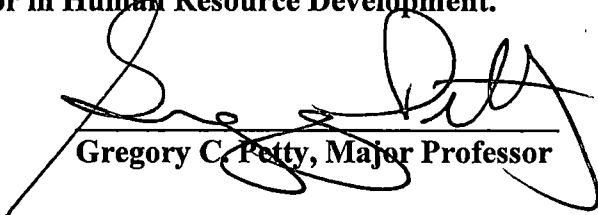


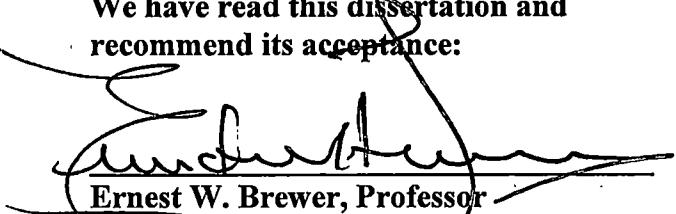
To the Graduate Council:

I am submitting herewith a dissertation written by Robert T. Nora entitled "Professional Responsibilities of Human Resource Development and Organization Development Practitioners and Researchers." I have examined the final copy of the dissertation for form and content and recommend that it be accepted in partial fulfillment of the requirements for the degree of Doctor of Philosophy, with a major in Human Resource Development.

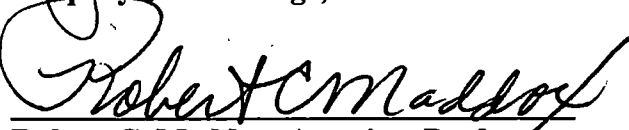


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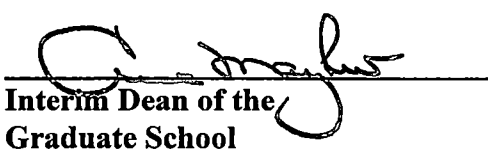


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PROFESSIONAL RESPONSIBILITIES OF
HUMAN RESOURCE DEVELOPMENT
AND ORGANIZATION DEVELOPMENT
PRACTITIONERS AND RESEARCHERS

A Dissertation
Presented for the
Doctor of Philosophy Degree
The University of Tennessee-Knoxville

Robert T. Nora

August 2001

This dissertation is dedicated to my life partner,
Edna Joyce Marie Ranson Nora,
and our two greatest gifts;
sons Robert Thomas Nora Jr.
and Richard Timothy Nora

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ABSTRACT

This study was designed to develop a maximum understanding of the human resource development (HRD) and organization development (OD) professions and the professional responsibilities within them. Therefore, HRD and OD professionals were asked to go beyond the identification process and rate the importance of each professional responsibility from “not important” to “critical”. The essential professional responsibilities are those needed by HRD and OD professionals to perform their current and future work.

The method used in this study was a post hoc survey designed to identify and rate the professional responsibilities within the human resource development and organizational development professions. It also investigated the self-perception of the HRD and OD professionals as either researchers or practitioners. This study used both quantitative and qualitative techniques. Related demographic information including information concerning membership in professional associations was included in the data collection.

The purpose of this study was threefold: (a) to develop a practitioner/researcher validated list of professional responsibilities as perceived by the HRD and OD professionals, (b) to investigate the possible relationship between the professional responsibilities and the HRD and OD professionals, and (c) to rate the importance of professional responsibilities as perceived by HRD and OD professionals.

A survey instrument, the Human Resource Development and Organization Development Professional Responsibilities Inventory, was developed to gather the data.

Exploratory factor analysis was used to group 54 professional responsibilities into three factors: change management strategies, workforce development, and facilitative /communication skills.

Study participants were current HRD and OD professionals. They were randomly selected from the membership lists of seven prominent professional associations and were currently involved in organizational change. This study was unique in the aspect that electronic mail (email) was the primary data collection procedure. All survey instruments were emailed to the participants, including the pilot group. However, although email was encouraged as the primary method to return the surveys, other traditional methods such as U.S. mail and facsimile (fax) were offered as alternative methods.

A total of 253 HRD and OD professionals agreed to participate in the study. However, only two hundred and nine respondents completed and returned the surveys. The respondents placed themselves into one of four categories: HRD practitioners (HRDP) 39%; HRD researchers (HRDR) 17%; OD practitioners (ODP) 35%; and OD researchers (ODR) 10%.

This study provided profile information on HRD and OD practitioners and researchers and developed a prioritized listing of professional responsibilities as perceived by the professionals. It showed that there is an overlapping interdependence between HRD and OD professionals and revealed that 70% of the identifiable professional responsibilities are similar in both professions.

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CHAPTER I

Introduction

Background

Throughout US history, companies have been influenced significantly by evolving social, technical, and economic developments (Webb, 1999). Organizations and human resources have reflected the needs, demands, and pressures of these developments. Successful organizations depend directly on the success of those human resources who work within them. It is also believed that both human resource development (HRD) and organization development (OD) practices are the most important functions in successful companies (p. 9).

The HRD and OD professions developed, to a certain extent, to respond to changes within organizations brought on by environmental challenges (Benson, 1999). In the 1998-99 World Employment Report (1999), the International Labor Organization contended:

The increasing pace of globalization and technological change provides both challenges and opportunities at a time when the global employment situation remain grim and levels of open unemployment and under employment remains high in most countries. In taking advantages of these opportunities as well as in minimizing the social costs which the transition to a more open economy entails, the level and quality of skills that a nation possesses are becoming critical factors. (p. 1)

The Bureau of Labor Statistics (BLS) (1999) reiterated that the economy is confronted with the challenges of rapid technological changes, globalization of world markets, and profound demographic shifts. These challenges are reshaping the workplace and the workforce in terms of the nature and types of jobs, the composition of the human

resources and their education, competencies, and experiences in the world of work (p. 1). In addition, these accelerating external challenges necessitate organizational, process, group, and individual changes within governmental, nonprofit, and corporate organizations (Bolman & Deal, 1991; Green, 1999; Kotter, 1996).

The same external environmental challenges influence the current competencies in the HRD and OD professions, which in turn affects the professional responsibilities needed by its practitioners and researchers (Bassi, 1998; Cummings & Worley, 1997). This also leads to expansion and growth of professional associations and educational programs within the HRD and OD professions (Queeney, 1996).

Carnevale, Gainer, and Meltzer (1990) stated that a competency is the knowledge, skill, ability, or attitude required for success at accomplishing a particular job. Spencer and Spencer (1993) enhanced this concept by stating that a competency is also an underlying characteristic of an individual and is useful in determining one's behavior across a wide variety of situations and job tasks.

Fletcher (1990) concluded in her qualitative study that there are gaps in current literature concerning specific information about practitioners and researchers. Indeed, based on a review of the literature, there is a scarcity of studies that deal with researchers or the interaction between practitioners and researchers (p. 19). Most literature focuses solely on the practitioners. Even so, Cummings and Worley (1997) noted that few empirical studies have been done on HRD and OD practitioners. However, Fulmer (1995) reported that some academicians are moving to bridge the gap between the creative thinking done in academic institutions and the applied world of business practitioners. He cited the Organizational

Learning Center associated with the Sloan School of Management at Massachusetts Institute of Technology as a premier example of such an effort.

According to Dayal (1989, p. 9), HRD is a shared belief by management in the development of individuals. It involves a strategy of linking organization development with individual growth. As organizations have struggled in an increasingly competitive economy, superior human resources are seen as a competitive advantage (Beer & Walton, 1987, p. 353). The development of people is regarded as the most important asset for both improving and sustaining organizational performance (Dayal, 1989, p. 11). However, there is an interdependence between OD and HRD; in fact, in many cases, the OD efforts precede the HRD initiative. The interdependence was further espoused by Hiatt, Cangemi, and Kowalski (1989). They identified the goals listed below as necessary for success within the OD profession. The sixth goal stipulates that OD sets up a system which continually develops personnel within the organization (p. 29). That sixth goal is identified by McLagan (1989) as an HRD activity.

1. Establish an open, problem solving environment throughout the organization.
2. Create a balance between authority based on role or status (legitimate) and authority based on knowledge or experience (power).
3. Decipher responsibilities as close to the source as possible.
4. Establish a trusting environment throughout the organization.
5. Utilize collaborative efforts and making competition more pertinent to work goals.
6. Set up a system which continually develops personnel within the organization.
7. Create in the members of the organization a sense of loyalty to the organization.

8. Aid managers in the realization of changing needs and objectives.
9. Increase autonomy and directions of persons within the organization.

Thach and Murphy (1995) noted that competency studies historically have been conducted by interviewing a group of experts to gather their opinions on the skills, knowledge, and attitudes necessary to perform a job effectively and efficiently (p. 60). Identification of specific competencies within a profession is the initial step in creating effective professional development programs (American Society for Training and Development, 1983). Competency studies are expected to increase in frequency and provide conceptual framework for organizations to build on (Bines, 1992, p. 19).

