the oldest and one of the largest trade union federations in the country. A number of them also belong to international trade union organisations such as the International Confederation of Free Trade Unions, which has more than 230 affiliated organisations in 150 countries.

Role of Unions:

Unions carry out a number of functions. They negotiate on behalf of their members on pay scales, working hours and working conditions. These areas can include basic pay, overtime payments, holidays, health safety, promotion prospects, maternity and paternity rights and job security.

Depending on the circumstances, unions may try to protect or improve workers’ rights. They also provide information on a range of issues for their members, for instance on pensions. They help with education and training schemes and may also participate in measures designed to increase demand for the product produced and hence for labour.

Some also provide a range of benefits to their members including strike pay, sickness pay and unemployment pay. In addition many get involved in pressurizing their governments to adopt a legislation, which will benefit their members or workers in general, such as fixing a national minimum wage.

Collective Bargaining:

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An individual worker may not have the skill, time or willingness to negotiate with her or his employer. A worker is also likely to have limited bargaining power. If she or he presses for a wage rise or an improvement in working conditions, the employer may be able to dismiss her or him and take on someone as a replacement. Unions enable workers to press their claims through collective bargaining. This process involves negotiations between union officials, representing a group of workers, and representatives of employers.

The Basis of Wage Claims:

There are a number of arguments, a union can put forward while asking for a wage rise. One is that the workers deserve to be paid more because they have been working harder and have
increased productivity. Another argument is that an industry whose profits have risen can afford to pay higher wages to its workers.

This argument may be linked to the first one as the workers are likely to have contributed to the higher profits. A third argument is known as the comparability argument. A union may argue that the workers it represents should receive a pay rise to keep their pay in line with similar workers. For instance, a union representing nurses may press for a wage rise if doctors are awarded higher pay.

The nurses’ union is unlikely to ask for the same pay as doctors. What is more likely is that they will seek to maintain their wage differential. So, if before the rise of doctors’ pay, nurses received a wage that was 60% of the doctors’ earnings, they are likely to demand a rise that will restore this differential.

A fourth argument that is often put forward is that workers need a wage rise to meet the increased cost of living. If the price level is rising by 6%, workers will need a wage rise of at least 6% to maintain their wage’s purchasing power. This is sometimes referred to as maintaining their real income (income adjusted for inflation).

Role and Importance of Trade Unions Across the World!

The role and importance of trade unions varies across the world. In fact in some countries, including the Maldives and Saudi Arabia, trade unions are illegal. Industrial workers in Pakistan have the right to form trade unions but a number of laws restrict their actions and hence their effectiveness.

The government can, for instance, ban any strike that may cause ‘serious hardship for the community’, endanger the national interest or has continued for 30 days or more. The law is even more restrictive in the case of agricultural workers who are prevented from forming any unions.

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Union membership, as a percentage of the labour force, is high in Mauritius. Approximately a quarter of workers are in a union. The rate is; however, lower in the country’s Export Processing Zones (EPZs). In these areas, managers often make it difficult for workers to join a union by threatening to close down their factories if workers join unions.

Unions are more powerful in European countries. They are particularly strong in the Nordic countries of Finland and Sweden, where union membership is high. Union membership fell in the UK in the 1980s and 1990s for two main reasons.

One was legislation which reduced trade union rights and the other was a rise in unemployment, particularly in sectors that had been heavily unionized. In more recent years, membership has grown amongst women workers.
It continues to be higher among public sector workers than private sector workers. France has one of the lowest union densities in Europe, with approximately only 8% of workers belonging to trade unions (in comparison to 30% in UK). French unions do, however, exert considerable power.

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This is because the unions enjoy public support, are willing to take strike action and French laws secure the importance of their role. For instance, in France, unemployment benefit is set by an independent body which has to negotiate with unions and union representatives have the right to seat on firms’ works councils.


1. Small Size:

According to the veteran trade union leader V.V. Giri, “the trade union movement in India is plagued by the predominance of small sized unions”. To quote there were 9,023 trade unions submitting returns during the year 1992. The total membership of these unions was 57.4 lakhs, with an average membership of 632 per union. Nearly three-fourths of the unions have a membership of less than 500. Smallness in size of the union implies, among other things, weakness in bargaining power.

