

STRATEGIC ORGANISATIONAL
TRAINING NEEDS;

DO YACHTS OFFER A NEW DIMENSION
FOR DEVELOPMENT ?

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Edit 1

SUMMARY

The system described below for the development of managers by experiential learning using yachts as a medium, was researched and designed as part of a Masters degree. The intention was to identify best practice both from refereed publications, and by tripartite research involving Outdoor course providers, training managers who had utilised this style of training and participants on the courses.

The courses were examined in relation to two theory models. An overview was provided by the adaptation and linking of models suggested by Fredericks et al (1996) The Strategy-HRD connection, and Stone (1991) A Pragmatic Framework, the systematic training cycle.

The increasing use of competency based training has prompted a subsequent review, and the integration of the work of Quinn et al 1994. Becoming a Master Manager. A Competency Framework. This model is both strategic, and has predictive ability. It also provides a link between the development stages in an organisation's life cycle and the changing emphasis on different individual competencies.

A wide variation among providers was found in relation to;- their awareness of strategic corporate issues, their ability to facilitate learning on particular issues, and their understanding of the theory underlying the facilitation process itself. Delegates, without exception considered their OMD course to have been significantly more effective in facilitating learning than they would expect of an input by traditional methods. All delegates indicated significant improvements in the objectives targeted by their respective courses and most were able to give examples of improvement in their performance at the job behaviour level (Kirkpatrick 1967).

Research showed that OMD is very effective in satisfying a range of development needs. The importance of the facilitator role in the whole training intervention is highlighted in many respects throughout the research.

The provision of true management development courses on yachts is still in its infancy. The apparent lack of appropriately designed tasks is a major restriction to their current use. There is no apparent reason why such tasks cannot be designed.

The advantage of yachts may be the provision of a strategic dimension to metaphorical transfer not evident in the land-based courses researched. The potential for all the tasks to be towards a common and ultimate goal, (for the delegates to sail the yacht) can be isomorphically linked to strategic organisational goals. Yachts are potentially more effective than land as the medium for experiential learning and management development in the outdoors.

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INTRODUCTION

Jones (1993 pp 223) describes Outdoor Management Development (OMD) as;-
“this widely used, but under researched and poorly understood form of training”.

The following framework (figure 1) is used in considering the strategic relevance and application of training and development interventions. The inclusion of the strategic framework enables the consideration of corporate strategy, structure, and the information flows which link them to training strategy. General Human Resource Management responsibilities and function are also considered.

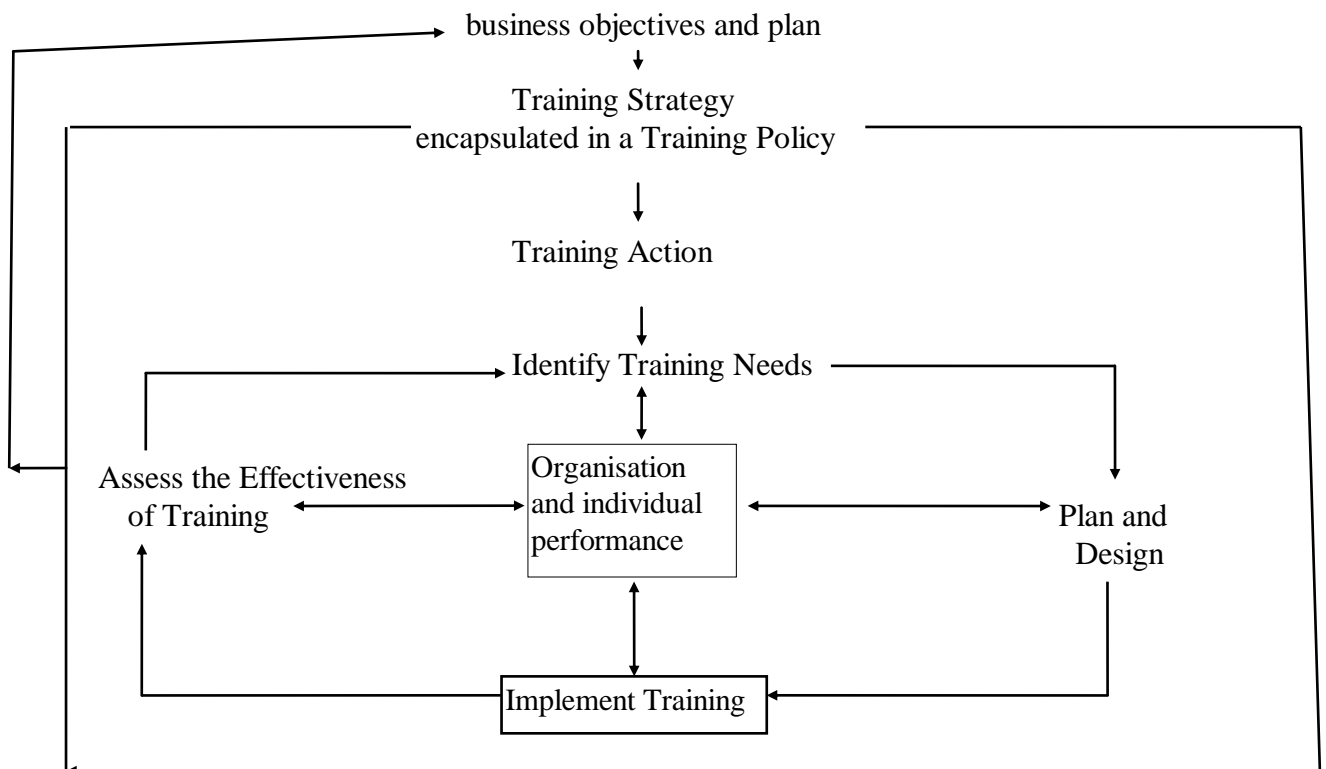


Figure 1 Business Plan - Systematic Cycle link

What is Outdoor Management Development?

The deepest roots of development training can be traced to the fourth century BC, when Plato, described education as “the simultaneous and harmonious development of all aspects of the human personality”. (in Everard 1993)

“Views of Outdoor Management Development vary between two extremes. For advocates, OMD appears to hold almost mystical power to promote revolutionary, performance-enhancing changes for those experiencing it. The sceptics believe that it is a series of contrived, irrelevant and superficial attempts to create organisational metaphors away from the workplace; and at worst, a highly discriminatory form of training fraught with unjustifiable physical and psychological danger” (Jones 1993. pp210)

It is suggested by Jones (1993) that in comparison with other Management Development techniques OMD is perhaps unique in the extent to which it invokes the complete learning cycle, the physical and mental stress together with the subjective risk combine to increase the memorability of the experience. These factors increase the probability that what was learnt will be remembered and transferred to the workplace.

Dainty & Lucas (1992) note that “Programmes can differ quite considerably, not only in terms of the types of tasks that participants are asked to perform, but also in terms of the type of review process utilised, and the overall outcomes that are intended by the course organisers.”

LITERATURE REVIEW

THE STRATEGY-HRD CONNECTION

It is the human resource department in a proactive stance that assumes some responsibility for the communication and implementation of strategic issues within an organisation. This responsibility together with the advisory role played by training managers potentially provide the link between strategic needs and training interventions.

The framework below is suggested as a tool with which to ;- i) identify companies strategic orientation, and how it informs training action, and ii) to identify issues relevant in each company for assessing the effectiveness of a training intervention

Within the HR role there is a focus on training and development issues. Consideration is given to the relevance of management styles, and to organisational culture. An awareness of change and the tendency for a culture of enablement to be utilised to cope with it is detailed.

Strategy - HRD Connection

Fredericks et al (1996 pp103).see organisation structure a common factor among much management theory and use this as a key concept of their model. Defined by Fredericks et al .(1996 pp103).as “...organisational arrangements to do with authority relations which, in turn, have the effect of setting limits, or constraining the actions and behaviours of individual organisation members” i.e. the internal relations.

A wide range of views are to be found on organisation strategy. Fredericks et al (1996) define it as “those organisation decisions and actions which are intended to and/or have an impact on the long-term survival of the organisation within its operating environment.” The ‘environment’ described can be elaborated upon by examining the following external factors P.E.S.T.L.E; - Political - Economic - Social - Technological - Legal - Environmental

Management style

Management style is a function of ;- knowledge, skills, beliefs and values of the individual manager, and manifests as the individual’s actions and behaviours concerned with managerial decision making. Top managers are more concerned with the construction of authority relationships and the lower managers are concerned with operating within them

Fredericks et al see strategy and structure as separate but interdependent (see figure 3). This view is shared by Tichy et al (1982). However, where Fredericks et al consider Management style Tichy et al’s model (see figure 5) incorporates Human Resource Management in its entirety. Johnson & Scholes (1989) place more emphasis on strategy, dividing it into analysis, choice and implementation, and show organisation structure as a sub-element of strategic implementation.

In this model (see figure 3) , the extent to which strategic decisions are known, understood, and agreed with by organisation members will affect their actions and behaviours. Communication / information flow within the organisation will affect the extent to which these decisions are known

Recognising that intended and actual strategy frequently differ, Frederick et al suggest that if the actions/behaviours could be identified that would bring about the intended strategy, and

further that if those actual actions/behaviours could be attained then both actual and intended strategy would be the same

Management style develops from an individuals values and beliefs about themselves, others, work situations, both in the abstract and the particular. This influences their approach to their work, and how they interact with others.

Fredericks et al consider that management decisions are influenced along a continuum, at one extreme the ‘belief in enabling’ deriving from a recognition of the importance of organisation strategy in their work. This view equates readily with the view of Morgan (1986) of ‘Organisations as Organisms’.

The ‘belief in conforming’ lies at the other end of the continuum, emphasising the importance of structure as the co-ordinating mechanism equating to Morgan’s (1986) Organisations as machines.