Statement of the Problem

HRD/OD professionals must take responsibility for building their competence in line with organizational needs and their own career goals. They must determine the professional responsibilities necessary to further their careers.

Professional responsibilities are available from many sources. They may be attained, for example, from professional associations, higher education, and mentors. This study attempted to support those sources by developing a list of current professional responsibilities needed by today's HRD/OD professionals to upgrade their skills and competence in order to keep pace with rapidly changing environment.

The results of this study can also be enormously helpful to HRD/OD professionals who take responsibility for their own career development, are preparing to enter the profession, and faculty who are planning to update undergraduate and graduate HRD/OD curricula. The following questions are answered: a) Which professional responsibilities

are important for the HRD/OD professional to learn to achieve success? and b) What is the order of importance of the professional responsibilities.

Purpose of the Study

The purpose of this study was threefold: (a) to develop a practitioner/researcher validated list of professional responsibilities as perceived by the HRD and OD professionals, (b) to investigate the possible relationship between the professional responsibilities and the HRD and OD professionals, and (c) to rate the importance of professional responsibilities as perceived by HRD and OD professionals.

A list of 117 HRD and OD competencies was compiled from periodicals, journals, books, technical and research reports, proceedings, doctoral dissertations, and electronic media of HRD and OD professionals. Each of the 117 competencies was examined by a focus group for relevance, accuracy, redundancy, and clarity. The focus group eliminated over half of the competencies keeping only 54 which were determined to be professional responsibilities. Table 1 lists the 54 professional responsibilities. The professional responsibilities were factor analyzed in an effort to reduce them to a smaller set of factors that could describe the HRD and OD professions. Multiple regression was performed to determine if any meaningful relationship existed between the factors and the HRD and OD professionals.

Human Resource Development

According to Nadler and Nadler (1989), human resource development (HRD) consists of organized learning experiences provided by employers within a specified period of time to bring about performance improvement and/or personal growth.

Table 1

A List of HRD and OD Professional Responsibilities as Identified by Focus GroupMembers

No.	Competency	No.	Competency
1.	Active learning	18.	Giving and receiving feedback
2.	Active listening	19.	Inter/intra group dynamics
3.	Adult learning	20.	Human resource management
4.	Business understanding	21.	Industrial understanding
5.	Career development	22.	Intellectual versatility
6.	Coaching	23.	Interviewing
7.	Competency identification	24.	Job design
8.	Computer competence	25.	Leadership
9.	Conflict management	26.	Legal environment
10.	Cost-benefit analysis	27.	Managing change
11.	Counseling	28.	Model building
12.	Cultural awareness	29.	Modeling credible behavior
13.	Delegation	30.	Motivation theory
14.	Designing interventions	31.	Organization behavior
15.	Diagnostic research	32.	Organization design
16.	Entry/contracting	33.	Performance measurement
17.	Facilities management	34.	Persuasion

Table 1 (cont)

No.	Competency	No.	Competency
35.	Policy analysis	45.	Sociotechnical analysis
36.	Presentation	46.	Statistics
37.	Professional development	47.	Systems/engineering analysis
38.	Process consultation	48.	Team development
39.	Project management	49.	Theory building
40.	Proposal and report writing	50.	Training and development
41.	Questionnaire design and use	51.	Transorganizational development
42.	Relationship building	52.	Trust and rapport
43.	Reward systems	53.	Visioning skill
44.	Role analysis	54.	Writing skill

They list three activity areas within the framework of HRD:

1. Training - learning focused on the present job of the learner
2. Education - learning focused on a future job for the learner
3. Development - not job focused

HRD is a dynamic profession with a mission of optimizing the energy and competencies of people at work. It has always been concerned with training and development, organization development, and career development (McLagan, 1989, p. 4). HRD has evolved to a broader focus on improving workplace performance by developing human resources. Those HRD practitioners who cast themselves only in traditional training roles are finding themselves unable to respond to new challenges, or playing only small roles in the change process (Holton & Trott, 1996, p. 2).

Organization Development

Organization development is a change strategy for occupational self-development and renewal and it has been used more and more widely in various organizations (Fullan, Miles, & Taylor, 1980). It comprises a set of actions undertaken to improve organizational effectiveness and employee well-being (Beer & Walton, 1987, p. 339). Most organizations have OD departments and staff that manage systematic change (Varney, 1996). These functions come under many guises such as organization effectiveness, change management, and continuous improvement (p. 603). Organization development's core purpose is to help organizations make smooth transitions from their present state to a desired future state. These transitions are forms of OD interventions that deal with creating a new vision of possibilities for a newly transformed organization

(Fletcher, 1990, p. 13). One of the recent visible responses to this transformation is the emergence of OD as a framework for organizational change. Within this framework practitioners and researchers alike can come to grips with the complexities involved in the organization and in managing human resources (Varney, 1996, p. 602).

Significance of the Study

This study identified professional responsibilities and provided a description of those competencies for use by practitioners and researchers in the HRD and OD professions. The findings can be utilized to develop HRD and OD components: competency job profile, curriculum development, competency-based training, performance management, and intervention design.

Secondarily, this study provides data on how the HRD and OD practitioner and researcher differ in their perception of the professions' professional responsibilities. This can be a major factor when determining the continuing professional education (CPE) needs of the HRD and OD professionals.

Finally, this study can be used as a preamble to planning professional development activities for HRD and OD researchers and practitioners. These activities include formal training programs, self-development resource guidance, job assignments, organizational structure, and other interventions designed to create individual competence. In addition, there are also courses offered by academic institutions and several private associations like the National Training Laboratory (NTL) Institute. The NTL was initially created to train OD practitioners (Weisbord, 1987; Varney, 1996).

Theoretical Framework

This study is primarily framed within the organization theory and the general systems theory. The organization theory states that all organizations function as a total system (Bolman & Deal, 1991, p. 27). Von Bertalanffy's (1949; 1950) general systems theory proposes that all systems (cell, person, group, organization, and society) are in active exchange with their surrounding environment and make changes as a result of their linkage to the environment. According to Foshay and Moller (1992), it was in 1966 that Katz and Kahn first applied open systems theory to organizations and argued that the open systems model directs attention to the environment in which the organization functions. They, along with Hanna (1988), posited the characteristics of open systems. One of the primary characteristics states that the systems theory views organizations as open systems that are affected by their environment (French & Bell, 1995, p. 125). The environment is considered to be everything outside of the system. Turbulent environments and open systems create irreversible general change for organizations which requires them to alter their course or face serious disruption (Weisbord, 1987, p. 112). Currently, HRD and OD professions are being impacted by such environmental challenges as technological changes, globalization of world markets, and demographic shifts.

Additionally, this study is anchored within an emerging essential competency theory, developed by Prahalad and Hamel (1990), which was reported in the Harvard Business Review. The core competency theory proposes that as organizations change, they should restructure according to what they do best in their industry (Marquardt, 1996,

p. 25). Therefore, organizations structure themselves according to competencies.

According to Quinn (1993, p.114), an organization's core professional responsibilities are the collective set of skills, knowledge, and attitudes that gives the organization the dominating depth needed for competitive advantage in serving its collective customers - both in the near future and permanently.

Professional responsibilities are also relevant to an individual who serves as a member of a profession. In fact, an increasing number of professions have identified the competencies that represent their professional standards (Dean, 1994, p. 201). The basic meaning of competence is the ability to do a job successfully, which refers to the broad ability of an individual or organization to accomplish tasks (Carr, 1992 p. 14).

Competencies are the specific skills needed to support this broad ability.

The professional responsibilities represent the competencies needed by HRD and OD professionals to perform their current and future work. Within an open system framework, as a profession grows and changes, so does its professional responsibilities.

Research Model

Within this theoretical framework, it is proposed that the HRD and OD professions function as open systems and that both are evolving based upon the impact of major environmental influences. It is also proposed that any restructuring accomplished as a result of these influences should be driven by the professions' professional responsibilities. The theoretical constructs addressed in the design of the model consist of (a) major environmental challenges, (b) HRD and OD professional responsibilities, (c) practitioners, (d) researchers, (e) workforce, (f) work process, and (g), workforce.

Figure 1 depicts a Professional Responsibilities Model. The model shows that the professional responsibilities of HRD and OD professionals are influenced by major environmental challenges. This in turn affects how the practitioners and researchers respond to the needs of the workplace, work process, and workforce.

Major Environmental Challenges

The major environmental challenges consists of rapid technological changes, globalization of world markets, and profound demographics shifts. They are dynamic - constantly changing (O'Conner et al., 1996). Inherent in the challenges is the need to reorganize the workplace, work process, and the workforce itself (Kher, 1997).