2. Poor Finance:

Small size of unions has its direct bearing on its financial health. Total income and total expenditure of 9,073 trade unions with a membership of 57.4 lakhs were Rs. 3,238 lakhs and Rs. 2,532 lakhs respectively in 1992. The per member income and expenditure, thus, come to Rs. 56.4 and Rs. 44.1 respectively”. These are, by all means, very low. It is the small size of trade unions accompanied by small subscriptions; the trade unions cannot undertake welfare activities.

3. Politicisation:

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A serious defect of the trade union movement in India is that the leadership has been provided by outsiders’ especially professional politicians. Leaders being affiliated to one or the other party, the unions were more engrossed in toeing the lines of their political leaders than protecting workers’ interests.

Ironically, in many cases, the political leaders possess little knowledge of the background of labour problems, fundamentals of trade unionism, the techniques of industry, and even little
general education. Naturally, unions cannot be expected to function efficiently and on a sound basis under the guidance of such leaders.

4. Multiplicity of Unions:

Of late, trade unionism in India is also characterised by multiplicity of unions based on craft, creed and religion. This is well indicated by the socio-political realities after the mandalisation of polity and heightened sectarian consciousness after the demolition of the disputed structure of Ayodhya.

As noted earlier, the multiplicity of unions is mind-boggling in the DTC (50), the SAIL (240) and the Calcutta Corporations (100). The implication of multiplicity of trade unions is that it leads to union’s rivalry in the organization. Obviously, multiplicity of unions contributes to fragmentation to workers leading to small-sized unions.

5. Lack of Enlightened Labour Force:

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The lack of an enlightened labour force capable of manning and conducting the movement efficiently, purposefully and effectively has been a major problem in the development of trade unions in the country. Lack of education, division by race religion, language and caste, migratory nature, lack of self consciousness, and non-permanent class of workers have been attributed as the causes for the lack of enlightened labour force in India.

6. Miscellaneous Problems:

The other problems from which trade union movement has suffered include:

(i) The majority of registered unions are independent unions as only 16,000 units out of 50,000 registered unions are affiliated to the Central Trade Unions (CTUs). One possible reason for this is the educated workers’ preference to the independent unions,

(ii) It is also found that about 90% of workers in the public sector are unionized while in case of the private sector only 30 % workers are unionized”. This is a World-Wide trend, not only featuring in India. But it has a serious implication for trade union movement in India as more and more public sector undertakings are privatized. In turn, the trade union membership is to decline, a trend already visible by now.

(iii) Given the fast changing industrial scenario, jobs are moving from the organized formal sector to informal sector. However, the unorganised sector which constitutes about 90% of the total work force does not come under the purview of the trade unions.

The Second Five-Year Plan scanned the defects of the trade union movement in India as follows:
“Multiplicity of trade unions, political rivalries, lack of resources, disunity in the ranks of workers etc., are some of the major weaknesses in a number of existing unions”.

Unit-4

The difference between coaching and mentoring isn’t clear-cut. A mentor may draw on a number of approaches: teaching, coaching, and counselling. Indeed it can be argued that these areas often occupy the same developmental space. Nonetheless, one significant difference between mentoring and coaching and other forms of development is the relationship forged between two people.

Coaching

The focus of coaching is usually task and performance. The role of a skills or performance coach is to give feedback on observed performance. Consequently, coaching usually happens at the workplace.

The coach is likely to set or suggest goals for the learner; measuring performance periodically as the learner develops new skills. This needs a good working relationship between learner and coach.

Teaching

The focus of teaching is to impart knowledge and information through instruction and explanation. And the goal for the student is usually to pass a test. Once again, learning has a one-way flow. However, unlike coaching the closeness of the relationship between teacher and student is often low.

Counselling

Counseling is defined as a way of relating and responding to another person so that he/she is helped to explore his thoughts, feelings and behavior to reach a clear self-understanding. Also, the person is helped to find and use his/her strengths to be able to cope more effectively with making appropriate decisions, or taking appropriate action.
The ability to counsel is an important skill for managers and caring co-workers. Organizations that have people trained in counseling will be better able to handle their people issues than those that do not. Staffs who is feeling anxious, stressed, or unhappy will not be able to perform very well on the job despite their background and experience. If they have had an opportunity to talk through their problems with a trained counselor, they will be able to be much more productive. This will save the organization time and money.