In my opinion this is rather simplistic and the range is better illustrated by Quinn et al (1983), though their ‘entrepreneurial stage’ may equate with the ‘enabling’ and their ‘control stage’ to the ‘conforming’ of Fredericks et al, with the other stages identified by Quinn lying between.

The problem in believing that the ‘belief in conforming’ is suitable in ‘stable environmental conditions with a low level of complexity’ is that;-

“Even to stand still in todays world requires managers to become skilful at managing change, because the environment within which one is trying to remain static is itself changing so fast” (Robinson 1992)

Within the confines of organisation structure there is scope for individual discretion, i.e. “limits and potentialities’ in relation to their behaviour and actions arising from their participation in the organisation” Fredericks et al (1996)

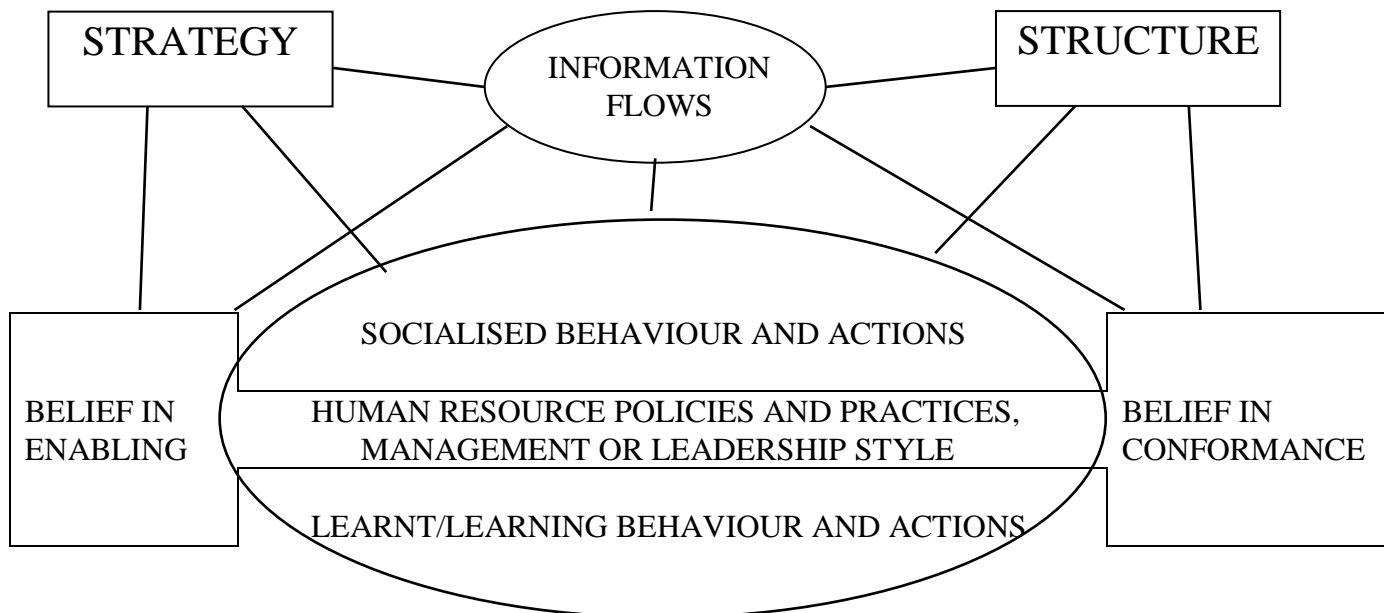


Figure 2. A strategic HRD view

HRD Practice

The primary role of proactive HRD practice then, is to create capability within the organisation to facilitate the above mentioned adaptation, change and development which is necessary to allow effective response to strategic environmental conditions

Fredericks et al (1996) argue that by considering the following questions it will be possible to identify the organisation current location (org' context); 1) by considering P.E.S.T.L.E (external) mentioned earlier, and value chain analysis (internal).

2) by the use of their model, which gives consideration to the list below;-

are beliefs orientated to conformance or enabling

is there a dominant management style

does current HR practice endorse/support that style

where is the space between socialised and learnt/learning behaviour

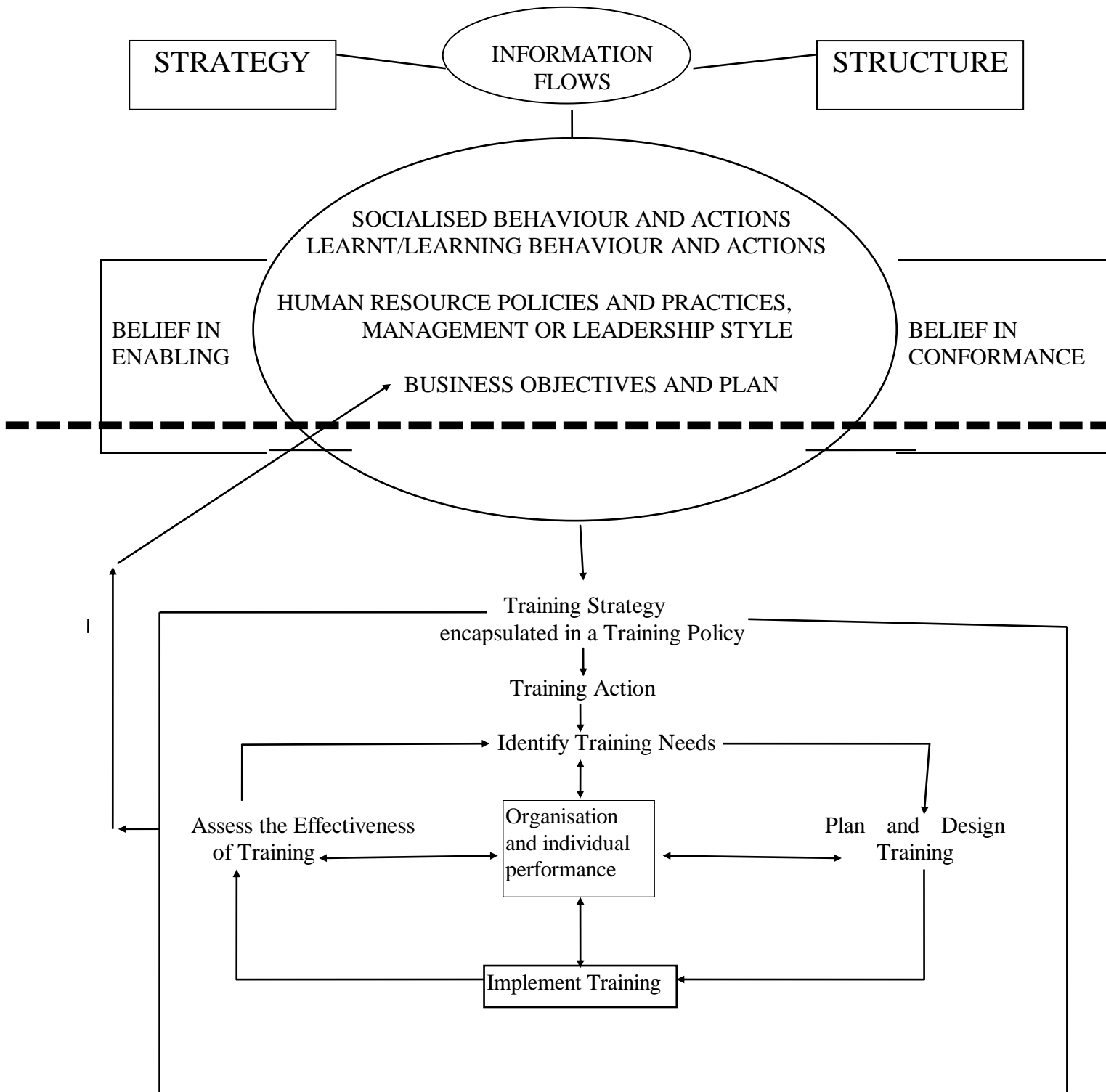
how can new actions-beliefs become possible

Any contradictions apparent in the context will highlight 'both potential and preferred directions for change. The effective consideration of these issues requires active liaison by HRD personnel, especially with managers, requiring additional elements of proactive practice.

The preferred directions for change will be encapsulated in the 'business objectives and plan' of Stone's (1991) model. It is this area which seems to cause the most problems in reality, in that an effective link between strategic issues and the resultant training strategy is not always clear

A simplified version of Fredericks (1996) model, is incorporated with that of Stone (1991) (see figure 4) to provide an overview of my area of study.

Figure 3 Training strategy - HRD link



Training Strategy/Business Strategy Link

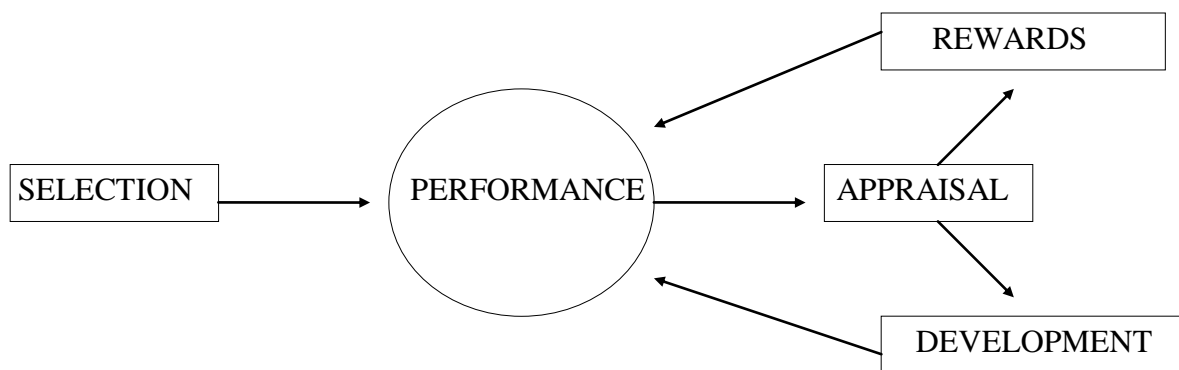
The training strategy is frequently encapsulated within a training policy. The policy will frequently contain a statement of principles and aims which must be followed. Such policies can act as a restriction on managers, but for others can act as a guide such that managers make decisions in keeping with the broader organisational goals. (Reid et al 1992). There is the assumption within this statement of a matching of corporate strategic goals and training strategy. This matching is by no means a foregone conclusion. Frequently in this area

there are major difficulties within organisations regarding what is required to realise corporate goals and what is being supplied in training action towards that end.