HRD and OD Professional Responsibilities

The HRD and OD professions contain the body of knowledge and the professional responsibilities used by the practitioners and researchers to respond to the challenges impacting the organizations, workforce, and workplace. HRD and OD professional responsibilities cover a wide spectrum of skills, knowledge, and activities with seemingly endless variations (Cummings & Worley, 1997). Current and future challenges such as globalization and information technology generate new sets of competencies as well as adaptations to traditional competencies. Some of the newer competencies that have emerged include consulting skills, team work, computer competence, and process consultation. Professional responsibilities are capabilities that distinguish a profession through defining the many roles of its membership (Nichols, Sikes, Isselmann, & Ayers, 1996). These roles are positions in the professions that are defined by the expectations and behaviors of its members. Professional responsibilities are one of the many



Figure 1. Professional Responsibilities Model

characteristics that enable occupations to be recognized and accepted as professional (Ulrich, 1997).

HRD and OD Practitioners

HRD and OD practitioners are primarily full-time consultants, either internal (working for one organization only) or external (working for a number of different organizations). They acquire much of their competence from hands-on experience and attendance at workshops (Bolman & Deal, 1991, p. 68).

HRD and OD Researchers

Many HRD and OD researchers are employed by universities, write most of the books, have doctoral degrees, and have extensive training in the social and behavioral sciences (Bolman & Deal, 1991, p. 68). They are primarily charged with developing new knowledge through an orderly investigative process that is useful to the practitioners (Swanson, 1996).

Frequently, practitioners collaborate with researchers as a part of a major project. These productive partnerships should be encouraged to last beyond the life of the project. Fruitful collaborative efforts between the two groups is not only possible but important and urgent (Schuler, 1997).

Workplace

The workplace includes government, nonprofit, and corporate organizations (Bolman & Deal, 1997; Green, 1999). As the volatility of environmental challenges continues, current organizations will have to adopt or become dinosaurs (Kotter, 1996, p. 161).

Work Processes

Work processes are the intangible systems in the workplace used by the workers to produce goods and services (Deming, 1986). Included are strategic planning, decision making, reorganizations, evaluating, conflict resolutions, goal setting, interpersonal communications, meetings, motivation, and incentives (Bolman & Deal, 1997, pp. 266-270; Gilbert, 1996, pp. 85-88). Kher (1997) stated that in order for organizations to survive, they must make changes in their work processes as they respond to the environmental challenges.

Workforce

The workforce consists of individual workers, workgroups, and team members (Green, 1999). A better educated workforce and increased skill requirements are a result of the environmental challenges (Finnerty, 1996). The challenges are pushing towards a more autonomous, well-trained workforce. Demographic shifts are contributing to changes in the ethnic, racial, and gender diversity (Bolman & Deal, 1997, pp. 113). The workplace, work processes, and workforce are a subsystem within the Professional Competency Model. They are interrelated and therefore are not only influenced by the major environmental challenges, but are greatly influenced by each other (Senge, 1990).

Change is not new, but it may feel new because the pace of change has accelerated. Therefore, it is not always the changes that adversely impact the workplace, work processes, or the workforce: it's the transitions (Bridges, 1991). To be of value to organizations, HRD and OD professionals will need some new responsibilities. They can update their skills and knowledge in order to develop interventions that enable the

organizations to successfully complete their transitions (McLagan, 1994).

Research Questions

The major research questions investigated in the study are:

1. Can a validated practitioner-researcher list of professional responsibilities be reduced into a significantly smaller set of factors for use within the HRD and OD professions?
2. Do HRD and OD researchers and practitioners differ in their perceptions of the professional responsibilities?
3. What are the relationships between the background demographic variables and perceptions of the HRD and OD practitioners and researchers?

Null Hypotheses

In order to investigate the research questions of this study, the following null hypotheses were investigated:

- H₀1: The validated practitioner-researcher list of professional responsibilities cannot be reduced into a significantly smaller set of factors.
- H₀2: There is no significant difference between HRD and OD researchers and practitioners in their perception of the professional responsibilities.
- H₀3: There is no relationship between the demographic background variables and the practitioners' perception of the factored competencies.
- H₀4: There is no relationship between the demographic background variables and the researchers' perception of the factored competencies.
- H₀5: There is no significant difference between the HRD and OD researchers' and practitioners' ratings of their professional responsibilities.

Assumptions

The following assumptions were used in this study:

1. Members of selected HRD and OD professional associations are able to rate

the importance of professional responsibilities in the HRD and OD professions.

2. Factor analysis will reduce the validated list of professional responsibilities to a minimum number of factors.
3. The collected data can be classified as interval level data (Gay, 1996, pp. 302-306).

Delimitations

The following delimitations were used in this study:

1. The sample population was delimited to members of five HRD and OD professional associations with international memberships.
2. The study participants were delimited to current HRD and OD professionals with email addresses.
3. The professional responsibilities were delimited to a set of competencies identified by a comprehensive review of related literature and subjected focus group review.
4. The results of this study are delimited to the HRD and OD professionals.

Definition of Terms

The following terms are presented with an operational definition for clarification:

1. Cluster: A group of competencies organized for the purpose of simplification. Also known as a theme (Mirabile, 1997).
2. Competency: A knowledge or skill (professional responsibility) which is required for success within a profession.
3. Continuing Professional Education: The education of professionals, regardless of their practice setting, that follows their preparatory curriculum and extends their learning and assimilation of information (Queeney, 1996).
4. Interventions: Planned activities that are accomplished within an organization to aid in awareness and solution of problems. These activities help the organization grow and change as smoothly as possible.

5. Knowledge: An understanding gained by practical experience.
6. Profession: Any field of practice defined by a body of knowledge and requiring specific education or experience for entry into that practice.
7. Professional: A person who, by education, training, and/or experience, performs work, analyzes and solves problems, makes decisions, and promotes ethics associated with a particular field of study. The professional works in concert with others who share characteristics, competencies, applications of knowledge, and behaviors (Rusaw, 1995).
8. Professional Association: An organization consisting of mission, objectives, structures, professional responsibilities, and processes centered about the education, training, and development of a voluntary membership situated in specified fields of knowledge and practices, clientele, and values (Rusaw, 1995).
9. Skill: The ability to perform a certain physical or mental task (Spencer & Spencer, 1993).

Organization of the Study

This study is organized into five chapters. Chapter I contains the introduction, which includes the purpose of the study and a brief discussion of both the human resource development and organization development professions. It includes the significance of the study, theoretical framework, research model, research questions, research hypotheses, assumptions, delimitations and limitations, definition of terms, and the organization of the study.

Chapter II is a review of related literature and research which surveys the evolution of the HRD and OD professions, characteristics of the HRD and OD professionals, professional responsibilities of the HRD and OD professionals and their continuing professional education.

Chapter III details the methods used to develop the study. It includes the research

design, population and sample, data and instrumentation, and explains the data analysis procedures.

Chapter IV presents analyses of the data. It provides a profile of the survey participants, answers the research questions, and evaluates the null hypotheses.

Chapter V summarizes the research project. It also contains the major findings and conclusions, as well as recommendations for further study.

CHAPTER II

Review of Related Literature and Research

Introduction

The literature review includes research and writing on the HRD and OD professions, the characteristics of its professionals, and the associated HRD and OD competencies. The context of this review is the recent upsurge and interest in the area of competencies. It is also extended to include literature about continuing professional education and professional associations. The following was compiled after a comprehensive search and review of related literature, including books, journal articles, dissertation abstracts, government publications, newspapers, and research studies.

The chapter is divided into five sections: (a) adult education as a precursor to HRD and OD; (b) evolution of human resource development; (c) evolution of organization development; (d) current status of HRD and OD; (e) characteristics of HRD and OD practitioners and researchers; (f) HRD and OD professional responsibilities; and (g) HRD and OD continuing professional education.

Adult Education: Precursor of HRD/OD

Adult education has been in existence since the dawn of civilization, but it was not until the work of some significant pioneers in the early 1920s that the title adult education was applied to those activities and the field itself was established (Houle, 1992). Adult education was also viewed as social intervention to help uplift the working class (Stubblefield & Rachal, 1992). According to Houle, Hudson's History of Adult Education, first published in 1851, the term was used to imply the organized and

institutional provision of learning opportunities primarily for the lower classes of the community.

There is ample evidence that even in the preindustrial society, the continued existence of the group required the education of its youngest members in skills and habits and community organization. As mankind invested in tools, clothing, shelter, and language the need for training and education became an essential ingredient the advancement of civilization (Steinmetz, 1976, p. 1-3). For example, 2,000 years ago a society of Native Americans became adept at sophisticated pottery making, which required learning to transfer those skills from one generation to another. The skills and knowledge of the crafts could be transmitted only by direct instruction from the skilled craftspeople to the unskilled (Miller, 1996, p. 4). Even the commerce and fortresses established by the Spanish settlers in the southwestern United States would not have been possible without the transference of the knowledge required to operate those activities effectively. Thus developed an apprenticeship system whereby an experienced person passed along knowledge and skills to a novice; who through the years would develop into a journeyman (Miller, p. 4).