The counsellor uses listening and questioning to build self-awareness and self-confidence in the client. The goal is to help the person deal with something difficult. Once again learning is one-way and the closeness of the relationship low.

Mentoring

The role of the mentor is to build capability. The developmental mentor helps the learner discover their own wisdom by encouraging them to work towards career goals or develop self-reliance.

The Mentor Helps the Learner Discover their Wisdom.

We use Coaching Services in human resources management to :

- **Attract, motivate and retain**: By developing staff skills you can motivate existing employees, appeal to new applicants and retain your valued HR resources.

- **Reduce costs**: Why waste money on unnecessary training courses, or additional staffing costs, when you can develop the skills you need with expert guidance and support from performHR.

- **Increase effectiveness**: Improve the efficiency of your organisation by equipping your staff to address HR-related projects quickly and effectively.

- **Be part of a team**: Work with a mentor and a network of likeminded HR professionals to test new ideas and share experiences collaboratively.

- **Achieve more**: Increasing in-house HR expertise with support from HR mentors enables your organisation to independently complete new projects, review HR practices and achieve more for your business.
PCMM,

People Capability Maturity Model (short names: People CMM, PCMM, P-CMM) is a maturity framework that focuses on continuously improving the management and development of the human assets of an organization. It describes an evolutionary improvement path from ad hoc, inconsistently performed practices, to a mature, disciplined, and continuously improving development of the knowledge, skills, and motivation of the workforce that enhances strategic business performance. Related to fields such as human resources, knowledge management, and organizational development, the People CMM guides organizations in improving their processes for managing and developing their workforces. The People CMM helps organizations characterize the maturity of their workforce practices, establish a program of continuous workforce development, set priorities for improvement actions, integrate workforce development with process improvement, and establish a culture of excellence. The term was promoted in 1995, published in book form in 2001, and a second edition was published in July 2009.

Description

The People CMM consists of five maturity levels that establish successive foundations for continuously improving individual competencies, developing effective teams, motivating improved performance, and shaping the workforce the organization needs to accomplish its future business plans. Each maturity level is a well-defined evolutionary plateau that institutionalizes new capabilities for developing the organization’s workforce. By following the maturity framework, an organization can avoid introducing workforce practices that its employees are unprepared to implement effectively.

The People CMM has been published in book form.

Structure;
People Capability Maturity Model

The People CMM document describes the People CMM, the practices that constitute each of its maturity levels, and information on how to apply it in guiding organizational improvements. It describes an organization's capability for developing its workforce at each maturity level. It describes how the People CMM can be applied as a standard for assessing workforce practices and as a guide in planning and implementing improvement activities.

Version 2 of the People CMM has been designed to correct known issues in Version 1, which was released in 1995; to add enhancements learned from five years of implementation experience; and to integrate the model better with CMMI and its IPPD extensions. The primary motivation for updating the People CMM was the error in Version 1 of placing team-building activities at Maturity Level 4. The authors made this placement based on substantial feedback that it should not be placed at Maturity Level 3, as it had been in early review releases. Experience has indicated that many organizations initiate formal development of workgroups while working toward Maturity Level 3. Thus, Version 2 of the People CMM initiates process-driven workgroup development at Maturity Level 3. This change is consistent with the placing of integrated teaming activities at Maturity Level 3 of the CMMI-IPPD.

THE BALANCED SCORECARD

is a strategy performance management tool – a semi-standard structured report, that can be used by managers to keep track of the execution of activities by the staff within their control and to monitor the consequences arising from these actions.

The phrase 'balanced scorecard' primarily refers to a performance management report used by a management team, and typically this team is focused on managing the implementation of a strategy or operational activities - in a recent survey 62% of respondents reported using Balanced
Scorecard for strategy implementation management, 48% for operational management. Balanced Scorecard is also used by individuals to track personal performance, but this is less common - only 17% of respondents in the survey using Balanced Scorecard in this way, however it is clear from the same survey that a larger proportion (about 30%) use corporate Balanced Scorecard elements to inform personal goal setting and incentive calculations.

The critical characteristics that define a balanced scorecard are:

its focus on the strategic agenda of the organization concerned
the selection of a small number of data items to monitor
a mix of financial and non-financial data items.

