Managing the Training and Development Function

Purpose

Training and development is potentially a powerful strategic function. It can make a major contribution to organisational, group and individual effectiveness, efficiency, growth and success. It is important that other functional managers accept the training and development specialist as a business partner, whether operations are co-ordinated as a centralised specialist function or are controlled by line managers.

This managerial-level Standard is relevant for those with overall responsibility for the whole range of formal and informal training and development activities within a business, delivering solutions to meet organisational needs. The Standard is appropriate to the functional head of training and development or equivalent, either in an organisation where training is a support function or in one providing specialist training and development services to a range of clients. It applies to:

- a specialist who sees the management of training and development as a career route
- a manager for whom a period managing training and development activities is part of a career path
- a senior practitioner operating as a consultant in a training organisation.

This Standard reflects changing work roles and organisational structures and the context where some responsibility for training and development is devolved to line managers. It emphasises the need to tailor training and development activities to organisational objectives and business needs and includes reference to managing the development of non-employees and outsourced and subcontracted work.

To be effective, the specialist professional manager of training and development operations must be able to establish, manage and evaluate a cost-effective, value-adding function appropriate to the needs of a particular organisation. She/he must ensure a good ‘fit’ between the vision and strategy of training and development and organisational vision and goals. This ‘fit’ is more important than any form of idealised ‘best practice’.

The Standard incorporates many requirements of the NVQ/SVQ Level 4 in Learning and Development and some of the level 5 requirements. It also covers the management of relevant, efficient and cost-effective policies and practices for vocational education and training. To be fully effective, the functional manager in this area probably also needs to meet the Standard in Managing Organisational Learning and Knowledge.

No personnel or development activity exists in a vacuum. So it is inevitable that this Standard reinforces and confirms some of the issues that also appear in the People Management and Development Standard, and the Generalist Learning and Development Standard. Because of its management focus it also relates to some content in the Core Management Standards.
Performance indicators

1 The contribution of training and development to the business

Operational indicators
Practitioners must be able to:
1 Manage training and development operations in order to make a contribution to the achievement of an organisation’s strategic goals.

Knowledge indicators
Practitioners must be able to understand, explain and critically evaluate:
1 The links between training and development and the business and the integration of training and development with broader human resources policy and practice.
2 Strategies that contribute to organisational effectiveness.

Indicative content
1 Political and legal, economic, sociological and environmental and technological factors affecting organisations.
2 Current national and EU initiatives and standards affecting training policy and qualifications.
3 Current challenges facing organisations: changes likely to have training and development implications.
4 Aligning training and development with business goals and needs at corporate, unit and specialist/operational level. Vertical and horizontal integration of training and development within organisations.
5 Using training and development strategically as a source of sustainable competitive advantage.
6 Relationships between training and development and human resource policies, strategies and practices such as appraisal, performance management, career management etc.

2 The training and development function

Operational indicators
Practitioners must be able to:
1 Plan, establish, manage and improve a training and development function appropriate to organisational context, practices and priorities.

Knowledge indicators
Practitioners must be able to understand, explain and critically evaluate:
1 The structure and roles of training and development in a variety of organisations and factors to consider when deciding role and structure.
2 Processes appropriate to the implementation and monitoring of policy strategy and plans in a variety of organisations.

Indicative content
1 Organisational structures and cultures.
2 Structures and roles for training and development in a variety of organisations (eg the specialist function, the line management-led function, the function as a profit centre, the outsourced function etc). Factors to consider in deciding the role, structure and priorities for a training and development function.
3 The systematic approach to managing training and development through the training cycle.
4 Processes needed for the effective management of training and development, including project management. Processes involved in providing advice, support and consultancy.
5 Positioning the training and development function in an organisation (eg reporting lines, connections, power and influence).
3 The identification of organisational training and development requirements

Operational indicators
Practitioners must be able to:

1 Identify and prioritise current and future organisational training and development requirements.

Knowledge indicators
Practitioners must be able to understand, explain and critically evaluate:

1 Strategies, methods and techniques for establishing training needs within an organisation and for non-employees – including the documents and other sources of information likely to indicate training/learning needs.
2 The distinction between issues and needs that can be addressed by training and other non-training issues, and how they may be recognised.

Indicative content
1 The value of needs analysis to organisations and when it may be necessary. The importance of performance standards as a basis for identification of needs (and evaluation). Sources of information (eg performance data, business plans and objectives, appraisal records).
2 Processes for co-ordinating and prioritising needs. Methods for establishing needs, at organisational, departmental or functional and individual levels.
3 Responsibilities for identifying training and development needs. Recognising the difference between needs, problems and opportunities that lend themselves to a training solution and those that require other management action.
4 The role of the training and development functional head in collaboration with line managers in the setting and evaluation of performance standards.

4 Policy and strategy issues

Operational indicators
Practitioners must be able to:

1 Develop policy and strategy on training and development issues, including those relating to externally recognised qualifications and mandatory training.

Knowledge indicators
Practitioners must be able to understand, explain and critically evaluate:

1 The purpose and likely content of a written training policy and alternative ways to establish and communicate policy.
2 A range of training and development strategies and the conditions under which they may be appropriate, including:
   • technology-based strategies
   • the nature and impact of initiatives by external bodies in vocational education and training, including the details and relevance of nationally and EU-recognised qualifications and standards.

Indicative content
1 The advantages and disadvantages of a written training policy.
2 The purposes and likely contents of written policies. Why policies are not always effective. Alternative ways to communicate policy (eg service-level agreements, contracts, procedures).
3 Choices in the provision of vocational education and training.
4 Strategies for implementing policy (including outsourcing, internal and external, formal versus informal, technological versus traditional delivery).
5 The management of financial resources

Operational indicators
Practitioners must be able to:

1. Negotiate and manage the training and development function’s financial base effectively and efficiently, whether as a cost, profit or outsourced centre.

