



HR-RELATED SKILL DEVELOPMENT

Learning intervention programme

HRD is an important HRM function in terms of both implementing organizational strategy and facilitating organizational effectiveness. After learning needs have been determined and learning objectives set, formal learning programmes must be designed. Designing a formal learning session or workshop involves a number of critical activities and decisions, including those related to content, learning methods, materials and equipment, and site. A work-based learning intervention programme presents an overview of the training activity the manager or HR specialist is proposing to do. It should tell the reader why the training intervention is necessary, what costs are involved, and how it will benefit the organization. In essence, the proposal underscores the whole notion of accountability in HRM. Many managers lack the basic knowledge and skills to craft such a proposal.

The following guide and case study 'Petrotechnology Incorporated' is designed to help you develop proposal-writing skills and demonstrate your understanding of the concept ROI.

Learning Intervention Programme proposals

What is a proposal?

A proposal is a document used to present an idea or project to potential investors. The purpose of a proposal is to convince an organization, government agency, or other institution, that an investment of money should be made in your project.

There are different types of proposals:

- Research grant - Investigation of a theory or an idea that might be of practical use or add to existing body of knowledge.
- Feasibility study – An evaluation of how one or more alternative approaches can solve a problem.
- Internal Organization proposal – Employee proposal that may deal with suggested improvements in management or processes.
- Learning services proposal – Investigation of learning needs and learning intervention proposal that will be of benefit to people.

What makes an effective learning intervention proposal?

- A clear statement of learning needs and a discussion of the background to the events that generate learning needs.
- An explanation of why learning needs analysis and intervention will add value to the investor.
- A clear description of the learning processes.
- A schedule, the estimated cost of the project and justification for the cost, a plan, and resources required.
- Presenting the facts you wish to communicate in professional format and persuasively.
- Convincing an expert reviewer that you know what you are talking about.

What are the steps to writing a proposal?

We can identify seven steps to writing a proposal:

- Search for sources
- Develop a strategy for analyzing learning needs
- Gather the information
- Analyze the information
- Write draft proposal
- Revise, proofread, and edit
- Write final copy

What goes into a proposal?

A major project typically includes the following key elements:

Letter of transmittal

Short letter of transmittal written by you to your client to introduce yourself, establish your credentials for the project, and highlight special features you wish to emphasize. Also, if appropriate, offer to meet to discuss the proposal.

Title page

This usually contains the following information: Title, Submitted by (name, position, organization), Submitted to (name, position, organization) and Date

Table of contents

Typically one page, avoiding too many sub-headings, and ensuring headings and any diagrams correspond to page numbers.

Summary or abstract

This is the last section to be written and is the section most frequently read. It is approximately one page in length and includes the following: statement of learning project; learning objectives; anticipated outcomes and benefits; and your qualifications to achieve the objectives. A successful summary will arouse the reader's interest and make him/her want to know more about the project.

Introduction

Provide background information on the project and yourself. It contains a statement on purpose, key stakeholders, and scope of the learning intervention and of your accomplishments in HRD. It also includes a brief history about your organization. It prepares the reader for the sections of the proposal dealing with the specific project.

Statement of events that generate learning needs

Describe your understanding of the events that have generated learning needs (planned or unplanned events). It should include a statement of how learning intervention is aligned with the strategic goals of the organization, and a statement of how learning intervention meets external and internal consistency. If applicable, the statements should be supported with statistical data, support documentation by organizational members, obtained through your analysis of learning needs. Cite experts to corroborate your assertions.

Learning objectives

List primary learning objectives, secondary learning objectives and any assumptions.

Statement of the benefits of learning

Statement of net benefits of learning intervention. Avoid exaggerating net benefit or value added.

Quantify net benefit:

1. What unit(s) of measure (for example, accidents, customer complaints, and market share) will be used to describe the performance as a result of learning?
2. What is the dollar value that will be assigned to each unit of measure?
3. Calculate Net Performance Value

Methodology

A description of exactly how you will achieve the primary and secondary learning objectives within the stipulated time frame for the project. Include learning processes, the rationale for the approaches taken, and quantitative (if applicable) projections of learning outcomes to be achieved. Identify resource requirements: for example, computer notebook, projector, VCR, cameras etc. Description of provisions for program evaluation with a rationale for choice: reaction, learning, behaviour or results? A statement of any assumptions and any ethical considerations.

Project time schedule

Show when each learning session will start and end. Show start and finish of major learning activities for example, negotiating simulation. The schedule is used to monitor learning process and to assure the completion of learning objectives. Use a chart or 'milestones' table for better organization of the information.

Project team

Identities, education, experience, and qualifications of the personnel involved in carrying out the learning intervention. This section may involve submitting each facilitator's resume.

Project budget

Are there any building, equipment, and administration costs? Are there any learning needs analysis costs? Are there any program development costs? What are the program delivery & evaluation costs? Calculate the total direct costs of the learning service?

Do the learners have to be replaced while attending training program? Will the learners have to work overtime to compensate lost production? Will program initially increase spoilage costs as employees learn new skills? Calculate the total indirect costs? Are total costs in alignment with time and quality expectations?

Alternative funding (if applicable)

Used if a project's budget will be supplied from several sources. Shows firm commitment for funding from other sources such as: Matching funds from other departments in the organization or government agencies. Obtain solid agreements from other sources for their share of the funding.

Appendices

Contains trainers/facilitator's resume. Data results from learning needs analysis. Evaluation instrument. Summaries of successful projects previously completed and letters of support and recommendations.

