

INTRODUCTION

The intention is to consider the kind of questions that might be asked and answered in a review of the operation of a training function. The review can be a valuable managerial procedure for identifying successes and failures, areas for improvement and the appropriate remedial action.

METHOD

A useful method of carrying out a review of the operation of a particular training function in a particular organisation is to start by preparing a questionnaire. This questionnaire should cover the main areas of training activity, which will vary considerably from one training function to another.

The person or group responsible for conducting the review - the Training Manager or whoever it may be - should decide the questions to be asked and then proceed step by step to obtain the answers.

SUGGESTED QUESTIONS FOR REVIEW PROCESS

The questions listed below are intended to provide broad coverage of the activities to be reviewed. These questions are not intended to be used as they stand; they should be used to stimulate your thinking about the kind of questions you should ask.

The list of questions provides general indications of topic or problem areas to be examined but they are not specific questions to be asked in all organisations. Many questions overlap or approach the same topic from different directions.

Training and Development functions differ considerably. That makes it difficult to say in which direction a review should be aimed. However, a general approach on the following lines can be suggested.

1. Decide purpose of the review and how results will be used against resources and timescale.
2. Decide which questions to use as a starting point. The list, which follows, can be used as a convenient checklist of possible questions to be considered.
3. Collect and record facts, opinions related to the question.
4. Analyse the situation that emerges. Examine facts and opinions, consider possible interpretations of their importance; analyse trends, and establish possible improvements that can be made.
5. Prepare proposals for action.

1. ROLE AND PROFILE

- 1.1 What is the title of the function?
- 1.2 What is its principal purpose?
When, on what basis, and by whom, was it defined?
Does it need to be revised?
- 1.3 What are the function's specific objectives?
Are they coherent and do they provide clear orientation for training and development activities?
- 1.4 What is the range of the function's main activities?
How are they related to the organisation's overall training and development policy?
What are the relationships between the main areas of activity?
- 1.5 To whom does the function report?
Does the function's status within the organisation help it to meet its objectives?
- 1.6 What do others expect of the function?
What services do they now receive?
What services would they like?
What would trainers like to offer them?
What is preventing this?

2. ENVIRONMENT

- 2.1 What environmental factors influenced the growth and development of this function in the past:
Technological?
Economic?
Political?
Social?
Other?
- 2.2 What changes are likely to occur in the near future?
- 2.3 Could the function meet the training and development needs that could arise?
- 2.4 What implications could they have for current training and development strategies?
- 2.5 How do trainers follow and analyse new trends in the public sector environment?
What implication does this have for the organisation's overall training and development policy?

3. CLIENTS

A client can be defined as "One who employs another professionally, as adviser or agent'. Your clients are therefore all the people who use your services or seek your advice).

- 3.1 Who are clients within the organisation?
- 3.2 Who are prospective trainees?
- 3.3 What sectors of the organisation are served by the function?
What categories of employee are dealt with?
Does this have any implications for overall effectiveness?
- 3.4 On what basis and how, are potential 'trainees' identified?
- 3.5 How are training or development initiatives started?
- 3.6 How is information received about the background, needs, and priorities of clients?
How are their needs and wants identified?
- 3.7 How are priorities for training established?
- 3.8 On what basis and how are actions or initiatives decided?
- 3.9 What strategy is used to follow up the progress of individuals after a training course?
- 3.10 What comparisons can be made, about serving clients, with other similar training functions?

4. LINKS AND BOUNDARIES

- 4.1 How are links maintained with other functions in the organisation? (List the major functions and how links are maintained with each).
- 4.2 What are the formal relations with other functions?
How does this influence the overall training and development function in the organisation?
- 4.3 What are the links with external agencies?
- 4.4 What are the links with the local community?
- 4.5 What are the links with training institutions?
- 4.6 Is an active role being taken in shaping the training system, both internally and externally?
- 4.7 Are internal and external groups informed effectively about the function's policy, objectives, and services? What use is made of public relations and promotional activities?