The proactivity of the HR function can have a significant impact in this area. Tichy et al (1982) in their model (Figure 5) below emphasise the importance of development within the HR function, with performance being central to the model. Further, we see that Fredericks et al (1996) link proactive HR to strategy and to a belief in enabling, providing an ability to change in response to changing environmental conditions

I consider that this flexibility, together with the vital part that the HR function plays in the information flows combine to give a potentially better link between strategy and the training function.

Figure 4 Tichy et al (1982)



Sloman (1994 pp76) acknowledges that successful training and development must be aligned with business strategy and recognises that this alignment is easier to achieve where a high profile business initiative is in existence, e.g. TQM.

He makes some practical suggestions for providing the link;-

- trainers or training managers having a theoretical understanding of the strategic management process,
- trainers ascertaining the methods used in their organisation, and distinguishing between strategy formulation and formation

the HRM implications of strategic options should be articulated and developed using a proactive rather than a reactive approach, and as part of the broader human resource management activities. (pp63).

By following these as a guide it may be possible, even where there is no training policy, for trainers and the training function to be conditioned by top management's expectations of their training role.

Organisational culture

The organisations culture and Management style are often the responsibility of the HR dept. Reid et al (!992) identify five main culture types and indicate the implications for training interventions. (see appendix 5)

Culture types;- Power-based, - People-based, - Role-based, - Task-based, - Quality-based.

SYSTEMATIC TRAINING CYCLE

It is within the HRD function that the systematic training cycle is operated, the use of which gives coherence to training and development interventions. Adherence to the cycle provides the opportunity to develop a learning organisation. Each aspect of the cycle is considered vital to this dissertation and therefore each has its own introduction.

Identification of Training Needs

This section will discuss the importance of training needs analysis (TNA) in relation to the assessing of effectiveness of development courses. Also the relevance of TNA as the starting point from which to structure course content. The different levels of training needs, the classification of those needs and methods of their analysis are also discussed.

Levels of training needs

Stewart (1994) separates training needs into the following 3 levels;-

Strategic level- where there are shortfalls in the performance of the organisation, and consideration for future needs

Manpower planning - considering the flow of people in, through, around and out of the organisation

Individual level - people under-performing compared to expectations (knowledge attitude and skills)

Planning and Designing of Training

Having identified particular training needs of the organisation or individuals it is necessary to plan and design the appropriate training to fit the need/s identified.

This section discusses briefly plan and design, having already decided; why the training is needed, how it fits into the organisational goals and... who is going to pay. Moss (1991)

Planning

From the TNA it is possible to set objectives attainable by a 'training intervention' Consideration must then be given as to the type of training appropriate. A wide variety is available. Baumgarten (1995) though discussing training in relation to an international staff indicates a continuum of 'modelling process' or training interventions (see figure 8). They range, from fact-giving, to analytical, to experiential. She notes on the vertical axis the increasing training rigor, using the term rigour as within social learning theory, i.e. the trainee's degree of cognitive involvement.

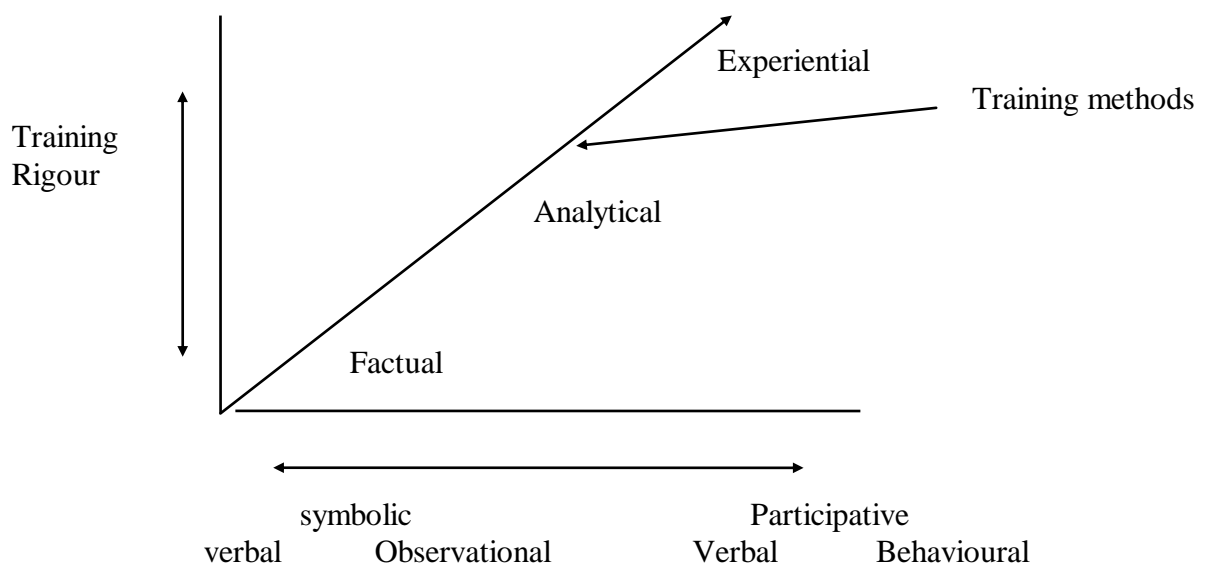


Figure 5 Training Interventions

In order to decide on the appropriate training strategy Reid et al (1992 pp269) suggest the use of the following decision criteria, recognising that. most decisions are a compromise between what is desirable and what is possible’.

- compatibility with objectives
- estimated likelihood of transfer of learning back to the work-place
- available resources (including time, money and staff)
- trainee related factors

These decision criteria as they relate to Outdoor Management Development are discussed in depth in the following section, particularly its compatibility with objectives and transfer of learning issues.

Implementation of Training

Framework For Analysis of OMD

Dainty & Lucas (1992) developed a framework with which to inform one’s approach in the use of the outdoors. They comment on the lack of research, and lack of critical reviews of this style of development. They suggest the framework “as a starting point from which to review or question the approach that is taken to OD” (see figure 9).

TIGHT T A S K LOOSE	NARROW SKILLS Quadrant 2	BROAD SKILLS Quadrant 3
	FUN/ENJOYMENT Quadrant 1	SELF & OTHER AWARENESS Quadrant 4
	LOW	HIGH

Figure 6 Intended Outcomes

Task

Tasks are described along a Loose-Tight continuum.

‘Loose’ tasks (e.g. the rescue exercise), are unstructured, with broad objectives and with little technical support and lie at one end of the continuum. Such tasks have great potential for developing managers, tasks where there is a wide choice open to delegates to achieve a particular objective. Longer and more complex tasks allow for the development of power struggles, miscommunication and drama, which in many respects resemble those found in the workplace making possible the metaphorical transfer of learning

Tightly structured tasks (e.g. abseiling) are those with narrow objectives, high technical support and are highly structured with little choice open to individuals as to how the task is achieved.

Tight tasks tend to have restricted learning outcomes and although they may be personally challenging, the skills learnt may suffer from a difficulty of transference to the workplace, particularly when coupled with low intensity review as seen in the model. (figure 9)

Pettigrew (1974) suggests that the most dramatic learning, that which informs future action comes from dramatic, spontaneous intense experiences. It is vital however that there are clear objectives in using such an approach. Such tasks alone are insufficient, it is the review process that provides the developmental aspect.

Review Process

Care must be exercised when using the term ‘process’ in that it is used to refer to two different aspects of management development. First there is the process/es by which delegates complete the task (elaborated below), indeed, it may be these processes (e.g. of communication, leadership) upon which whole courses may be focused.

The process referred to in the Dainty & Lucas (1992) model relates to the ‘facilitation’, ‘review’, ‘debrief’ or ‘wash- up’ session. This Review process continuum, describes a variation in intensity, where intensity means ‘the amount of pressure put on course participants to give and receive personal feedback concerning individual behaviour, to explore the feelings of others in the group and to take part in self-reflection and discussion’.

High intensity process would involve high interaction, challenge and directness.

Low intensity process implies minimal encouragement of personal feedback and where the issues drawn from the exercises remain general rather than specific to the individuals.

Dainty & Lucas (1992 pp116) “If there is any aspect of OD which demands high skills, can require considerable personal responsibility, and is the lynch pin around which a program potentially can provide high developmental experiences for its participants, it is processing.”

The Dainty & Lucas model illustrates the clear linkage between Task, Process and intended outcomes in figure 9 It emphasises the differences in outcomes obtainable from variations in the design of a course.

Outcomes

Fun/enjoyment which is self explanatory, but courses designed with this sole aim are lost opportunities for development. Spontaneous, unplanned development may occur. The more self aware and the better assessment made by an individual of his/her development needs, the greater the chance of development in this quadrant. Without ‘feedback’ on their actions either from results, or observations of others it is difficult to see how individual progress can be made.

Narrow concrete skills refers to specific skills which can be applied in more or less the same way to many situations e.g. listening skills, negotiating, coaching, such an outdoor example would be abseiling. The structure of the course should provide the feedback on progress. Tutors give encouragement and support, but these skills may be more cost effectively learnt in other environments.