Balanced scorecard is an example of a closed-loop controller or cybernetic control applied to the management of the implementation of a strategy. Closed-loop or cybernetic control is where actual performance is measured, the measured value is compared to a reference value and based on the difference between the two corrective interventions are made as required. Such control requires three things to be effective:

a choice of data to measure, the setting of a reference value for the data, the ability to make a corrective intervention. Within the strategy management context, all three of these characteristic closed-loop control elements need to be derived from the organisation's strategy and also need to reflect the ability of the observer to both monitor performance and subsequently intervene – both of which may be constrained. Balanced Scorecard was initially proposed as a general purpose performance management system. Subsequently, it was promoted specifically as an approach to strategic performance management. Balanced scorecard has more recently become a key component of structured approaches corporate strategic management.

Two of the ideas that underpin modern balanced scorecard designs concern making it easier to select which data to observe, and ensuring that the choice of data is consistent with the ability of the observer to intervene.

History:

Organizations have used systems consisting of a mix of financial and non-financial measures to track progress for quite some time. One such system was created by Art Schneiderman in 1987 at Analog Devices, a mid-sized semi-conductor company; the Analog Devices Balanced Scorecard. Schneiderman's design was similar to what is now recognised as a "First Generation" Balanced Scorecard design.

In 1990 Art Schneiderman participated in an unrelated research study led by Robert S. Kaplan in conjunction with US management consultancy Nolan-Norton, and during this study described his work on performance measurement. Subsequently, Kaplan and David P. Norton included
anonymous details of this balanced scorecard design in a 1992 article. Kaplan and Norton's article wasn't the only paper on the topic published in early 1992 but the 1992 Kaplan and Norton paper was a popular success, and was quickly followed by a second in 1993. In 1996, the two authors published a book The Balanced Scorecard. These articles and the first book spread knowledge of the concept of balanced scorecard widely, and has led to Kaplan and Norton being seen as the creators of the concept.

While the "corporate scorecard" terminology was coined by Art Schneiderman, the roots of performance management as an activity run deep in management literature and practice. Management historians such as Alfred Chandler suggest the origins of performance management can be seen in the emergence of the complex organisation – most notably during the 19th Century in the USA. More recent influences may include the pioneering work of General Electric on performance measurement reporting in the 1950s and the work of French process engineers (who created the tableau de bord – literally, a "dashboard" of performance measures) in the early part of the 20th century. The tool also draws strongly on the ideas of the 'resource based view of the firm proposed by Edith Penrose. However it should be noted that none of these influences is explicitly linked to original descriptions of balanced scorecard by Schneiderman, Maisel, or Kaplan & Norton.

As the title of Kaplan and Norton's second book highlights, even by 2000 the focus of attention among thought-leaders was moving from the design of Balanced Scorecards themselves, towards the use of Balanced Scorecard as a focal point within a more comprehensive strategic management system. Subsequent writing on Balanced Scorecard by Kaplan & Norton has focused on uses of Balanced Scorecard rather than its design (e.g. "The Execution Premium" in 2008), however many others have continued to refine the device itself (e.g. Abernethy et al.).

Characteristics:

The characteristics of the balanced scorecard and its derivatives is the presentation of a mixture of financial and non-financial measures each compared to a 'target' value within a single concise report. The report is not meant to be a replacement for traditional financial or operational reports but a succinct summary that captures the information most relevant to those reading it. It is the method by which this 'most relevant' information is determined (i.e., the design processes used to select the content) that most differentiates the various versions of the tool in circulation. The balanced scorecard indirectly also provides a useful insight into an organisation's strategy – by requiring general strategic statements (e.g. mission, vision) to be precipitated into more specific/tangible forms.

The first versions of balanced scorecard asserted that relevance should derive from the corporate strategy, and proposed design methods that focused on choosing measures and targets associated with the main activities required to implement the strategy. As the initial audience for this were the readers of the Harvard Business Review, the proposal was translated into a form that made
sense to a typical reader of that journal – managers of US commercial businesses. Accordingly, initial designs were encouraged to measure three categories of non-financial measure in addition to financial outputs – those of "customer," "internal business processes" and "learning and growth." These categories were not so relevant to public sector or non-profit organisations, Modern balanced scorecards have evolved since the initial ideas proposed in the late 1980s and early 1990s, and the modern performance management tools including Balanced Scorecard are significantly improved – being more flexible (to suit a wider range of organisational types) and more effective (as design methods have evolved to make them easier to design, and use).