The United States entered the Industrial Revolution in the beginning of the nineteenth century. Industrialization meant two changes in the work force: a) specific training was required before specific work could be done and b) work activity was focused away from an individual, family, and small group toward a large impersonal organization (Miller, 1996, p. 6). The increasing complexity of machinery required the use of learning programs for adults. Experienced workers were no longer able to remain

the sole source of learning because many of them had never learned about the newer machinery. The younger workforce entrants discovered they could prepare for and obtain goods jobs by learning about the new technology before entering the job market. This trend gave rise to schools for mechanical arts which served as a major supplier to the workplace. Out of necessity, factory schools were created, in which workers were trained in the classrooms within a company or a work group (Sleight, 1993). Although the companies did not turn to the educational system for help in training their work force, the schools continued to prepare persons for jobs in industry. The education of persons preparing themselves for industry jobs became known as vocational training (Miller, p. 7).

Hoe and Company, in 1872, were among the first to develop factory schools (Miller, 1996, p. 7). The company manufactured printing presses and had such a high volume of business that it was critical to establish a factory school (Steinmetz, 1976, p. 1-6). The classroom subjects consisted of how to do the tasks required in the factory (Sleight, 1993). Around this time, the mechanics' institute offered basic education and vocational skills to young workman during this era as well (Houle, 1992). Other companies such as Westinghouse (1888), General Electric Company (1901), and International Harvester (1907) began to develop their own factory schools. By 1910 other companies saw the advantages of having factory training schools and they soon became common practice. Most of these training programs in industry were established to handle normal, day-to-day operations (Smith, 1942, p. 59).

The National Society for the Promotion of Industrial Education was formed in

1906, in New York, by a group of 250 educators interested in vocational education (Miller, 1996, p. 9). This group changed its name to the National Society for Vocational Education in 1918 and eventually merged with the Vocational Association of the Middle West (founded in 1914) to become the American Vocational Association in 1925.

The National Association of Corporation Schools was formed in 1913. It was started with 60 members representing 34 corporations (Miller, 1996, p. 9). By 1918 its main focus changed from vocational education to personnel. The name was changed to the National Association of Corporation Training in 1920. They then merged with the Industrial Relations Association of America and became the National Personnel Association. A few years later the name was changed to the American Management Association.

Other needs of the employers for skilled workers were met by the increasing influx of immigration. The industrial development period is marked by this overwhelming tide of immigration. Many of these immigrants brought with them the skills they had learned in their old country. Adult education flourished in evening public high schools to keep up with the demand for the Americanization of the immigrant workforce (Nadler & Nadler, 1989). These classes included citizenship and English. Another form of adult education, correspondence schools, also emerged during this period. This occurred when Thomas J. Foster, editor of the Mining Herald conducted a correspondence course in mining safety through his newspaper. It was so successful that other courses were soon added. Education (for a future job) was provided by a variety of public and voluntary organizations. For example, the YMCA had an extensive program of

education for work as one of its mainstays.

The benefits of all of these activities accrued to the employers who could continue to meet their workforce needs through these kinds of organizations rather than by providing in-house HRD needs. This approach satisfied the needs of those companies that relied extensively on immigrant labor, but many of the growing companies needed a different kind labor (Nadler & Nadler, 1989). Engineers were in great demand, but it was found that their education did not prepare them for the job vacancies that existed. To meet this need, in 1906, the University of Cincinnati, College of Engineering, introduced a plan for cooperative education. Developed by Dean Schneider, the plan was for the student to go to school for a time and work in the factory for an equal amount of time. The student would repeat the process until they graduated from the university. The process required a contract between the employer, the school, and the student (Miller, 1996, p. 8). This was reputed to have been the first organized attempt to link education to identified future jobs. However, as this need continued to grow, companies began making arrangements to meet that need through internal HRD units.

Evolution of Human Resource Development (HRD)

McLagan (1989) wrote that HRD is the integrated use of training and development, organization development, and career development to improve individual, group, and organizational effectiveness. Rosenberg (1996) further enhanced the definition of HRD as organized learning experiences provided by employers within a specified period of time to bring about the possibility of performance improvement and/or personal growth (p. 382). Human resource development is concerned with improving the

performance of individuals through such activities as training, career development, feedback, and incentives.

In the 1890s, the National Cash Register Company began employing training and development activities. They established the Sugar Camp operations, in Dayton, Ohio, to provide various education and development courses. It was appropriately called the University Under Canvas. In 1901, the American Institute of Banking started providing HRD for member banks and is still doing so today. At about the same time, General Electric and International Harvester began to offer in-company HRD programs (Nadler & Nadler, 1989, p. 25). The federal government was also involved in HRD at this time. In fact, one of the oldest established agency training centers for federal employees is the National Bureau of Standards Graduate School, which began operating in 1908 (United States Civil Service Commission, 1968, p. 86).

The growth of HRD was also evident in the activities of New York University and the Carnegie Institute of Technology. Around 1910, these institutions offered courses for corporation teachers (Sleight, 1993). Up to this point, the HRD emphasis had been on skills and technical expertise, but Charles Gantt, who developed the Gantt Chart, wrote of the need for leadership training. In addition to employers and the government, unions also conducted HRD activities. In 1916, the International Ladies Garment Workers Union established an education department that operated primarily to improve the quality of its shop stewards through training programs (Nadler & Nadler, 1989, p. 26).

Toward the end of the 1920s, the military was undergoing rapid expansion of its uniformed members due to U.S. involvement in World War I (Sleight, 1993). The

Emergency Fleet Corporation of the United States Shipping Board met the challenge of training the growing workforce by setting up an educational training section. At this time, there were 61 shipyards and 50,000 workers, but there was an urgent need for ten times as many workers. It became necessary to provide training as rapidly as possible, but most of the instructors lacked teaching/training experience (Miller, 1996). Charles R. Allen developed a simple method to provide training and education to the workforce including the supervisors. It consisted of four steps: preparation, presentation, application, and evaluation (show, tell, do, and check) (McCord, 1976).

Again, during World War II, the need for an efficient and effective method of training became urgent. Training Within Industry (TWI) was formed by the National Defense Advisory Commission to respond to this need. Thus, Job Instructional Training (JIT) was developed (Hardman, 1963, p. 97). Like Allen's method, it consisted of four steps: prepare the learner, give a step-by-step presentation, do the performance tryout, and follow up with inspection.

Around this time, training departments had become established in many companies and individualized instruction was introduced (Sleight, 1993). Norman Crowder developed a training program in which the learner's possible responses were multiple choice, and the program branched according to the response chosen (Lysaught, 1962, pp. 30-31).

In the 1960s, various other strands of adult training activities within organizations coalesced into a single activity called human resource development (Houle, 1992). Now HRD has become an international concept and is instrumental in adult education in both

private and public enterprises, including those of developing nations (Frank, 1974, p. 72).

As the need for unskilled labor diminishes and vacant, highly specialized positions skyrocket, organizations must bridge the gap between the technocrat and the assembly line worker (Ratra, 2000). To fulfill this need, human resources must be trained and their competencies maintained. The training and maintenance will be accomplished, not just through traditional schooling, but also by well-managed conventions within organizations. To this end, the profession of human resource development continues to evolve (p. 4).

Evolution of Organization Development (OD)

The emphasis and focus of the behavioral science movement began with interventions aimed at individual behavior. Organizations began to realize that laudable as individual growth may be, what was really needed was organization development (OD) (Rush, 1996). The profession focuses on both group and intergroup effectiveness particularly as it pertains to managing organizational change (Holton & Trott, 1996). In the 1960s, OD gained worldwide acceptance and became the most talked-about training approach or practice of that decade. Its components were manager selection, personnel development, organizational structure, interpersonal relations, and group dynamics (Miller, 1996, p. 15). Trainers became involved with more than just the training, education, and development of the workforce. They were concerned with the well-being of the entire organization. In fact, many senior trainers became OD consultants. Today, professionals are performing OD activities in schools; communities; and local, state, and federal governments (Cummings & Worley, 1997, pp. 4-6).

The term organization development did not become a part of the vocabulary until about 1960 (Burke, 1982). The OD profession is still in its infancy when compared to other disciplines. Because of its youth, the profession is still being shaped by newer iterations of older methods and discovery of newer techniques.

Varney (1996) identified three factors involved in the OD practice:

1. It is a long-range effort to introduce change based on a diagnosis which is shaped by the members of an organization.
2. It involves the entire organization or a coherent system of parts thereof.
3. Its goal is to increase organizational effectiveness and enhance organizational choice in self-renewal.