Broad concrete skills have a range of possible approaches and are contingent by nature, e.g. leadership, team-building, coping with ambiguity and change. These are the skills largely considered by Dainty & Lucas (1992, pp111) as being “the more complex people management skills”.

Development of self and others awareness according to Dainty & Lucas the least straightforward outcome, potentially the most important and an aspect minimised by

executive developers. They argue that whilst a main focus of development is on the broad skills it is only by being 'self and others aware' that development in the other areas can be effective, and further argue that OD "provides one of the most powerful mediums for the development of self and other awareness" (pp112).

Bank (1994 pp25),elaborates on the benefits of Outdoor Development. These benefits may be located in the outcome sectors of the Dainty & Lucas Model. (see appendix 6)

Managerial Processes

Crawford (1988) views OMD in three dimensions of reality..

Task - what must be done

Process - How it is to be done

Environment - the context in which it is done

The model proposes that where reality on all 3 is high (such as on the job training), the learning will be primarily about the task. It suggests that;-

"it is only when the reality of both the task and environment are low that there will be significant process learning" (Crawford 1988. pp18)

most literature suggests that the processes concerned will be those related to management, team, and interpersonal issues.

Managerial Learning process

Having highlighted the potential of OMD to focus on managerial and organisational processes, there has been less emphasis on its ability to act as a metaphor of managerial learning process.

Jones (1993) identifies a variety of learning processes experienced by participants on OMD courses which correspond closely with the 14 learning skills identified by Mumford (1981). (see appendix 7), considered essential by Mumford for managers to learn from experience, adapt to change and continually improve their work performance.

This indicates that that OMD training may be an important tool for increasing delegates learning abilities (learning to learn)as well as being a 'vehicle' for imparting specific managerial process skills.

Task Classification Model

In analysing the suitability and design of tasks it is appropriate to consider the distinctions illustrated by the model below (Tuson 1994) (*figure 10*)

		METHOD OF OPERATING	
		KNOWN	UNKNOWN
O B J E C T I V E S	KNOWN	1	3
	UNKNOWN	2	4

Figure 7 Task objectives

Type 1 task consists of a task with a defined and definitive objective, and a clear, effective method of operating. These are common, uninteresting tasks and not usually utilised in outdoor learning

Type 2 Consists of situations where the method of operating is clearly defined but the objectives are not. Useful when looking at issues relating to setting and achieving goals, especially in a short task early in the program. There use is limited because a significant part of an outdoor program is the provision of a stimulating environment in which to learn

Type 3 Where the objective is clearly stated but the means of achieving it have to be devised by the group. These are likely to form the majority of the tasks in the program

Type 4 Sets problems where neither the objectives nor the method of achieving them are clear. (similar to the problems facing middle and senior managers). It is in courses focused on this level or tasks focused on creativity that they tend to appear

Kolb's learning cycle

Kolb's learning cycle (*figure 11*) (in Bank 1985: Tuson 1994.) is now widely used in some form by most Outdoor Development providers. It proposes that if events or 'concrete experiences' are remembered then they have the potential to be incorporated into a process of 'observations and reflections'.

There is an inherent assumption that we seldom learn from experience unless we have the opportunity to take time to reflect on an experience, & then assign our own meaning to it.

Observations made during this reflection allow the participant to form 'abstract concepts and generalisations' which in turn allows conscious consideration to be given to future similar events.

Subsequent 'testing' of the concepts and their implications are then made when the learner applies them to a new situation.

The 'new situation' is then treated as another learning opportunity (concrete experience) which invokes the continuation of the learning cycle.

It is the metaphorical links between the activities and processes highlighted in OMD and those of the workplace that allows transfer of learning from the OMD programme to the workplace. where the learning cycle can continue.

The Dainty & Lucas model described, links to the learning cycle of Kolb, where the task provides a 'concrete experience,' the facilitation process encourages 'observation and reflection', and 'abstract concepts and generalisations'. The facilitation of the latter of these two may sometimes be 'front loaded' and given as a theory lecturette prior to the concrete experience.

'Testing of the concepts' is provided normally by new opportunities during the program, though in some short courses this testing may be done back in the workplace, in which case post course follow-up by the facilitators becomes of even greater significance, to ensure the transfer of learning.

Transfer of learning is discussed in a later section.

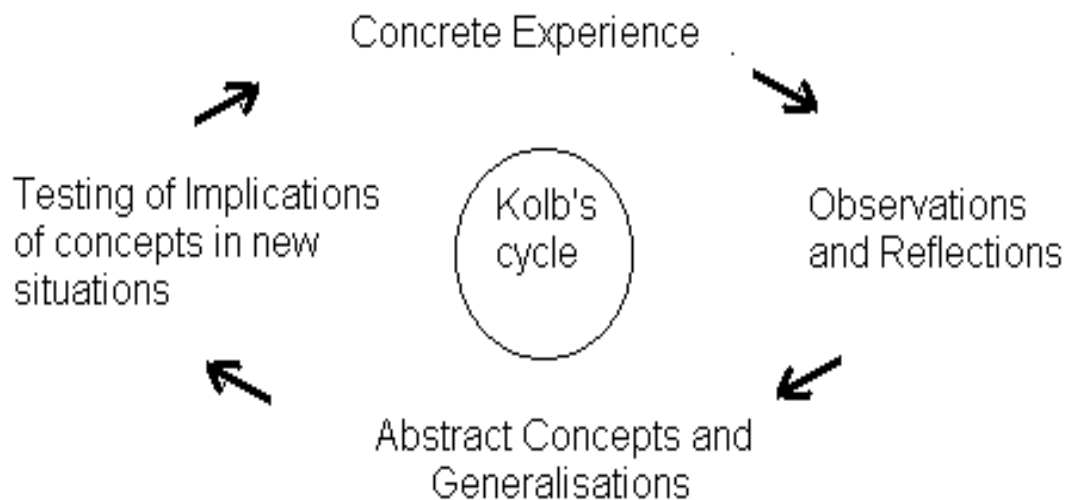


Figure 8 Kolbs Learning Cycle

Learning Styles

Learning style is one of the many factors affecting learning. It is emphasised as being particularly important to the trainer because it is something the trainer can directly influence. With such an awareness a trainer can accommodate learner preferences at an individual level. Individuals, once aware of their own learning style can develop their learning ability by consciously targeting the styles for which they have less preference.

A trainers own learning style often influences the style of course he/she has designed, and their facilitation of courses. It is necessary therefore that they reflect on their assumptions about their course programs.

Honey and Mumford (Honey 1993 pp103) identify learning styles, based on the work of Kolb.

Activist- what's new? I'm game for anything
 Reflector- I'd like time to think about this
 Theorist - How does this relate to that
 Pragmatist - How can I apply this in practice

KOLB LINK
 concrete experience
 observation and reflection
 concepts and generalisation
 testing in new situations

These learning styles tie in with the stages of the Kolb cycle. It is possible to develop ones learning ability to encompass all styles though generally a preference for a particular style will be retained.

Action Learning

L = P + Q where :-

L = learning;

P = Programmed Knowledge (facts and figures). Such programmed input in OMD is often less explicit though some courses include a specific theory input.

Q = Insightful questioning (domain of leaders wanting to drive a project forward), is very much the domain of the facilitator of OMD courses, encouraging such questioning, and linking to the learning.

‘Action learning’, some principles of which are easily applied to OMD, was summed up by Prof Revans (1980) as:-

“learning to learn by doing with and from others who are also learning to learn by doing”

This focuses not on the teachers knowledge but on the needs and experiences of the learners. It is not surprising then if a variety of training outcomes are reported from the same course as a result of individuals, each having used it to learn what was important to him/her.

This may explain the differences noted during research where the outcomes intended by providers and training managers were not always the same as those identified by delegates. Differences were noted between delegates learning on the same courses also.

Revans saw action learning as involving people working with real issues, in sets generally lasting for a period of months. The time and cost of such a work system has restricted its use in the UK. The use of the main principles of action learning in OMD rely heavily on the ability to relate back to the workplace by metaphorical transfer.

Cost saving in comparison to action learning when using OMD.

Jones (1993) suggests that participants on OMD courses attend with their differing learning needs, and further that, any learning autonomy obtained during the course can be isomorphically (of similarity of form) linked to the workplace.

Such learning process can occur indoors or outdoors. The benefits available in the outdoors are worthy of consideration as a method of improving existing management development programs

*“If **memorable and relevant experiences** form the basis of future actions then paradigm OMD activities appear to have the potential to provide the building blocks of managerial and organisational learning and behaviour”* (Jones 1993. pp215)

Traditional presentation of OMD activities as metaphors of managerial process therefore, may be only part, and that it may additionally act as metaphor for the managerial learning process

With regard to learning from experience Mumford (1988 pp14) comments that:-

“The reality [of managerial life] is that it tends in practice to be, hectic, disconnected and highly active, rather than reflective analytical and methodical. Most learning for most managers, most of the time occurs from doing the job, equally for most managers most of the time learning is rarely identified beforehand as an opportunity and only slightly more frequently identified afterwards as something that happened”

Hence it follows that *“Knowing we learn from experience we should be able to become more proactive and plan to learn methodically from experiences we are about to have”* Kolb (in Inglis 1994)

Levels of transfer of learning

In order to 'locate' metaphorical transfer as a learning medium it is appropriate to mention the three levels of transfer of learning identified by Gass (1991) OMD programmes can provide learning transfer in all three. The most important according to McGraw (1993) is the metaphorical transfer.

Specific transfer

Specific transfer; which occurs when skills are learned which can be directly transferred to another situation e.g. listening. Within the outdoor environment situations are designed such that issues such as listening skills become a vital factor in delegates success or failure in a task.