Design

Design of a balanced scorecard is about the identification of a small number of financial and non-financial measures and attaching targets to them, so that when they are reviewed it is possible to determine whether current performance 'meets expectations'. By alerting managers to areas where performance deviates from expectations, they can be encouraged to focus their attention on these areas, and hopefully as a result trigger improved performance within the part of the organization they lead.

The original thinking behind a balanced scorecard was for it to be focused on information relating to the implementation of a strategy, and over time there has been a blurring of the boundaries between conventional strategic planning and control activities and those required to design a balanced scorecard. This is illustrated well by the four steps required to design a balanced scorecard included in Kaplan & Norton's writing on the subject in the late 1990s:

Translating the vision into operational goals;

Communicating the vision and link it to individual performance;

Business planning; index setting

Feedback and learning, and adjusting the strategy accordingly.

These steps go far beyond the simple task of identifying a small number of financial and non-financial measures, but illustrate the requirement for whatever design process is used to fit within broader thinking about how the resulting balanced scorecard will integrate with the wider business management process.

First Generation

The first generation of balanced scorecard designs used a "four perspective" approach to identify what measures to use to track the implementation of strategy. The original four "perspectives" proposed were:

Financial: encourages the identification of a few relevant high-level financial measures. In particular, designers were encouraged to choose measures that helped inform the answer to the
question "How do we look to shareholders?" Examples: cash flow, sales growth, operating income, return on equity.

Customer: encourages the identification of measures that answer the question "What is important to our customers and stakeholders?" Examples: percent of sales from new products, on time delivery, share of important customers’ purchases, ranking by important customers.

Internal business processes: encourages the identification of measures that answer the question "What must we excel at?" Examples: cycle time, unit cost, yield, new product introductions.

Learning and growth: encourages the identification of measures that answer the question "How can we continue to improve, create value and innovate?" Examples: time to develop new generation of products, life cycle to product maturity, time to market versus competition.

These suggestions were notably triggered by a recognition that different but equivalent headings would yield alternative sets of measures, and this represents the major design challenge faced with this type of balanced scorecard design: justifying the choice of measures made. "Of all the measures you could have chosen, why did you choose these?" These issues contribute to dissatisfaction with early Balanced Scorecard designs, since if users are not confident that the measures within the Balanced Scorecard are well chosen, they will have less confidence in the information it provides.

Second generation

In the mid-1990s, an improved design method emerged. In the new method, measures are selected based on a set of "strategic objectives" plotted on a "strategic linkage model" or "strategy map". With this modified approach, the strategic objectives are distributed across the four measurement perspectives, so as to "connect the dots" to form a visual presentation of strategy and measures.

In this modified version of balanced scorecard design, managers select a few strategic objectives within each of the perspectives, and then define the cause-effect chain among these objectives by drawing links between them to create a "strategic linkage model". A balanced scorecard of strategic performance measures is then derived directly by selecting one or two measures for each strategic objective. This type of approach provides greater contextual justification for the measures chosen, and is generally easier for managers to work through. This style of balanced scorecard has been commonly used since 1996 or so: it is significantly different in approach to the methods originally proposed, and so can be thought of as representing the "2nd generation" of design approach adopted for balanced scorecard since its introduction.

Third generation]

Third-generation balanced scorecard
In the late 1990s, the design approach had evolved yet again. One problem with the "second generation" design approach described above was that the plotting of causal links amongst twenty or so medium-term strategic goals was still a relatively abstract activity. In practice it ignored the fact that opportunities to intervene, to influence strategic goals are, and need to be, anchored in current and real management activity. Secondly, the need to "roll forward" and test the impact of these goals necessitated the creation of an additional design instrument: the Vision or Destination Statement. This device was a statement of what "strategic success", or the "strategic end-state", looked like. It was quickly realized that if a Destination Statement was created at the beginning of the design process, then it was easier to select strategic activity and outcome objectives to respond to it. Measures and targets could then be selected to track the achievement of these objectives. Design methods that incorporate a Destination Statement or equivalent (e.g. the results-based management method proposed by the UN in 2002) represent a tangibly different design approach to those that went before, and have been proposed as representing a "third generation" design method for balanced scorecards.