References

Care should be taken with this section because it demonstrates the thoroughness of your research and your grasp of the management background needed for the learning program. It also shows the special preparations and expertise you or your organization brings to the project, and identifies noteworthy sources behind your statement of the challenges, learning objectives, and planned learning intervention.

Student assignment: Developing a Learning Intervention proposal

Learning objectives

The purpose of this activity is to give you the opportunity to apply strategic management and cost/benefit concepts to developing a HR intervention proposal, and to improve your proposal writing skills.

The assignment

Based on information in the text, the case, and the above guide,¹ write a learning services proposal for Petrotechnology Inc. The proposal should include: learning objectives, benefits and costs of the learning intervention, and other items you feel necessary.

Background to case: Petrotechnology Inc.

Petrotechnology Inc. is engaged in the design, manufacture, and marketing of specialized components used at the well-head in drilling for the production of natural gas and oil, both onshore and offshore. The company employs 308 people.

In the production department, 195 machinists manufacture 3120 precision components each week. The data in the Manufacturing Information System (MIS) show a 5 percent scrap rate. The production manager checked the calibrations of the machine tools. Satisfied that nothing is wrong with the machines, she considered improving performance by reorganizing the machine shop in work teams.

A meeting of her three shift supervisors set out the following performance criteria:

- Machining (programming the machine, machining and drilling) with no more than 2 percent scrap rate per week.
- Heat treatment of machined component with 0 percent error rate acceptable.
- Secure packaging of components (no marks on polished metal) with 0 percent rate acceptable.

The production manager and the three supervisors (the task team) calculated that each rejected component cost:

\$60.00 wasted high-grade steel
\$70.00 labour to machine and heat-treat component
\$100.00 to send replacement order by courier
\$5.00 phone/fax charge
\$20.00 to pack replacement
\$10.00 restocking in inventory
\$265.00 total cost of each rejected component.

The production manager wanted to add in the large amount for lost goodwill, but the CEO vetoed the idea, telling her to stick with the hard facts.

¹ See also Exhibit 1 (below) for further advice on designing Learning Intervention Programmes

The production manager contacted an engineering consulting company specializing in work team systems. The senior consultant estimated that a five-day specialized training program and two weekend sessions would be needed to complete the transition to a team-based system successfully. Prior to the training program, an analysis of learning needs would be conducted; estimated time five days.

The consultant provided the following additional information related to this proposal:

- The average consulting rate in this industry is \$180.00 per contact hour for the training.
- Additional cost would include \$100 per trainee for printed materials.
- Employees in this industry expect their employers to pay for their technology-related training.
- The industry is very competitive. It is not uncommon for companies to recruit away key employees from other companies.
- The average mark-up on production costs is 40 percent.
- The average annual employment costs per machinist are \$65 000.
- Working weekend employees in this industry are paid time-and-a-half (that is, 1.5 times their regular wage).
- Productivity of the production department on average is expected to increase by 10 percent as a result of team-based working.
- It is expected that training would take place off site, in ten cohorts, over one five day week and two consecutive weekends. A local hotel has suitable seminar rooms at \$50.00 per day, plus \$15.00 per trainee for morning and afternoon drinks and lunch per day.

Task

How would you determine the learning needs of the machinists?

Assuming that the objective of no more than 2 percent scrap rate is reached, provide a quantification of the return on investment for this proposed programme of learning. (You may make any assumption you wish providing they are realistic).

Prepare a written learning services proposal.

Exhibit 1 'Guide for planning training programmes'

This guide is based upon the work of Rosemary Caffarella, *Planning Programs for Adult Learners*, (Second Edition), (2002) San Francisco, CA: Jossey-Bass, p. 23

- **Discern the organizational context**
Be knowledgeable and sensitive about the organization, the people and wider internal contextual factors. Know about the business strategy, the HR strategy and the power dynamics in the organization and departments. Build a coalition of support from key stakeholders for the training programme.
- **Identify learning needs**
Decide what sources to use in identifying learning needs for training programme.
- **Develop learning outcomes**
Write programme learning outcomes that reflect what participants will learn and the resulting outcomes from that learning. Ensure that both measurable and non-measurable programme outcomes are included.
- **Designing facilitating plans**
 - Develop unambiguous learning outcomes for each teaching session and ensure they are aligned with the proposed learning outcomes for the programme.
 - Select teaching techniques that match the focus of the proposed learning outcomes that the trainer/manager is capable of using, and that take into account the experiences of the participants and the learning context. Be knowledgeable about the factors that influence transfer of learning.
- **Formulate evaluation plan**
Develop systematic programme evaluation procedure and instruments (for example participants' questionnaire). Determine how evaluation data is to be collected.
- **Select venue, staff needs and schedule**
Choose the most appropriate venue. Identify trainer/facilitator requirements. Devise a programme schedule. Determine whether own HR facilitators and/or whether external consultants are required. If latter, discuss programme learning outcomes with external consultant and/or involvement in the development of the programme. Determine equipment required for example video, computers and so on.
- **Prepare proposal**
Estimate the direct and indirect costs of the programme.
- **Prepare learning material**
Select and prepare learning materials for the programme.
- **Coordinate facilities and in-class events**
Oversee on-site programme arrangement, including facilities to meet disability requirements and refreshments. Be sure to create a positive climate for learning from the moment the participants arrive.

- Gather evaluation data
Gather data for learning intervention programme. Thank facilitators/consultants and participants for their contribution to the event.