Hiett, Cangemi, and Kowalski (1989) indicated there are five fundamental OD strategies that provide the foundations for an OD program. The first strategy is that OD is a planned process. It must be organized systematically to be effective to the organization. The second strategy implies that the OD process must be implemented throughout the organization. The third strategy relates that management must have an interest in the development and expansion of OD. For organization development to work effectively, it should be an integral part of the organization's strategic plans. The fourth strategy is that OD must aid the organization in creating and maintaining its culture, vision, goals, functions, and community enhancement. The fifth strategy involves the use of planned interventions. The organization development interventions are the active part of the OD strategies.

Defining Organization Development

Defining OD has always been difficult. However, there are a number of

acceptable definitions, each with a slightly different emphasis (Cummings & Worley, 1997, p. 1).

Beckhard's (1969) definition states that OD is an effort that is planned, organization-wide, and is managed from the top in order to increase organization effectiveness and health through planned interventions in the organization's processes. This is done by using behavioral science knowledge to address the process of OD.

French (1969) defines OD as a long-range effort to improve an organization's problem-solving capabilities and its ability to cope with changes in its external environment with the help of external or internal behavioral-scientist consultants, or change agents. This definition is concerned with OD's long-term interest and the use of consultants (Cummings & Worley, 1997).

Beer's (1980) definition also addresses the OD process: a system-wide process of data collection, diagnosis, action planning, intervention, and evaluation aimed at enhancing congruence between organizational structure, process, strategy, people, and culture; developing new and creative organizational solutions; and developing the organization's self-renewing capacity. This all occurs through the collaboration of organizational members working with a change agent using behavioral science theory, research, and technology.

Burke's (1982) definition of OD is a planned process of change in an organization's culture through the utilization of behavioral science technology, research, and theory. It focuses attention on culture as the target of change.

The key words in the aforementioned OD factors and definitions are planned

change, total quality, increased organizational effectiveness, interventions, behavioral science knowledge, individual needs, company goals, and change agent. Varney (1996) and Cummings and Worley (1997) incorporated most of these views in their definition of OD: organization development is a system-wide application of behavioral science knowledge to the planned development and reinforcement of organizational strategies, structures, and processes for improving an organization's effectiveness.

The current practice of OD emerged from five major backgrounds or tenets: (a) laboratory training, (b) action research and survey feedback, (c) participative management, (d) quality of work life, and (e) strategic change (Cummings & Worley, 1997).

Laboratory Training Tenet

This tenet was based on the growth of the National Training Laboratories (NTL) and the development of training groups that were known as sensitivity or T-groups (Cummings & Worley, 1997, p. 7). Laboratory training is a "real world" workshop where through experiential exercises and role playing individuals learn from group interaction and experiences of others group members. According to Miller (1996), laboratory training is highly respected and has become one of the most widely used training methods since its inception in 1947. In fact, the most common method of laboratory training used by organizations today has been the sensitivity training lab, the heart of which is the T-group: T for training (National Training Institute, 1999; Rush, 1996). Applying T-groups to organizations eventually became known as "team building" (Cummings & Worley, 1997, p. 8).

Action Research and Survey Feedback Tenet

The action research contribution began in the 1940s with studies conducted by social scientists John Collier, Kurt Lewin, and William Whyte, which led to OD's emergence as a practical field of social science (Cummings & Worley, 1997). Action research was refined by Rensis Likert, in the 1950s, while he directed the Survey Research Center at the University of Michigan (Rothwell, 1996). Likert was recognized for his innovative use of written survey questionnaires to not only collect information about organizations and their problems, but to provide feedback to the survey respondents and stimulate joint planning for organization improvement (p. 52). Bolman and Deal (1991) felt that T-groups and survey research were the parents of OD.

Participative Management Tenet

The laboratory training and action research/survey feedback tenets led to the belief that a human relations approach was the one best way to manage organizations (Cummings & Worley, 1997). Likert (1967) felt participative management was designed around group management decision making and supervision and that it fostered a high degree of worker/manager involvement and participation. Pfeffer (1978) looked at participation management as an example of co-optation: a process whereby an organization gives something to individuals in order to induce them to align themselves with the organization's needs; while Bolman and Deal (1991) viewed it as giving workers more of an opportunity to influence organizational decisions.

Productivity and Quality-of-work-life Tenet

Productivity and quality-of-work-life (QWL) were based on European models

developed in the 1950s by Eric Trist at the Tavistock Institute of Human Relations in London Projects (Cummings & Worley, 1997). Tavistock's trainers foresaw analogies between learning groups and the workplace organization (Weisbord, 1987). This movement was first used in United States in the 1960s. In the 1970s, QWL became a useful tool for uniting management and organized labor in increasing workforce employment security. It emphasized high quality products and service across organizational levels and between customers and producers (p. 44). Productivity and QWL gained momentum by joining forces with the total quality management movement (Robbins, 1997).

Strategic Change Tenet

Strategic change involves improving the alignment within an organization's environment, strategy, and organization design. Organization development has always maintained that the organization is an open system that continually interacts with its environment to maintain a state of equilibrium between business strategy and several internal arrangements as structure, systems, management styles, skills, and shared values (Beer & Walton, 1987, p. 348). Organizations and their technological, political, and social environments have become more complex and uncertain; this trend has produced the need for a strategic perspective from the OD profession (p. 350).

Current Status of HRD and OD

Human resource development departments consist of many experienced professionals serving as training and development specialists. Their roles include skills in traditional and modern approaches to training (Sheppeck, 2000). The organization

development specialists are competent in consulting or advisory service. Their focus is on techniques or programs to change people and the nature and quality of interpersonal work relationships (Rothwell & Kazanas, 1994).

HRD departments prepare the workforce for dealing with the future through training, education, and development. HRD involves the processes of staff development and evaluation (Webb, 1999).

In prior years, the OD specialist was looked upon as an organizational physician who applied processes as cures to the organization's problems. Today, OD is viewed as a multivariate process involving a number of interrelated steps that will help the organization fulfill its purpose (Fonte, 2000). Both HRD and OD deal with improving the everyday life of the organization.

Similarities of HRD and OD

HRD and OD are more similar than different. Both deal with improving the functions of the workforce and the organization. HRD appears to center on the rank and file while OD stems from management concerns. Heathfield (2000) contends that when organizations fail to include HRD and OD in their strategic plans, these organizations begin to lose their edge and eventually fail. He further explains that HRD and OD must work together as a team.

Further, they work together with a common focus on career development techniques, improving individual and organization effectiveness, and performance evaluation (Alligood, 1999). They both deal with issues such as training, motivation, direction, and leadership of the organization. According to Argyris (1999) they also share

the following core values and long-term goals:

1. Improving customer satisfaction;
2. Increasing profits; and
3. Lowering costs

HRD and OD are both approaches to change within an organization. They make a concerted effort to improve the organization's attitude as well as its work performance (McNarara, 1999).

Human resource development and organization development both assess the external and internal environment prior to developing change strategies. They look to the external environment to ascertain information about their competition, technological developments, and legal issues. Internally the emphasis is on auditing the exemplary performance of the workforce and identifying those competencies needed by the workforce that will help the organization fulfill its long- and short-range goals (Levine, 1995).

Differences of HRD and OD

In most instances, HRD is concerned with learning strategies that enhances the performance of the organization's human resources (DuBrow, Wocher, & Austin, 1999). OD emphasizes planned organization change that involves interpersonal relationships and intergroup culture (pp. 1-6). Hicks (2000) contends that HRD is primarily concerned with the personal growth of individuals within an organization and OD, in turn, develops the organization's structures, systems, and processes.

Typically, the goals of HRD are achieved through short-term training methods,

intended to ultimately boost job performance (Rothwell & Kanzas, 1994). OD focuses on long-term change; a strategy that is compatible with the visions of top management (Rothwell, 1995). The difference between the two can be found in their perspectives. OD takes a more holistic approach to the organization, working toward long-term goals. HRD strives towards its goals through more short-term, practical methods. These differences complement each other when applied towards the goal of producing an efficient, effective, and viable organization.

Summary

Both HRD and OD must interact and work together towards the effectiveness of the company. They have the same goal but different approaches. When properly combined, they form a symbiotic energy that gives every employee a sense of purpose and the organization a sense of direction.

HRD and OD Professionals: Practitioners or Researchers

McKeon (1947) concluded that in his writings, Aristotle made it clear that the results of theoreticians' (hereafter referred to as researchers) modes of thinking are ideas and theories, while the results of the practitioners' mode of thinking are actions. Aristotle further advocated that researchers and practitioners not only do things differently but they value and perceive things differently.