Non specific transfer

Non specific transfer; where the processes of learning are generalised into attitudes to be used in the future, e.g. patience

Metaphoric transfer

Metaphoric transfer; when processes in one learning situation serve as an analogy for learning in another, e.g. more risk taking approach to work following participation in events with a high 'perceived risk'.

For effective use of metaphorical transfer from an outdoor programme to the workplace in therapeutic situations McGraw (1993) identifies 4 elements that must be present.

The metaphor must be able to hold the participants attention, have a different, successful, ending to a real life situation and be isomorphic. It must also contain enough detail to enable the participants to attach personal meaning to the situation.

In order for these requirements to be satisfied it is necessary for courses to be individually designed and set in the appropriate context such that participants can make the links which allow transfer of learning. For this to happen it is imperative that the provider is fully aware of the training needs of the group, and also aware of the organisational dynamics of the client company.

This requirement was dispensed with in one subject company of my research. The Organisation training Manager detailed his exact requirements of course content to match his specific needs, the problem encountered as a result was inappropriate facilitation by the provider organisation due to their lack of awareness of the organisational dynamics involved.

Participant, Theoretical and Resource Reality

These views of reality of Kirk (1986) are a framework with which to review Outdoor Management Development. Consideration is given to each in terms of its effect on the design of outdoor learning events.

They also offer a means to assess whether management development objectives can be met by the tasks set in a particular outdoor program

Participant reality.

Kirk (1986 pp88) refers to participant reality as being "the extent to which the design and content of the learning event relates to the learners and their points of reference". This 'reality' or metaphorical link is essential, the absence of which, according to Kirk;- "can prevent learning within the event, or delegates may learn but fail to connect it to the work environment.". Kirk's comments add emphasis to the four elements noted by McGraw above.

In order to examine the concept of participant reality of OMD courses in more detail Kirk uses Stuart & Binsted's (1981) three dimensions. The dimensions used are 'content, process and environment'. These relate to the dimensions as used by Crawford (1988) and described below.

The Three Sub-divisions of Participant Reality

Crawford identifies 3 dimensions of reality of the training event as they relate to the individual participant. These are as sub-divisions to the participant reality of Kirk. It is the successful manipulation of these 3 dimensions of reality that is critical in determining what is learnt and what can subsequently be transferred to the work environment.

Task - what must be done Process - How the task is to be done

Environment- the context in which it is done

Theoretical Reality

This relates to the extent to which the design of a course takes account firstly of the relevant body of knowledge related to the management topic under consideration, e.g. the storming, forming, norming and performing of teams, and the Belbin team roles. A second consideration is the fit between event design and the theories on 'how managers learn' Kirk (1986)

Resource Reality

For OMD resource costs are high in terms of opportunity costs.

The Systematic evaluation of outdoor programmes is essential to ensure value for money, by examining what they achieve in relation to what they cost, then comparing that with the achievements of alternative methods and their cost.

Levelling/ neutralising claims made about metaphorical transfer

- A novel environment that most participants are not used to,
- No individual has any significant knowledge advantage over any other,
- Previous experience is unlikely to be at the level of 'expertise'.

Specific Transfer Problems of OMD

This section looks at the practical difficulties of transferring learning gained on such courses, back into practice in the workplace.

1. Adequate analysis.

The adequate analysis of future organisational needs in terms of management competencies, operational skills required by the organisation' and personal development needs of the staff.

McGraw (1993) considers there is a need to develop the OD facilitators role to include consultancy in organisational development in order to ensure a congruence between course and company such that the learning provided satisfies succession planning requirements of the organisation as well as individual development needs.

2. Congruence between organisation culture and development intervention.

Full consideration of organisational culture is needed when contemplating the use of OD. Systematic analysis, pre-program liaison between provider and client, and the involvement of senior management give such consideration.

Diagnosis of culture can be made, according to Dunford (in McGraw 1993) through an analysis by focus on themes, or analysis of elements (*see appendix 9*). Analysis can be made by combining both elements and themes. Sub cultures must also be considered.

Implementing cultural change, if that is the intention of the program, is notoriously difficult. There is considerable debate among organisational psychologists as to whether it is manageable at all. The objective/subjective debate.

McGraw (1993, pp72) considers that without consideration of these wider processes “OMD programs will probably provide manager development but not management development in its fullest sense.”

3. Active participation of top management in the intervention.

A comprehensive list of reasons for lack of managerial support is given in Garavan (1991). He considers it essential to secure top management support for training and development activities, for them to be fully effective.

4. Create an organisational desire for development.

There are numerous personal reason that can result in an unmotivated participant, they include; fear of the unknown, fear of failure, lack of self esteem.

McGraw (1993 pp56) feels that most can be overcome by ‘adequate pre-program briefing and a good program design and delivery’. A particularly good illustration of this was a pre course briefing by a provider company ‘changed the minds’ of three persons who, prior to the briefing were adamant they would not attend at all.

5. Skills developed must be relevant to workplace and be encountered by the delegate at work.

6. Positive support

Support for new skills (by appraisal, reward and feedback) in the workplace. The stereotypical differences between Organisational Development and Experiential Education (OMD) are described by Flor (1991). The main differences are, the long term nature of the OD process, the effect of OD on the organisation as a whole, and the emphasis of OD on changing organisational culture.

Levelling claims made about OMD

Terms such as levelling, neutralising are used to suggest that any prior knowledge or learning will not affect the performance of individuals on OMD courses, or provide any individual an advantage.

Jones (1993) suggests however that even a slight technical knowledge relevant to the task will give a delegate an advantage, thrusting them into the leadership role or distort the power balance. It may be that even a perceived knowledge can have this effect, causing the delegate to assume or be delegated to the role. .

Dainty & Lucas in contrast consider that it is by removing participants from the work environment that; they are then unable to ‘hide behind organisational and educational norms in an environment where they no longer exist’; their behaviour, and consequence of it is then visible for tutors and participants to observe, thus providing discussion points for the review (process) session.

It must be considered though, that as training via OMD is largely justified by its ability to bring about process learning then this inequality with regard to task may be considered as a minor criticism.

Participants on such courses will undoubtedly have considerable process knowledge differences by virtue of their past experience. If we accept that process skills learnt on OMD courses can be transferred to the workplace then it is hard to argue simultaneously that such transfer does not operate in the reverse.

These differences are taken to the OMD situation by delegates and therefore negate claims of ‘a level playing field.’ Boud et al (1993; 8) further negate the ‘level playing field’ argument;-

“Learning always relates, in one way or another, to what has gone before. There is never a clean slate on which to begin; unless new ideas and new experience link to previous experience, they exist as abstractions, isolated and without meaning.”

The popular belief that the high process reality, stressful environment and novel tasks of OMD can facilitate organisational change is further doubted. If existing behaviours, imported into the OMD program by metaphorical transfer are used by a participant and are perceived by them to be successful; then the OMD may actually serve to reinforce existing behaviours.

The issues highlighted in this section have a major impact of the effectiveness of the intervention. Earlier sections have indicated other factors of influence. Assessment of the effect overall is considered below.

Assessing the Effectiveness of Training

This section looks at the intricacies of the validation and evaluation of training, the different methods and depths of its measurement and some of the difficulties, particularly in relation to management training. It also looks at the use of such information obtained. Consideration is given to the meaning of effectiveness and the ways in which training effectiveness can be assessed.

Definitions

Evaluation

“The assessment of the total value of a training system, training course or program in social as well as financial terms. Evaluation attempts to assess the overall cost benefit of the course or programme and not to just measure the achievement of its laid down objectives.” (UK Dep’t of Employment Glossary of Training Terms)

Validation

“1. Internal Validation. A series of tests and assessments designed to ascertain whether a training program has achieved the behavioural objectives specified

2. External Validation. A series of tests and assessments designed to ascertain whether the behavioural objectives of an internally valid training program were realistically based on accurate initial identification of training needs in relation to the criteria of effectiveness adopted by the organisation.”

(UK Dep’t of Employment Glossary of Training Terms)

Information systems

“Information systems on training are vital but neglected. It is necessary to demonstrate to line management that the training department adopts a hard approach, and also to obtain information for control purposes” (Sloman 1994)

Such information is necessary for cost control, and to facilitate decision making by both line management and the training manager in respect of training initiatives and their justification in financial and results terms.

Perceptions of Effectiveness

Effectiveness can be considered at various levels, individual, organisational and at industry level. There are two broad approaches according to Ryan (1992), the universalistic and the contingency view. The first suggests that ‘certain characteristics or activities will lead to effective operation regardless of the circumstances’. The contingency approach, ‘suggests that characteristics or activities leading to effective operation are context specific.’

The assessment of effectiveness

essentially lies in 3 streams of thought,

Goal Based;-

very much assessed on the goals set by those with power in the organisation and not necessarily of maximum overall benefit to all stakeholders.

Systems based;-

which introduces the debate about whether, and to what extent does the organisation form part of a larger picture, recognising interdependence within a wider social system.

Multiple constituency;-

views are an extension of the systems approach, here it is considered that the organisation must to an extent “satisfy the criteria for effectiveness of those groups and individuals upon whom it primarily depends. (Ryan 1992)

The effectiveness issue relates to my research when making comparisons between organisations, whether as providers of, or purchasers of management development courses in that it is difficult to know whether you are comparing like with like.

“In accepting the political nature of effectiveness it can be seen that it depends on the values of the assessors”. (Ryan 1992)

Evaluation Frameworks

The most common evaluation framework used in the USA is by Kirkpatrick, and offers four levels of evaluation (Sloman 1994)

Reaction - how well did training participants like their program?

Learning - what knowledge (principles, facts, techniques) did participants gain from the program?

Behaviour - what positive changes in participants behaviour stemmed from the training program?