5. RESOURCES AND COMPETENCES WITHIN THE FUNCTION**People:**

- 5.1 What is the size, structure, and competence, of the professional training staff?
How is the staff structure and competence related to objectives, activity areas, and initiatives?
- 5.2 Is internal part-time expertise used effectively?
- 5.3 What is the size and competence of the function's support and administrative staff?
- 5.4 Are outside experts used effectively?
- 5.5 What the recruitment policy for training staff?
How is it implemented?
- 5.6 What is the career and staff development policy?
How is it implemented? (Include whether such systems as succession planning, job rotation, etc. are used)
- 5.7 How is the performance of individual and groups appraised?
How are the results of staff appraisals used?
- 5.8 What motivates the training staff?
What demotivating factors exist?
- 5.9 What is the remuneration policy?
How does it influence staff performance, recruitment, turnover, and development?
- 5.10 How are training staff kept up-to-date and aware of what is happening elsewhere in the organisation?

Professional Competence:

- 5.11 What professional trainer development programmes are provided?
How are newly appointed training staff inducted?
Are staff required to take the Direct Trainer Skills course?
What use is made of the Design of Training course?
How are trainers encouraged to use their operational experience?

- 5.12 What is the extent and quality of training materials?
 Who is responsible for material development?
 Are materials developed 'in-house'?
 Is expertise available to develop materials?
 Are commercial or aid agency materials used?
 Are materials 'networked'?
- 5.13 Are new types of training and development programmes being developed?
 In what areas, and why these in particular?
 Are they based on all the stages of Systematic Approach to Training?
- 5.14 Are different training strategies being used?
 Are the training methodologies used suitable for adult learners?
 Is use made of computer-based training systems?
 Is distance learning used?
 Has Open Learning been considered?
- 5.15 Is the function able to provide effective on-the-job training?
- 5.16 Is consulting and practical problem-solving capability and experience available?
 What kind and complexity of investigations or assignments have training staff successfully completed?
 What further could be achieved?
- 5.17 Is the function able to coordinate and combine educational, training, consultancy services, and other activities to serve clients?
 Does this enable training staff to develop their professional capabilities?
- 5.18 How are professional and support services used, both by training staff and by clients?

Facilities and Equipment:

- 5.19 Are facilities adequate in terms of space, location, functional design, and appearance?
 What is the policy/practice for using external facilities?
- 5.20 Are support facilities (residential, catering, etc.) appropriate to client expectations and the needs of trainees?
- 5.21 Is there a policy for updating and, where necessary, improving facilities?

Finance:

- 5.22 What is the financial situation?
 Are financial resources adequate to support functional activities?
- 5.23 To what extent is the function a budget control centre, able to manage its financial affairs?
- 5.24 Is there likely to be a change in the financial situation?
 What would happen if it occurred?

6. MANAGEMENT SYSTEM**Organisational Structure:**

- 6.1 Why was the present internal organisational structure chosen?
How does it affect the utilisation of training resources?
- 6.2 How effective are collective decision-making, advisory, and coordinating bodies?
- 6.3 How effective are the key individual activities and roles in the structure?
- 6.4 Is the organisation of administrative and support services satisfactory?
Do these services provide adequate support to professional services?

Management Style:

- 6.5 What are the main characteristics of the management and communication style used within the function?
- 6.6 How is consultation and participation organised?
- 6.7 What impact does this style have on the motivation and behaviour of professional staff?
- 6.8 What impact does the style of management have on the performance and image of the function?

Planning:

- 6.9 Is there a strategic planning system?
Was it designed or has it been imposed?
- 6.10 What has been the real impact of strategic planning on the development and performance of the function?
- 6.11 How effective is operational programme and resource planning?

Performance, Monitoring, and Review:

- 6.12 How are operations monitored and controlled?
- 6.13 Who reviews performance?
- 6.14 What is considered as 'output' and 'achievements'?
- 6.15 At what levels are outputs identified, measured, and evaluated?
- 6.16 What conclusions are drawn from performance control and review?
How can these conclusions improve strategic and operational management of the function?

7. SUMMARY

- 7.1 Which of the function's activities have been most (and least) successful?
Why?
- 7.2 What are the function's main achievements?
- 7.3 What future challenges and opportunities are most important?
- 7.4 What are the function's critical strengths and weaknesses?
- 7.5 What principal conclusions for future strategy can be drawn from this review?