It is important to understand the practitioner and researcher domains, but it is equally important to consider the various ways they are related to each other (Connelly & Clandinin, 1988, p. 87). McKeon (1952) identified four possible relationships between researchers and practitioners: logistic, operational, problematic, and dialectic. In the

logistic relationship, the domains of research and practice are seen as distinct. Practice is treated as applied theory. The research emphasis is on the development of knowledge aimed at controlling the uses of the theory in practice. The operational relationship indicates that practice is seen as validating the relevant theory through the actions taken (p. 94). Ideas are converted to processes that a practitioner can apply. Subsequently, the practitioners furnish the researchers with data for continued study and with tests of the utility of research results (Schon, 1984). The problematic relationship is concerned with how practitioners view researchers' theories as problem-solving tools. Even though the practitioners use the theories, they have no direct interest in them. Their purpose is to solve the problem that confronts them. There are no general theoretical solutions, only specific solutions to particular problems as they emerge (Connelly & Clandinin, 1988, p. 95). In the dialectic view, theory and practice are considered inseparable; researchers and practitioners are co-participants. Problems of theory are seen in practice, and practice is theory in action. The researcher and the practitioner no longer watch situations but rather actively participate in them.

HRD and OD are professional fields for both practitioners and researchers (Cummings & Worley, 1997, p. 1). They consist of social action (practice) and an area of scientific inquiry (research). The practice covers a wide spectrum of activities such as team building, organizational structural change, job enrichment, and interventions to name a few. Similarly, the research addresses a broad range of topics including the effects of change, the methods of organizational change, and empirical data of factors that influence success. As successful professions, HRD and OD must become concerned with

the theory and practice of managing the continual adaptation of internal organizational arrangements to changes in the external environment (Beer & Walton, 1987, p. 340).

Fletcher (1990) interviewed and profiled 14 organization transformation /development practitioners and researchers in her qualitative study. She was interested in gathering specific information concerning the interaction between practitioners and researchers. Of her survey 14 participants, 9 had doctoral degrees; 4 were university professors; 13 were consultants; and 12 were published authors (p.17). She asked the survey participants (a) What is the difference between theorists and practitioners? and (b) What are you, a theorist or a practitioner?

In response to the first question, most survey participants made a distinction between theorists and practitioners, but still expressed a belief that practitioners must be theorists and, conversely, that theorists must have some practical experience. The following attributes were given to the practitioners: living, doing, and experiencing the way organizations operate; people using some of the theorists' ideas in their work; concentrates more on doing as opposed to thinking; implements, goes out and makes things happen; and consciously or unconsciously applies theories and concepts on some theory (every practitioner operates on some theory). Conversely, the following attributes were given to theorists: develop concepts, ideas, value systems (the development of values clarification is also a part of theory development); major writers lean more toward theory, definitions, ideology, and concepts; spends a lot of time researching, putting out hypotheses, and coming up with ideas as to how something can be accomplished; and thinks and talks about situations and does a lot of conceptual work and analyses (Fletcher,

1990, p. 17).

The responses to the second question revealed that 12 of the survey participants identified themselves as a combination of both practitioners and researchers. The remaining two survey participants were identified as practitioners only. No one identified themselves strictly as a researcher (Fletcher, 1990, p. 27).

Practitioners (consultants, managers, and human resource professionals) and researchers (academicians, scholars, and theorists) represent the two tiers of the HRD and OD professions (Bolman & Deal, 1991). Cummings and Worley (1997) stated that there has been a tremendous growth in the number of practitioners since 1977 in both HRD and OD practices. In organizations involved with change and in those countries where HRD and OD are practiced, practitioners are joined by researchers who contribute to the profession by studying and reporting on organizational and workforce change (p. 18).

Practitioner Characteristics

Most HRD and OD professionals believe that the field consists of consultants who try to help clients improve their organizations by applying knowledge from the behavioral sciences and related disciplines (Varney, 1996). Therefore, practitioners should have working knowledge of organization theory, learning process theory, motivational theory, personality theory, organization structure, role theory, power and authority, leadership, interpersonal dynamics, and small group theory (p. 604).

Hiatt et al. (1989) take a humanistic view of the practitioner. They believe the practitioner must (a) act as a role model for the organization they are helping; (b) be in touch with the feelings and emotions within the organization; (c) show congruence

between what they espouse and actions taken; and (d) convey everything positive, practical, and productive to the well-being of the organization. The practitioner should be able to encourage, support, critique, accept criticism, and create working ideas (p. 32).

Cummings and Worley (1997) applied the term practitioner to at least three groups of people. The most obvious group are those specializing in HRD and OD as a profession. These are primarily internal or external consultants who offer their professional services to organization clients including senior managers, functional department head, and staff groups (Cummings & Worley, 1997, p. 47).

Secondly, the term applies to those specializing in related fields such as reward systems, organization design, total quality, information technology, business strategy, and performance improvement technology. In most cases these related professionals do not have extensive knowledge of HRD and OD training and experience, but they are gaining competence through working with traditional professionals on large-scale projects and attending training sessions (Cummings & Worley, 1997, p.164). They also become proficient by applying HRD and OD practices to their own specialties.

Finally, the term applies to the increasing number of administrators and human resources managers who have gained competence in HRD and OD and applied it to their own work areas (Cummings & Worley, 1997, p. 165). The application by managers rather than consultants has grown with the inclusion of HRD and OD concepts, values, and methods into general management literature and practice (Beer & Walton, 1987, p. 340). In this instance, HRD and OD must be taught as a general management skill if these managers are to become change masters within their organization (Kanter, 1983).

An intervention does not always have to be directed by a person within the HRD and OD departments. A trained, experienced member of the organization can engineer the process themselves (Hiatt et al., 1989). However, it is not unusual to find HRD directors changing their job title to OD directors (Nadler & Nadler, 1989, p. 35).

Researcher Characteristics

The role of research is to change the status quo through formal research processes. It is not a job, but rather a systematic investigation of ongoing work that is embedded within an organization (Swanson, 1996). HRD and OD researchers are social and behavioral scientists who are actively engaged in formalized, rigorous hypothesizing, data collection, and analysis and are as a general rule associated with a college or university. They want to understand how various forms of practice affect the nature of individuals, groups, processes, and organizations. Researchers are an integral part of the organizational world, particularly those who are concerned with change. They have critical roles to play in the understanding and development of change management (Schuler, 1997).

Experienced researchers are humble by nature and skeptical of untested theories (Swanson, 1996). Beer and Walton (1987) believed that theory building in the HRD and OD professions has always been weak. Developing hypotheses is a critical and commonplace aspect of research, whereas this act is seldom undertaken by practitioners. Yet, hypothesizing is critical to effective application of theories and this is unlikely to occur without researchers.

Researchers are sometimes tempted to only collect data that is narrowly focused

on their research hypothesis. Most social (and behavioral) science research is deemed as being too abstract to be any use to the practitioner (Schuler, 1997). As long as researchers emulate traditional science methodology, they will confine themselves to isolated episodes of change (Beer & Walton, 1987, p. 344). Researchers must actively participate in the action research traditions of HRD and OD with the full participation of their clients in the research effort (Schuler, 1997).

Frequently researchers collaborate with practitioners as a part of a major project. They are generally aware of research funding programs and can help practitioners by informing them of opportunities in their specific areas of interest. These productive partnerships should be encouraged to last beyond the life of the project (Schuler, 1997). Fruitful collaborative efforts between the two groups are important and urgent.

HRD and OD Professional Responsibilities

The HRD and OD competencies seem to overlap, but each profession has its origins in different academic disciplines (Nadler & Nadler, 1989). Nevertheless, competencies are the knowledge, skills, and attitudes used by HRD and OD professionals that enable them to perform at their current level and future work (Ulrich, 1997, p. 213). This study is anchored by two landmark studies in HRD and OD competencies.

The first landmark study was done by Shepard and Raia in 1981 (details provided under the heading - Organization Development Competencies). In the Shepard and Raia study participants were tasked to identify OD competencies that were currently being used as well as those needed 20 years in the future. The study was considered so comprehensive and thorough that Cummings and Worley (1997) used it as a baseline to

develop a list of OD competencies included the latest edition of their OD textbook. Many of the OD competency studies that followed contained competencies previously identified by Shepard and Raia, the exception being recent studies that included some of the computer and telecommunications skills needed in today's environment.

The second landmark study was accomplished by Patricia McLagan (McLagan & McCullough, 1983) (details are provided under the following heading - Human Resource Development Competencies) and sponsored by the American Society for Training and Development (ASTD). The study was conducted in 1983 and updated in 1989. McLagan's Human Resource Wheel remains a fixture to current HRD textbooks and literature. In fact, ASTD is currently completing an update to the study, but it is concerned with HRD and learning experiences.

Human Resource Development Professional Responsibilities

Rothwell (1996) emphasized that many studies had been conducted to assess the roles, competencies, work outputs, ethical standards, and quality requirements of HRD (p. 57). Current thinking on HRD competencies dates from Leonard Nadler's doctoral dissertation, which examined the needs of selected training directors. In an article written as a follow-up to his dissertation, Nadler along with Gordon Lippitt, described training directors as having three major roles: learning specialist, administrator, and consultant (Nadler & Nadler, 1989, p. 57). Most of the subsequent HRD studies concentrated more on roles and activities than competencies, for instance, United States Civil Service Commission (1976); Ontario Society for Training and Development (1976); and Pinto & Walker (1978). Although the Pinto and Walker study focused more on work activities

than on underlying competencies, it was the first in a line of important HRD competency studies (Rothwell, 1996).