Results - what were the training programmes organisational effects in terms of reduced costs, improved quality of work, increased quantity of work and so forth

Evaluation can be undertaken at each of the levels, the most superficial, Reaction, being the easiest to measure. Results, are the hardest to accurately evaluate due to the difficulty of identifying and quantifying all other factors simultaneously affecting ‘results’

Evaluation methods

There are three main approaches to evaluation, though most commentators utilise a combination of all 3,

1. Measurement,

Key features of which are, integration, clear and unambiguous goals and testing before and after the event.

2. Intervention

Practical difficulties have led to more sophisticated methods of evaluation. There is an evident problem of demonstrating clear links between training objectives and organisational goals, particularly management training. (Sloman 1994).

This perspective regards evaluation as an important part of organisational intervention with the ability to deliver a variety of effects beyond the training goals

Easterby-Smith (1993) identifies four general purposes of evaluation;-

Proving- demonstrating conclusively that something has happened as a result of training and development activity

Improving- trying to ensure continuous improvement in training

Controlling- ensuring that trainers and courses are operated as intended

Learning- which treats evaluation as an integral part of the learning process itself

This approach tends to place greater emphasis on how the information is used, evaluation can assist in the learning process by reinforcing the training objectives (Sloman 1994)

3. Systems approach

Used to a large extent in the USA, (distinct from the systematic training model which treats evaluation as measurement)

Use is made of multiple data sources in order to obtain a more rounded view, providing the opportunity for developing wider support for the evaluation findings

Problems of Evaluation

Evaluating training, particularly management training poses problems, in part due to the variety in the management role. In contrast, for the operative with a repetitive task output is easily quantifiable, consequently increased output as a result of training relatively easy to measure.

Within management roles there is much more scope for an individual approach, there is no single correct way. Training is likely to consist of the consideration of alternative approaches, therefore evaluation can not rely on the observation of specific change in a managers behaviour. It is therefore much more difficult to accurately gauge.

The manager may be prevented from practising what was learnt by the 'Leadership and organisational climate (Warr et al 1970)

A manager is not in direct control of the out put of his department in that the performance of his subordinates is not directly controllable by him.

Conclusion

To ensure the matching of training and development to corporate strategy it is vital that the person/s making decisions as to appropriate training programs have an understanding of strategic issues, and a particular knowledge of their own corporate strategy.

In instances where there is representation of the personnel function at director level then communication of strategy to the training function should be in a way that its training implications are understood.

Where external training is utilised or contemplated it would be a distinct advantage if the providers had a good understanding of corporate strategy. This gives potential for the best link possible between strategy and course design. It also provides a consultancy aspect to the provider company which would be of particular benefit in the instances where the training managers have limited experience of corporate strategy.

Conclusion

Successful training should align with business strategy. I have already indicated that it should also align with corporate strategy. Business strategy should flow from corporate strategy and should also be aligned, frequently they are not.

It is essential that the differences and their causes are identified. It may be a failure in communications, a lack of understanding by business managers, or an emergent strategy caused by changes in other extraneous factors.

In addition to the necessary understanding of the different approaches to strategic management it is important that trainers take a proactive stance, representing personnel issues by indicating the training implications of strategic decisions, rather than reacting to those strategic decisions.

Training Needs Analysis

The pre-course assessment of individual needs by the provider ‘in confidence’ may produce a more accurate analysis by increasing the likelihood of honesty.

Use of questionnaires more sophisticated than those frequently used, to highlight needs that the individual himself is unaware of.

Conclusion

The needs analysis existing, particularly at the individual level meant that the systematic training cycle was able to be used. The eventual assessment of effectiveness however would be limited mainly to the individual performance.

Failing to identify accurately the cause or extent of any problem at the strategic level and job levels adds to the difficulty in measuring course effectiveness at the deeper levels of ‘behaviour and results’ as identified by Kirkpatrick (1967).

Provider companies should ideally be able to supply a consultancy service which includes strategic needs analysis, continuing down to the job and individual levels. This ability may then be utilised by OTM’s who simply do not have the time for detailed analysis but who recognise its importance and may be able to budget for its completion.

Plan and Design

The input required from the training was more than simply knowledge. An understanding of the processual issues underlying the objectives was also required.

The majority of delegates were managers and as such it was appropriate that their learning be participative with the opportunity to reflect and decide for themselves

OMD was considered to have distinct advantages over the more traditional methods, on the job training and planned organisational experiences. It allows active experimentation in a safe environment where learning by mistakes can be encouraged, without the cost of real mistakes to the business. It actively encourages learning beyond existing abilities and provides the opportunity to concentrate on the objectives, away from other issues in the workplace. It was considered that such courses could tackle ‘deeper issues’ (attitudes) affecting corporate culture.

Available resources

An element for concern was the time wasted in travelling to OMD venues, particularly for short courses. An advantage of yachts over land-based OMD courses is that they are mobile and readily available for charter around the country, also many companies have access to their own yachts e.g. through a company sailing club. Under such circumstances the providers and facilitators could travel to a local marina chosen by the company seeking training.

The absence from work of staff from the training department facilitating OMD courses is an additional expense and extraction from the regular training duties. This can be avoided by using a provider with facilitators experienced sufficiently to understand the strategic context of the training and to competently facilitate the transfer of learning required.

Trainee related factors

Some concern was expressed by all parties in relation to trainee related factors. Unless these are adequately addressed prior to a course it is probable that they will negatively affect the success of the course.

Most can be dealt with either by open discussion at pre-course briefings, or by course design. For example, those delegates who 'abhor active experimentation' may play little physical part in a task and extra time should be considered for the other parts of the Kolb cycle to compensate.

Poor standard of accommodation is perhaps one of the harder criticisms to resolve, particularly on yachts. Single 'rooms' if required aboard a yacht would limit a 45ft yacht to a course of about 6-8. Poor quality or inadequate quantity of food will also distract from efficient learning.

Of the people interviewed, all expressed seasickness as a concern, yet only one actually suffered personally, she said "I'm seasick, but I'd give it a try definitely."

Seasickness can be controlled to an extent; by keeping tasks under 3 hours in the early stages (most land-based tasks examined were less than this), and by sailing in sheltered waters such as the Solent.

Safety issues and insurance are of concern. The Royal Yachting Association in conjunction with the department of transport operate a code of practice. Compliance with this contributes to a relatively low insurance cost for training courses. (*see appendix 12*)

The close proximity of delegates aboard a yacht was expressed as both a positive and negative aspect. It was thought to be benefit in the formation of teams. It may also assist in self and other awareness, assisting to get to the underlying issues and also keep delegates 'in view' of the facilitator. A negative aspects may be when personality clashes need space. Individuals may also need space as a personal preference.

This can be controlled according to requirements, by providing 'ashore time' in the same way that delegates on any land-based course usually have relaxation periods.

Conclusion

Land-based OMD is widely accepted as being able to facilitate learning on a wide range of objectives, and is frequently used instead of the more traditional alternatives. The success of yachts as a medium for learning the experiential way will greatly depend on the design of tasks in relation to the learning objectives.

Trainee related issues such as seasickness, food, accommodation and safety are important issues and will affect the success of a course. Potential problems should be discussed pre-course and considered fully in course design.

Implementation of Training

The experience of training managers was instrumental in the decision to use OMD in the specific instances studied. In all instances the training manager considered the use of other learning mediums but decided that OMD was the most effective available to meet the objectives identified, in most instances a theory input was provided in an indoor setting.

Task/activities set

The style of implementation of training varied considerably between provider companies, in part due to the portfolio of tasks they possessed, and part due to the requirements of the customer organisation. For most, the 'tailoring of courses' meant simply selecting the most appropriate tasks from the portfolio. The portfolios having been accumulated over a period

of time and refined such that they now collectively cater for all the objectives targeted by OMD.

Due to the limited use of yachts in OMD, there is no established portfolio of tasks, they therefore need to be specifically designed for objectives set. This is a positive aspect, particularly as there are concerns that some land-based tasks are becoming 'old-hat'.

What was not witnessed in the structure of any of the courses was a linking of tasks to each other with a theme, towards an overall objective in the outdoor setting. This linking, even if done on land may fail to have the impact of a yacht-based course. On land most situations are contrived whereas on yachts this is not necessarily so. "The issues are real, the boat is real, and so are the rocks" (Cotton, 1996).

Total involvement in the task itself however can be counter productive in that the success or failure at a task is relevant, only in as far as it illustrates the effectiveness with which the processural issues have been applied. The ability of a facilitator to keep these processural issues 'in focus' is fundamental, as is the ability to relate back to the workplace.

Individual tasks on a yacht can be designed to link together, culminating in the efficient operation/direction/management of a yacht. (though sailing ability resultant from the course remains wholly a side issue). This design can be related metaphorically to an individual's actions and how they can ultimately affect the whole organisation, providing delegates with a greater sense of contribution to strategic issues.

The link to overall strategy provides an additional level to metaphorical transfer only available on yachts. If the absence of strategic needs analysis mentioned earlier can be remedied by consultancy, or by the development of more strategic awareness at the OTM level then there is potential for yachts to offer a new dimension in the focus and metaphorical transfer of OMD on strategic issues that is not possible on land-based courses. Isomorphic transfer at this level gives the opportunity of an additional point of reference for participants (see Kirk 1986), and an additional level to which participants can attach personal meaning McGraw (1993).

Conclusion

There is potential for yachts to offer a new dimension in the focus and metaphorical transfer of OMD on strategic issues that is not possible on land-based courses.

Task design has been a limitation on the use of yachts in the OMD role to date

Self and others awareness should generally be an initial element of OMD courses.

Facilitation Process

Questions asked of the providers and OTM's indicated that they considered the facilitation process to be vital to the effectiveness of OMD. Facilitators, on occasions found it necessary to interrupt a task to re-focus delegates on the processural issues. The ability to stop for a review instantly is vital, yet often impractical on a large traditional yacht, unless a full professional crew is provided (expensive). On a simply rigged (sloop) boat this is possible (by heaving to), and can be done in seconds. The choice of size and 'rig' of a yacht is therefore crucial in this respect.