Knowledge indicators
Practitioners must be able to understand, explain and critically evaluate:

1. Factors (financial and non-financial) in establishing and managing the budget and:
   - the advantages and disadvantages of centralised and decentralised budgets
   - the concepts of value-added and cost/benefit analysis
   - external sources of funding.

Indicative content
1. Managing cost centres and profit centres.
2. Sources of external funding and how to access them.
3. Costing training and development programmes. Traditional and alternative methods of budgeting (zero-based, project-based, incremental, etc).

6 The management of physical and technological resources

Operational indicators
Practitioners must be able to:

1. Identify, generate and manage the physical and technological resources appropriate for providing training and development in an organisation.

Knowledge indicators
Practitioners must be able to understand, explain and critically evaluate:

1. The physical and technological resources needed to manage training and development.
2. The advantages and disadvantages of outsourcing.

Indicative content
1. Technology-based learning resources and their integration into training and learning strategies. Using technology in the management of the function.
2. Physical resources needed for the effective implementation of training and development strategies and policies.
3. The case for and against using a dedicated training centre (e.g., learning resource centre, residential management centre).
7 The management of training and development professionals

Operational indicators

Practitioners must be able to:

1  Manage internal and external training professionals, including their recruitment and development.

Knowledge indicators

Practitioners must be able to understand, explain and critically evaluate:

1  The skills and knowledge that training and development practitioners need and how they may be developed.
2  The identification of training services and providers, including:
   • sources of training expertise within organisations
   • factors to consider when negotiating the purchase of training services
   • negotiation and management of contracts
   • management of external consultants and other training providers.

Indicative content

1  Characteristics and skills of effective training and development practitioners; nationally recognised skill standards and qualifications for training and development professionals.
2  Building, deploying and managing the training and development team and ensuring its continuous professional and career development.
3  Utilising the expertise available within the organisation to support vocational training.
4  People inside and outside the organisation who can contribute to the provision and support of training initiatives (eg as part-time trainers, mentors or coaches). Managing external consultants and other training providers, including:
   • criteria for selecting external suppliers of services
   • drawing up contracts for the purchase of training services
   • negotiating and managing such contracts.
5  Effective support arrangements (including administration and development).

8 Collaboration with stakeholders

Operational indicators

Practitioners must be able to:

1  Support, advise and collaborate with line managers and other stakeholders, inside and outside the organisation, in the running of the training and development function.

Knowledge indicators

Practitioners must be able to understand, explain and critically evaluate:

1  Identification of the stakeholders and their values and aims in the training and development process.
2  The roles of line managers, both in organisations where training and development is centralised and where it is decentralised.
3  Factors in the work environment likely to enhance or inhibit the performance of individuals and teams.

Indicative content

1  Stakeholder analysis, inside and outside the organisation to identify the critical relationships. Primary and secondary customers/clients.
2  Attitudes to training and development within organisations. Political factors likely to undermine the effectiveness of training and development.
3  The identification and management of the expectations of a range of stakeholders (eg senior management, line management and personnel/human resources management).
9 The marketing of the training and development function

Operational indicators

Practitioners must be able to:

1 Develop the profile and credibility of training and development within an organisation using marketing principles.

Knowledge indicators

Practitioners must be able to understand, explain and critically evaluate:

1 Strategies for building and enhancing the image and reputation of training and development.
2 Marketing principles and practices.

Indicative content

1 The benefits of raising the status of the training and development function. Strategies for building the status and credibility of the training and development function.
2 Principles of marketing and how they may be applied (eg training as a business, customer/client analysis and segmentation, resource analysis, developing a marketing plan).
3 The marketing mix, as applied to training and development (eg training products/services, promotion, place, pricing).
4 The relationship between training needs and marketing.

10 The evaluation of the training and development function

Operational indicators

Practitioners must be able to:

1 Use appropriate methods to audit and evaluate critical training and development operations and processes in the organisational context, so as to demonstrate the efficiency, effectiveness and added value of the training and development function.

Knowledge indicators

Practitioners must be able to understand, explain and critically evaluate:

1 Criteria for deciding an evaluation strategy.
2 Evaluation practice and techniques, including:
   • a range of quantitative and qualitative performance indicators
   • using audits and benchmarking as part of an evaluation strategy.

Indicative content

1 Principles of evaluation of:
   • the training and development function
   • alternative training strategies, arrangements and activities.
2 The range of purposes of evaluation in relation to different stakeholders and the uses to which information from evaluation may be put.
3 A range of strategies, methods and techniques appropriate for evaluation and their strengths and weaknesses.
4 The purpose, principles and practices of training audits and benchmarking.
11 The implications of political, diversity and ethical issues for the training manager

Operational indicators

Practitioners must be able to:

1. Model good management practice and deal professionally with political and ethical issues that arise in the course of managing the training and development function and its operations, and in relation to its policies and plans.

Knowledge indicators

Practitioners must be able to understand, explain and critically evaluate:

1. Equal opportunities and diversity issues.
2. Critical relationships and political dilemmas in organisations.
3. The role of the professional training practitioner in modelling organisational values and good management practice.

Indicative content

1. The legal framework around diversity and equal opportunities issues.
2. Ethical and political factors likely to be encountered (e.g., confidentiality, performance issues, relationship difficulties).
3. Dilemmas to balance (e.g., organisational and individual needs, demands and expectations of different stakeholders).