Design methods for balanced scorecards continue to evolve and adapt to reflect the deficiencies in the currently used methods, and the particular needs of communities of interest (e.g. NGO's and government departments have found the third generation methods embedded in results-based management more useful than first or second generation design methods).

This generation refined the second generation of balanced scorecards to give more relevance and functionality to strategic objectives. The major difference is the incorporation of Destination Statements. Other key components are strategic objectives, strategic linkage model and perspectives, measures and initiatives.

Criticism

Academic criticism of the balanced scorecard can be broken into three distinct (but overlapping) areas of concern.

The first kind of criticism focuses on the empirical nature of the framework, and when it was originally proposed the lack of any formal validation of the ideas. Kaplan and Norton notoriously failed to include any citations of earlier articles in their initial papers on the topic, an absence noted, for example, by Norreklit. Others identified technical flaws in the methods and design of the original balanced scorecard or concerning the lack of validation for the approach - for example Flamholtz observed that no validation was provided for the choice of the "four perspectives" of the 1st Generation design:

The second kind of criticism is that the balanced scorecard does not provide a bottom line score or a unified view with clear recommendations: it is simply a list of metrics (e.g. Jensen 2001). These critics usually include in their criticism suggestions about how the 'unanswered' question postulated could be answered, but typically the unanswered question relate to things outside the scope of balanced scorecard itself (such as developing strategies) (e.g. Brignall)
The third kind of criticism is that the model fails to fully reflect the needs of stakeholders – putting bias on financial stakeholders over others. Early forms of Balanced Scorecard proposed by Kaplan & Norton focused on the needs of commercial organisations in the USA – where this focus on investment return was appropriate. This focus was maintained through subsequent revisions. Even now over 20 years after they were first proposed, the four most common perspectives in Balanced Scorecard designs mirror the four proposed in the original Kaplan & Norton paper. However, as noted earlier in this article, there have been many studies that suggest other perspectives might better reflect the priorities of organisations – particularly but not exclusively relating to the needs of organisations in the public and Non Governmental sectors. For instance, the balanced scorecard does not address important aspects of nonprofit strategy such as social dimensions, human resource elements, political issues and the distinctive nature of competition and collaboration in nonprofit settings. More modern design approaches such as 3rd Generation Balanced Scorecard, the Public Sector Scorecard and the UN's Results Based Management methods explicitly consider the interests of wider stakeholder groups, and perhaps address this issue in its entirety.

In response to these concerns there have been many studies seeking to provide (retrospective) academic underpinnings for the Balanced Scorecard concept, and to provide case study and validation information for the various design generations. There are relatively few reliable assessments of the effectiveness of the approaches embodied in Balanced Scorecard, but some studies demonstrate a link between the use of balanced scorecards and better decision making or improved financial performance of companies.

Broadcast surveys of usage have difficulties in this respect, due to the wide variations in definition of 'what a balanced scorecard is' noted above (making it hard to work out in a survey if you are comparing like with like). Single organization case studies suffer from the 'lack of a control' issue common to any study of organizational change – what the organization would have achieved if the change had not been made isn't known, so it is difficult to attribute changes observed over time to a single intervention (such as introducing a balanced scorecard). However, such studies as have been done have typically found balanced scorecard to be useful.

Consideration has been given to the effect of organisation size on Balanced Scorecard effectiveness:

With a competency based job description, you are on your way to begin mapping the competencies throughout your HR processes. The competencies of the respective job description become your factors for assessment on the performance evaluation. Using competencies will help guide you to perform more objective evaluations based on displayed or not displayed behaviors.

Taking the competency mapping one step further, you can use the results of your evaluation to identify in what competencies individuals need additional development or training. This will
help you focus your training needs on the goals of the position and company and help your employees develop toward the ultimate success of the organization.

To help you with the implementation of these steps and to learn more about competency mapping, we recommend further reading the following resources:

The Art and Science of Competency Models: Pinpointing Critical Success Factors in Organizations by Richard Lepsinger, Anntoinette D. Lucia

Building Robust Competencies: Linking Human Resource Systems to Organizational Strategies by Paul C. Green

Human Resources Champion by David Ulrich

competency Mapping is a process of identifying key competencies for an organization and/or a job and incorporating those competencies throughout the various processes (i.e. job evaluation, training, recruitment) of the organization.