"..the boat doesn't just stop because you think its time for a review" (Cotton 1996), in reference to a 70ft 'gaff rigged' yacht.

Task memorability is an advantage professed, and generally accepted of OD, yet the task is only the learning medium. Rarely mentioned explicitly and perhaps taken for granted is that by remembering the task, the process by which the task was undertaken will also be remembered. I am not convinced that this is automatically so, but feel that the facilitation of the course is crucial in ‘attaching’ learning to the memorable event.

It was clear however that some individuals lacked experience as facilitators and were qualified mainly for the outdoor pursuits aspect of their role.

This lack of experience could have serious implications for a course, greatly affecting the amount of learning transfer, particularly in tasks within Quadrants 3 and 4 of Dainty & Lucas’s model (1992), arguably the most important areas.

Conclusion

Facilitation is a crucial aspect of OMD courses. The ability of a facilitator to ‘attach’ the process learning to the memorable event is fundamental to the success of a course. The ability to adjust the facilitation style to suit individuals’ particular needs, and to match intensity of review to a particular desired course outcome are also vital.

It is also the facilitator who enables metaphorical transfer. It is their observations during tasks that provide the opportunity for discussion during task reviews.

Course Outcomes

The course outcomes, as described by Dainty & Lucas were evident in my research. The quadrants certainly do not seem to be mutually exclusive, but I consider them to be a reliable guide to advise the structuring of courses.

Kolb Learning cycle

The Kolb cycle was used extensively in all the courses researched. It is a well tested base for experiential learning. The outdoors exercises provide the opportunity for concrete experiences and the testing of concepts in new situations. What is essential is adequate input by facilitators in terms of theory and actual facilitation to complete the cycle.

A mini projector and screen in the ‘lounge area’ may be an appropriate tool to use, isolating sailing during the reflection stage.

learning styles

Most OTM’s and providers felt that the OMD courses could cope with all learning styles. If OMD can cope with all styles, and a variety of style preferences are represented on any course, then it can only be by facilitation that allowances are made for individuals on a course.

Action Learning

Within OMD it is the facilitation that encourages insightful questioning of issues highlighted in the task. Revans advocated action learning in relation to real issues, i.e. within the work setting. It is seen as a learning process. For the action learning approach to be utilised on an OMD course, clear use of metaphorical transfer must be made. If the link to work is not clear then the benefits are lost. OMD can be used as an excellent illustration of, as Revans (1980) stated of action learning “learning to learn by doing, with and from others who are also learning to learn by doing”.

The essential aspect is the facilitation. The principles of action learning in-part explain why delegates of OMD courses learn differentially, in that there is a focus on the individual needs.

Conclusion

With careful facilitation OMD can be the medium for learning to learn.

Transfer of Learning

Without the transfer of learning OMD would not really exist, i.e. there would be no management development. All that remained would be outdoor tasks, that could be fun, enjoyable. The fun element, while an essential element aiding in the memorability of OMD tasks, is only a small aspect of such courses.

The type of transfer required at any time depends on the objectives of the particular course. Coaching was one course objective where specific transfer was apparent. Its use was limited, it is likely that such learning is being done more cost-effectively using traditional venues.

Metaphorical transfer was identified by research as being the most important transfer method used in OMD, by providing participant reality. An isomorphic link between course/task design and the workplace is essential to enable facilitation to occur effectively. This is generally done by providers. What was not identified was tasks linked by a theme towards an ultimate aim that would be metaphorically transferable.

The final aim to sail a yacht could be so linked, by comparing aspects of sailing to management units, and the aim of those units was the direction/control of the yacht. This could provide the metaphorical link to the strategic direction of an organisation.

Those OTM's unconvinced of a providers ability, to transfer learning by facilitation from outdoor tasks back into the workplace are unlikely to use OMD.

Accepting that a course has provided the desired learning, research concurred with the theory, namely that top management support was quoted by delegates as being an encouragement to use course learning back at work. Lack of support caused disillusionment and prevented the use of skills learnt.

Conclusion

The OD facilitator should be able to provide a consultancy service to ensure a congruence between organisation culture and development intervention

Support of senior management and immediate manager is essential if learning is to be utilised back at work.

Levelling claims about OMD

Both OTMs and Providers expressed the commonly held view that OMD is a 'great leveller'. In relation to process knowledge, e.g. of management skills, delegates attend a course with varying degrees of such skills. Delegates abilities in relation to the tasks set may also vary. There is no practical way to determine how these skills and abilities are spread among delegates prior to a course. The differences may 'balance out' to provide a level playing field, they may not.

I prefer to consider that delegates arrive with different levels of expertise and different needs. It is essential therefore that sufficient needs analysis is done to ensure that those on the course are able to benefit from it.

I further consider that delegates are able to learn differentially through the Kolb cycle and the principles of action learning.

The real danger of a course reinforcing existing behaviours that are contrary to organisational needs can only be addressed by the design and facilitation of the course focused attention on explicit organisational needs. The lack of identification of strategic training needs evident pre-course *creates a difficulty in this area.*

Conclusion

Lack of strategic training needs analysis may provide insufficient course direction to prevent courses reinforcing inappropriate needs.

Assessing the Effectiveness of training

Research showed that effectiveness assessment was being done by some providers and OTM's. The results were not made available. What was evident was OTM's commitment to this type of training as an effective means to tackling the objective being researched.

Belief in OMD's ability to deliver effective learning seemed grounded in reports from managers at occupation/job level, and delegates views.

By emphasising anonymity in my questionnaires I hoped to get honest answers from delegates about courses. It seems unlikely that strong criticism of a course would be given to an OTM, and instigator of a course. They might consider that such criticism would reduce their chances of another course

OTM's may have been reluctant to admit that objectives set for the course had not been achieved. This would have been an admission of a mistake. The results obtained from delegates however did support the OTM's assertion that the courses were successful.

The answers given by delegates indicated that an effect at the 'job behaviour level (Kirkpatrick 1967) was noticeable. A short time lapse between courses and research was one factor why no measure of effect at deeper levels was observable, or attributable to the courses. OMD courses are a relatively small intervention considering all the other issues that affect the deeper levels of evaluation.

Delegates considered that the outdoor tasks made the theory more memorable than if they had received that theory input in a traditional manner. This is the only comparative data between OMD and conventional methods obtained. It cannot be relied upon as anything more than an indication that OMD may be the more effective but takes no account of cost-benefit analysis. Subject to what has been mentioned previously with regard to task design, yachts potentially are as effective, as land-based courses.

Conclusion

In order to assess the effectiveness of the training it is necessary to identify a start point in terms of delegates skills. These skills should be considered in the light of strategic, job and individual needs. Criteria should be decided, against which the delegates post-course ability should be measured.

RECOMMENDATIONS

These recommendations follow on from the conclusions developed in the previous section.

Strategy-HRD connection

To ensure the matching of training and development to corporate strategy it is vital that the person/s making decisions as to appropriate training programs have an understanding of strategic issues. Where there is representation of the personnel function at director level then communication of strategy to the training function should be in a way that its training implications are understood.

I would therefore recommend that time is allotted each month for the discussion of strategic issues between the director responsible for training and training managers. Training managers should also receive training in strategic HRD issues, such as;-

Strategic Analysis

- the environment
- culture and stakeholder expectations
- resource and strategic capability

Strategic Choice

- identifying strategic options
- evaluating options
- selecting strategy

Strategy Implementation

- managing strategic change
- organising structure and design
- planning and allocating resources

(Johnson & Scholes 1989)

Other initiatives for the training manager to achieve this strategic linking should be considered. These may include, the development of strategic alliances both internally and externally in the development field, defining a power base for the training function, heightening awareness of their availability as a resource, and as an information expert. The development of a support network both within the organisation and externally will assist, as will the development of a comprehensive evaluation framework for the training activities.

Successes in training matters should be communicated to the organisation and its directors. This issue can be developed as a marketing skill internally or externally as marketing of the training function. In so doing it is necessary to understand the organisations politics.

Where external training is utilised or contemplated it would be a distinct advantage if the providers had a good understanding of corporate strategy. This gives potential for the best link possible between strategy and course design.

I would recommend that providers develop an understanding of corporate strategy within their organisation, to be able to advise training managers and provide a link between corporate strategy and training objectives

Training-Business strategy link

In addition to the necessary understanding of the different approaches to strategic management it is important that trainers take a proactive stance.

I would recommend that training managers should cultivate relationships with department managers and other agencies, providing a service to them by assisting them in the

identification of business training needs. In this way it will be possible to identify a range of stakeholders that can be satisfied. It is essential that the training manager is aware of the organisation's business goals.

Providers where possible should liaise with departmental managers and delegates to obtain a full understanding of the environment in which the delegates operate. This will assist in the matching of course programmes to business needs.

Training Needs Analysis

The needs analysis existing, was almost exclusively at the individual level. This meant that the systematic training cycle was able to be used. The eventual assessment of effectiveness however would be limited mainly to the individual performance.

My recommendations resulting from this are, that training managers, in conjunction with business managers should establish a procedure to identify job and strategic needs. **Management competencies should be identified as a method of assessing needs. Such identification will provide potential for management development rather than the mainly manager development existing at present.**

Provider companies should develop the ability to supply a consultancy service at all levels of needs analysis.

Plan and design of training

Land-based OMD is widely accepted as being able to facilitate learning on a wide range of objectives, particularly 'soft skills' and is frequently used instead of the more traditional alternatives. The success of yachts as a medium for experiential learning will greatly depend on the design of tasks in relation to the learning objectives.

I would recommend as imperative that facilitators should understand strategic, job and individual issues relevant to a particular training intervention such that they are able to relate processural issues highlighted in the tasks, by review, back to the work-place.