However, it was in 1983 that ASTD published the results of a landmark study on HRD roles and competencies (Rothwell, 1996, p. 58). The study was accomplished by Patricia A. McLagan and entitled *Models for Excellence* (McLagan & McCullough, 1983). This study identified 15 training and development roles, 31 competencies, and 102 work outputs. ASTD and McLagan updated the study in 1989 and retitled it *Models for HRD Practice* (McLagan, 1989). It was an examination of HRD, rather than training and development, that distinguishes *Models for HRD Practice* from its predecessor *Models for Excellence* (Rothwell, 1996, p. 57). Another important change was the inclusion of organization development, career development, and training as key components of HRD (McLagan, 1989, p. i). *Models for HRD Practice* identified 11 HRD roles, increased the number of competencies to 35, and reduced the work outputs to 74. Thirteen of the 35 competencies were classified as core competencies. To be considered a core competency, a competency must be found to be significant in the majority of the training roles (O'Conner et al., 1996). *Models for HRD Practice* also introduced ethical issues and quality requirements as concepts to the HRD profession (McLagan, 1989, p. 10). McLagan's study has resulted in the development of The Human Resource Wheel (McLagan, p. 6).

Geering's (1984) approach to identify HRD competencies led to the development of the Associate Diploma in Training and Development Course at the Underdale Campus of the South Australian College of Advanced Education. He reviewed many sources that

had previously identified and classified the competencies of HR developers into a number of related competency areas. These competencies and areas formed the basis of a survey instrument, the results of which were used to develop the college course. This same process was used to develop the researcher's Human Resource Development and Organization Development Professional Responsibility Inventory. The instrument was validated through a panel review and subsequently used to survey the perceptions of HRD and OD professionals.

A major finding of Rooze's (1984) study was the identification of basic skills and competencies to be used in schools, colleges, and departments of education (SCDEs), even though that was not the primary reason for his study. His purpose was to assess the basic skills and competencies of human resource development specialists in the West Texas area. He selected his population from the Dunn and Bradstreet Million Dollar Directory. Rooze had developed a needs assessment instrument from the findings of the Professional Development Committee of the American Society for Training and Development (ASTD). The results identified four roles in which professional trainers are expected to engage. From these roles came nine activity areas which resulted in 77 competencies for his instrument. The instrument used a five-point Likert-type scale and contained an "Ideal" and a "Real" section on the form. Each competency was rated from "essential" to "not important" in both sections. Demographic data was also collected in the following areas: type of business, number of employees, number of people on training staff, and training of present trainers.

Rooze's (1984) data was analyzed by placing the results in a Quadrant

Assessment Model. The model was based on the high and low frequencies generated from the survey variables. High was defined as those competencies with frequency scores equal to or greater than the means and low was defined as those competencies with frequency scores less than the mean. The frequency scores for each competency were examined and fell into four categories: high ideal-high real (39 competencies); high ideal-low real (26 competencies); low ideal-high real (no competencies); and low ideal-low real (11 competencies).

There are two noticeable discrepancies in these results, the first being that the competencies totaled 76 instead of the 77 noted earlier. For some reason, competency number 45 was not included in the final results. This competency was not identified and its absence not explained. The second is that the low ideal-high real category yielded no response from those surveyed. The explanation given was that the category was either illogical or the items selected had already been identified as trainer roles. The findings of this study consisted of a list of competencies that can be used to develop a program for the field in SCDEs. The competencies were segmented into four roles for HRD trainers.

Organization Development Professional Responsibilities

Shepard and Raia (1981) reported on a study of sixty-five OD experts to identify and prioritize the skills and competencies of OD professionals. The respondents were asked to make projections about the common skills and knowledge needed by every OD professional by the year 2000. The study used the Delphi technique. The experts reached consensus after three rounds, on eighty-four items: fifty core skills and thirty-four advanced skills (p. 50). These skills were categorized under ten prioritized competency

areas: general consultation, intrapersonal, organization behavior, organization development, intervention, interpersonal, research/research design, data collection, data analysis, presentation, experience/subject matter expert, and collateral knowledge (social science, policy analysis, systems engineering, etc).

Based on the above study and their personal expertise, Cummings and Worley (1997) believed that all OD practitioners should have the following basic skills and knowledge in order to be efficient: interpersonal skills, intrapersonal skills, general consultation skills, and organization development theory (pp. 49-51).

Dyer (1997) conducted an OD study that focused on interventions in small entrepreneurial organizations. He advocated that the results of previous studies, whether conducted by experienced researchers or practitioners were based on research at larger, traditional organizations. However, small businesses have grown faster in the past two decades and have created more jobs during this period than large organizations (p. 190). In fact, the Bureau of Labor Statistics projects that small businesses will be the prominent types of organizations during the next decade (Dennis, 1993). As opposed to traditional organizations the entrepreneurial organizations are paternalistic in nature and are patriarchal/matriarchal (Dyer, 1997, p. 196). These configurations affect the way the businesses function and the way they are organizationally developed. In this context, for OD professionals to be effective, they must be able to develop or improve the organizations' core processes (p. 204). Also, problems may be related to conflicts among the patriarchal/matriarchal structure, therefore interdisciplinary counseling skills are required (Swartz, 1989). The kinds of OD interventions change as the entrepreneurial

business evolves and matures. The organization development professional needs the expertise to regularly modify the interventions and apply them to the appropriate situations.

Buch and Aldridge (1991) recommended OD as a tool for managing organizational conditions such as downsizing because of the behavioral or human side associated with OD interventions. In their opinion, managers are more adept at handling the technical strategies and tend to disregard the social context. This leads to reduced trust, lack of organizational commitment, and increased resistance to change by the remaining workforce (p. 3). They proposed the role analysis technique and intragroup team building interventions as being useful during downsizing. Maximum effectiveness is achieved when these interventions are used in conjunction with each other because they provide opportunities for venting, confronting the appropriate business issues, and helping to overcome the dysfunctional effects of downsizing.

Based on research initially derived from studies of families, Constantine (1991) developed a theory of organizational paradigms. Organizations in the workplace, like families and other human systems, exhibit many ways by which everyday activities are regulated and common effects are coordinated by the very nature of their culture and beliefs. He acknowledged that most OD professionals are familiar with the idea of organizational culture (p. 41). At the heart of organization culture are organizational paradigms (p. 48). Organizational paradigms are the fundamental assumptions under which organizations operate. These assumptions form the basis for the organization and operation of any enterprise, commercial or otherwise. By understanding each basic

paradigm, OD professionals can tailor their routine OD competencies: team building, organizational interventions, management of change, and mergers and acquisitions to work with, rather than against, the underlying organizational model.

Levin and Gottlieb (1993) explored the attraction of quality management to OD practitioners as an intervention technique. They felt that many practitioners would rely solely on the popular techniques (e.g., process improvement) used in Total Quality Management. As a result, other viable interventions would not be explored. Their study warned of the risk involved if quality management became the only technique used as an OD intervention.

HRD and OD Continuing Professional Education

Queeney (1996) posited that continuing profession education (CPE) has the potential to increase the competence of professionals. She further stated that CPE referred to the education of professionals, regardless of their practice setting, that follows their preparatory curriculum and extends their learning (pp. 722-723). It has emerged as a special area within adult and continuing education during the past 25 years (Rohfeld, 1991). CPE today remains as an evolving field, existing for people who have a commitment to meet education, training, licensing, and certification requirements throughout their careers. Ideally, CPE enables professionals to keep abreast of new knowledge, and to maintain as well as enhance their competence. Within a given profession, professional associations are motivated to provide CPE leadership to (a) provide services to their members and (b) preserve and enhance the profession's reputation (Queeney, 1996). Professional associations play distinctive roles in formal as

well as informal CPE by providing a place where professionals learn current, accurate, and highly technical knowledge requirements of their discipline (Rusaw, 1995).

Professional organizations work to meet the needs of their constituents. They are motivated to provide career knowledge and professional services to their members in order to preserve and enhance the profession's reputation (p. 711). Through CPE, professional associations transmit knowledge and foster personal individual development (Jarvis, 1985). Professional associations provide (a) formal and informal matrices for developing knowledge, attitudes, values, and effective techniques for practice; (b) new frames of thinking, feeling, reflecting, and experiencing; (c) roles as an authority; and (d) facilitator of knowledge for change (Rusaw, 1995).

Professional associations bring together the various professionals who work in different types of organizational structures, businesses, and cultures (Rusaw, 1995). There are hundreds of thousands of people across the country and abroad who practice HRD and OD. Many of the members of these two groups are affiliated with special HRD and OD organizations or with various other professional associations with subareas devoted to the HRD and OD field such as the American Management Association and the International Society for Performance Improvement.