Facilitators should be further provided with a clear theoretical awareness of each objective of OMD and with the skills to review tasks using varying intensity appropriate to the objectives set and the needs of the delegates present.

I recommend that land-based providers develop an ability in task design such that they are capable of matching business scenarios to allow metaphorical transfer. This ability will also prevent tasks offered to customers from becoming 'old hat'.

The combining of in-depth knowledge of the sailing environment, a full understanding of the objectives targeted by OD and their relevance to strategic, job and individual needs is recommended. From this combination, innovation in yacht-based task design should be developed.

I recommend the exploration of task design on yachts; identifying a range and classifying according to quadrants identified by Dainty & Lucas (1992) and Tuson(1994).

Trainee related issues such as seasickness, food, accommodation and safety are important and will affect the success of a course. The effects of seasickness can be minimised by keeping tasks in the early stages of a course to within 4 hours. Operating in sheltered waters will further reduce the effects. Food and accommodation arrangements can be varied by altering the type/size of yacht and crew used for any particular course depending of the objectives of it.

The use/availability of shore based facilities such as class-room, dining and accommodation should also be considered by a provider such that the broadest degree of flexibility will increase their ability to satisfy training managers requirements.

Safety is of paramount importance. Sailing is considered to be extremely safe with more people drowning in cars in the UK each year than drown in yachting related incidents.

Courses should be run on yachts of the RYA standard of 'sail training vessel'. Crew should be of at least 'commercial Yachtmaster', the standard required by the RYA of instructors in recognised schools, for the teaching of the first two sailing qualifications.

Courses should be operated to the safety rules and standards required on RYA courses

I suggest that potential problems should be discussed at pre-course meetings with the delegates. Sailing courses involving hours or days at sea are unnecessary and should be avoided unless specifically requested by a customer company.

Implementation of training

- Training managers should seek to enlist the help and support of senior managers in the use of OMD programs.
- Immediate managers of delegates should also be involved, by pre and post course assessments, and with briefing and de-briefing of the delegates
- Training managers should attend a pre-course meeting 2-3 weeks prior to a course with delegates and provider to discuss any issues raised by delegates, dealing with preconceptions, fears held, and administrative matters.
- Post course meetings should be held as a follow up to the course in order to assist delegates consolidate on the course learning and continue with their self-development.
- Senior managers should be invited to post course meetings and/or attend the final day of the course to show support for it.
- The OD facilitator should be able to provide a consultancy service to ensure a congruence between organisation culture and development intervention

The implementation of these recommendations will require additional resources in terms of extraction's from the workplace, additional charges by some providers, and the cost of facilities in which to hold the meetings suggested.

Assessing the effectiveness of training

- To assess the effectiveness of the training it is necessary to identify a start point in terms of delegates skills. Criteria should be decided, against which the delegates' increased ability should be measured.
- Post-course effectiveness should be assessed at all levels by the use of interviews or questionnaires at 1, 3 and 6 month intervals.
- It is necessary that providers develop the ability to supply a consultancy service in this, and other aspects mentioned earlier in my recommendations, as frequently training managers had no time to undertake such tasks.

Appendix 5 Organisation Culture & Management Style

Organisational Culture and associated management styles.

Reid et al (1992).

The Power-based culture

Training plans are likely to reflect attempts by those in power to improve the performance of those who are not.

The People-based culture (consensus is prized)

Training will often reflect individual requests, including transfers, attachments, etc.

The Role-based culture (is bureaucratic)

Training systems dominated by written documents, standard courses for specific groups

The task-based culture

Training emphasis on the current work goals. Much group/team work toward common task, so training often determined on a group basis.

The Quality-based culture

Training becomes part of the system, 'quality education courses'. Quality improvement teams (often with the aid of a consultant) devise new techniques.

Appendix 6 Benefits of OMD

Bank (1994, pp25) suggests the following benefits of OMD.

insight skills,

team-building,

development of communication skills. He also lists the following;

self development through personal audit

attitudinal change in the assessment of self and others

an antidote or cure for burn out

an experience in team-building

development of leadership

a living workshop on communication skills

an experience of dealing with change and uncertainty

Appendix 7 Learning Skills

The 14 learning skills identified by Mumford;-

The ability to;-

establish effectiveness criteria for oneself

measure ones own effectiveness

identify ones own learning needs

plan ones own learning

take advantage of learning opportunities

review ones learning process

listen to others

accept help

face unwelcome information

take risks and tolerate anxieties

know oneself

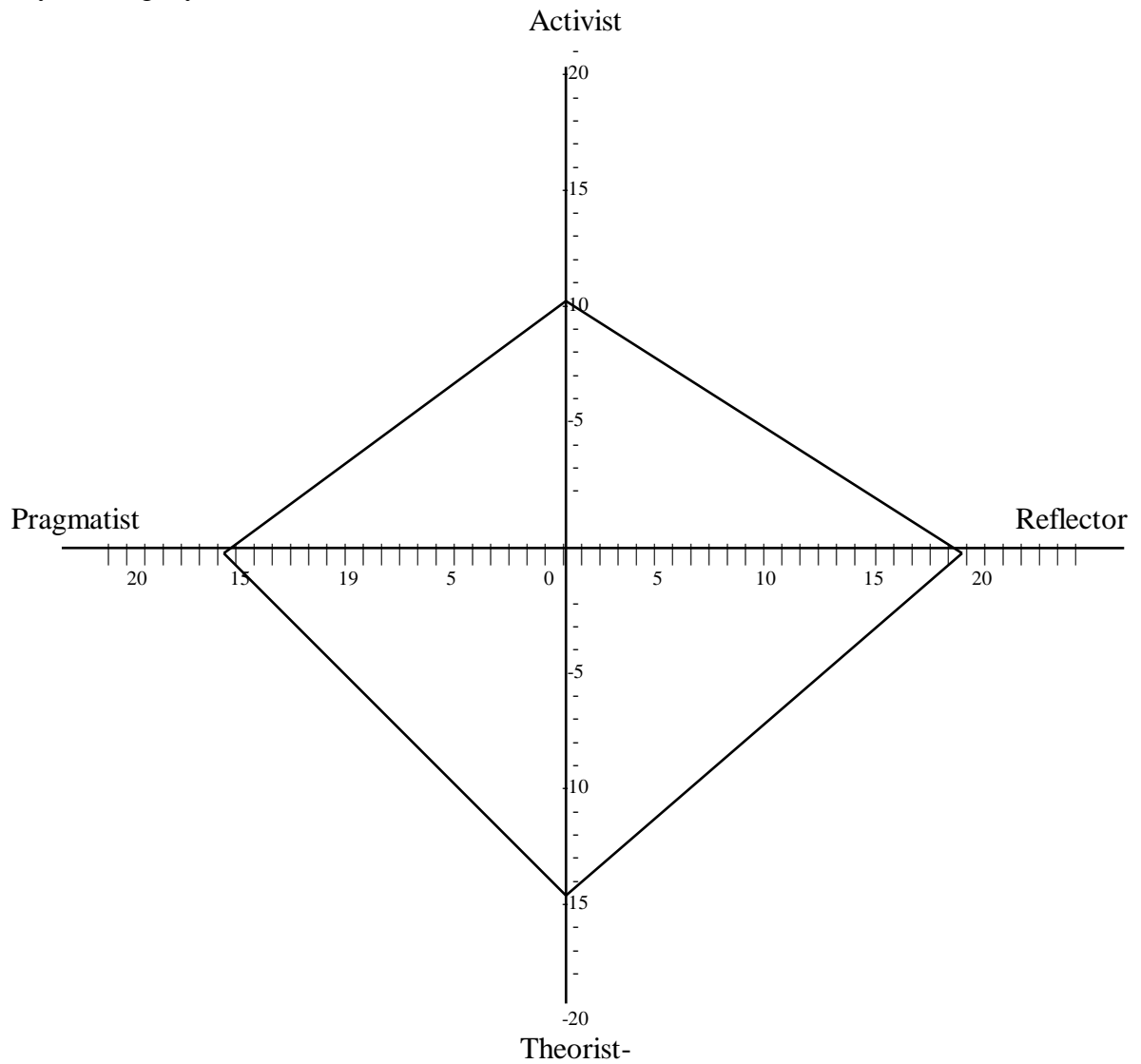
analyse what other successful performers do

share information with others

review what has been learned

Appendix 8 Learning Style of Researcher

My learning styles



ACTIVIST	10
REFLECTOR	18
THEORIST	15
PRAGMATIST	16

Appendix 9 Culture Diagnosis

Diagnosis of culture;-

A Focus on themes

degree of autonomy given to employees
degree to which productivity is encouraged
whether conflict is suppressed, or dealt with openly
degree to which information is shared or withheld
whether organisation' is customer driven
extent of hierarchical organisational practices
whether innovation is rewarded
whether criticism or the organisation is encouraged or discouraged
level of employee participation in decision making
whether team work is encouraged, rewarded or emphasis on individual action
whether long term thinking is encouraged

Analysis by focus on elements, such as;

language,
stories,
behavioural norms,
managerial practices,
physical layout,
organisational beliefs.

Appendix 13 Yachting tasks used by the M P

Yachting tasks used by one provider

Task 1

Tie a Reef Knot Time 20 mins

Team split in two, both halves are at either end of a long rope. They are joined to the rope by their wrists. Discussion of how to complete the task must cease before they begin their attempt. The reef knot must be tied in the rope section between the teams.

Task 2

Put up the main-sail Time 20 mins

Leader appointed.

Task 3

Find the depth of the boat keel Time 30 mins
equipment;

1 piece of rope, 1 buoyancy aid, pencil and paper. (the yacht is 35' long)

Task 4

Find height of mast
equipment;

pencil, paper, ruler.

Task 5

Man over-board

Task 6

Navigation exercise Time 1 hour

A to C via B in the shortest possible distance 'over the ground'

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