A key aspect of membership in HRD and OD associations is access to information which is paramount to success (Perdue & Piotrowski, 1991). If it became imperative for a professional to ascertain pertinent knowledge on a particular survey instrument or to learn which type of research strategy is most appropriate, then that knowledge can be obtained through traditional research resources such as libraries or the Internet (p. 49). However,

for HRD and OD professionals who want to remain current in the field and keep up with newer techniques, professional organizations are available for the career management and development of their professional responsibilities (Rusaw, 1995).

CHAPTER III

Methods and Procedures

Introduction

Chapter III contains methods and procedures used in the study. It presents information on the research design, population and sample, instrumentation, data collection, and data analysis.

Research Design

The method used in this study was a post hoc survey designed to identify and rate the professional responsibilities within the human resource development (HRD) and organization development (OD) professions. It also investigated the self-perception of the HRD and OD professionals as either researchers or practitioners. This study used both qualitative and quantitative techniques. A focus group was used to develop the list of professional responsibilities and to refine the survey instrument. Factor analysis and multiple regression were used to analyze the collected data. Related demographic information including information concerning membership in professional organizations was included in the data collection.

Population and Sample

Survey participants were current HRD and OD professionals with electronic mail (email) addresses. They were selected from five professional associations: (a) International Society for Performance Improvement, (b) American Society for Training and Development, (c) Academy of Human Resource Development, (d) National Association of Industrial and Technical Teacher Educators, and (e) Organization

Development Network.

International Society for Performance Improvement

Founded in 1962 as the National Society for Performance Improvement, the International Society for Performance Improvement (ISPI) is the leading international association dedicated to improving productivity and performance in the workplace. The organization represents more than 10,000 international and national chapter members throughout the United States, Canada, and 40 other countries. Its membership consists of performance technologists, training directors, human resources managers, instructional technologists, organizational consultants, and faculty at institutions of higher learning. ISPIs' mission is to improve the performance of individuals and organizations through the application of Human Performance Technology (International Society for Performance Improvement, 1998).

American Society for Training and Development

Founded in 1944, the American Society for Training and Development (ASTD) is the world's premier professional association in the field of workplace learning and performance. ASTD has more than 70,000 members who come from all areas of business and industry and from more than 150 countries across the globe. Its leadership and members work in multinational corporations, small and medium-sized businesses, government agencies, colleges, and universities (Plott, 1998).

Academy of Human Resource Development

The Academy of Human Resource Development (AHRD) was founded in 1993. It was formed to encourage systematic study of human resource development theories,

processes, and practices; to disseminate information about HRD; to encourage the application of HRD research findings; and to provide opportunities for social interaction among individuals with scholarly and professional interests in HRD, from multiple disciplines and from across the globe (Academy of Human Resource Development, 1998).

National Association of Industrial and Technical Teacher Educators

The National Association of Industrial and Technical Teacher Educators (NAITTE) was founded in 1937 to develop closer cooperation among educators engaged in the preparation of teachers in technology education, trade and industrial education, and vocational education. Its primary goal is to promote opportunities for professional development and growth of its clientele. Most members of NAITTE are faculty at institutions of higher education or from industry or military training (HRD) organizations. In conjunction with the Association for Career and Technical Education (ACTE), formerly known as the American Vocational Association, NAITTE has developed special programs such as applications of technology to HRD (National Association of Industrial and Technical Teacher Educators, 1998).

Organization Development Network

The Organization Development Network (ODN) is an association of organization development practitioners representing. About half the ODN members are employed by private industry, nonprofit organizations, and government agencies. The remaining members either engage in private practice or teach. While the ODN is a U.S.-based association, members are from more than 90 countries (Organization Development

Network, 1998).

Instrumentation

The survey instrument used in this study was developed by the the focus group. The instrument's contents were compiled from a review of literature and research of HRD and OD professionals (McNeil, 1995). The initial review revealed 117 HRD and OD competencies that had been previously identified and were currently being utilized by HRD and OD professionals. Thach and Murphy (1995) stated that historically competency studies have been conducted by interviewing a group of experts to gather their opinions on the skills, knowledge, and attitudes necessary to perform a job effectively and efficiently. Therefore, this study used a focus group to refine the list of competencies. The focus group's membership was based upon (a) availability, (b) a minimum of 15 years of experience in the HRD and OD profession, (c) interest in the research project, and (d) willingness to participate in the research project. Locality was important because the focus group method necessitates face-to-face meetings. The researcher would serve as the focus group moderator.

All members of the focus group were members of at least one of the five professional associations aforementioned. Each potential focus group member was contacted through email detailing information about the study and requesting their participation. An email reply was requested. Seven focus group members were selected to participate, which fits within Greenbaum's (1993) suggested use of four to seven members. After all focus group members were selected, a meeting was scheduled for the group to discuss the competencies to be included in the instrument. The focus group

meeting was lasted approximately 90 minutes (Doxey, 1996; Sherraden, 1998).

Each focus group member was emailed an informational packet to review prior to the meeting. The packet contained (a) a copy of the email forwarded to each potential member in order solicit their participation (Appendix A), (b) an overview of the study (Appendix B), (c) a list of the 117 competencies and their operational definitions (Appendix C), (d) a matrix composed of each competency and its source(s) (Appendix D), and (e) a sample of the survey instrument. The focus group members were tasked to accept, delete, combine, or edit each competency. Since all of the competencies were derived from the literature review, they were not tasked to add any. Their input was used to insure clarity of the survey instrument.

As a result of the reviews, the competency list was reduced from 117 to 72. All comments were noted and changes made as deemed necessary by the researcher. Doxey (1996) recommended a secondary review by the focus group members after initial changes were made to the survey instrument. This second review was accomplished by way of email. The focus group members were asked to take a final review of the survey instrument. The results were a further reduction in the number of competencies form 72 to 54.

Pilot Test

Following the development of the survey instrument, 17 HRD doctoral students were asked to complete the survey instrument and provide feedback on readability, time necessary to complete the survey, and item content. Since this study was to rely heavily on email as the medium for transmitting the instrument and receiving the responses, the

students were surveyed via email. The internal consistency reliability of the survey instrument was .9475 as determined through the use of Cronbach's coefficient alpha. Minor adjustments to the survey instrument were made in accordance with students' feedback, such as appearance and time needed to complete the survey.

Final Instrument

The finalized survey instrument appears is composed of two sections. The first and longest section of the instrument contains the alphabetical listing of 54 professional responsibilities and their operational definitions. The second section has a place for each participant to identify themselves as either (a) an HRD practitioner, (b) an HRD researcher, (c) an OD practitioner, or (d) an OD researcher. It also contains the general demographic data.

Focus Group Methodology

A focus group is a small, temporary group of individuals formed for the purpose of collaborative discovery (Templeton, 1994). The goal of focus groups is not consensus building, but the identification of a variety of items (Buttram, 1990). A focus group provides a unique way to determine perceptions of the participants, in a relaxed, nonthreatening environment (University of Texas-El Paso, 1997). Focus groups provide an excellent way to undertake specific issues because their aim is to conduct a focused discussion (Hart, 1995). The focus group technique has become an increasingly widely used method of academic social and behavioral science research (Byers & Wilcox, 1988; Regional Economic Development Authority International, 1998).

Guidelines for Conducting Focus Groups

A focus group typically involves a number of individuals from a target group who participate in a structured discussion. Greenbaum (1993) recommended the use of four to seven participants (minigroup) to serve as focus group members. Some researchers feel more in-depth information can be gained from a smaller group, while others feel that it is not feasible to recruit more than seven representatives for any particular profession (p. 3). The small group size should not number fewer than four members; smaller groups tend to be dominated by one or two members. Conversely, larger groups inhibit members' participation. Sherraden (1998) suggested that seven to eight participants have been shown to be optimal sizes for group interaction.

The group is facilitated by a moderator who follows a relatively unstructured interview guide and plays a key role in the success of the group (Byers & Wilcox, 1988). Moderators should be careful not to inject their own points of view into the procedure (Cohen & Engleberg, 1989).

Selecting a site for the focus group sessions depends on the accessibility of needed equipment, the location of the focus group members, input from the moderator, and unpredictable contingencies (Templeton, 1994). The setting should relax the participants and promote interaction (Doxey, 1996, p. 3).

Focus group sessions are generally convened to last from 90 to 120 minutes (Doxey, 1996, p. 2). Evenings are considered to be the primetime to conduct focus group sessions for most employed adults (Templeton, 1994).

Utilization of Focus Groups

Doxey (1996) used focus groups in her study of approaches for developing training material and curriculum policies. The focus group technique has been useful as a social and behavioral science research tool for generating consistent and reliable data. She stated that the focus group methodology contributed a perspective which gave her study a high degree of content validity (Doxey, 1996, p.1).

Byers and Wilcox (1998) presented in their paper on an alternative method to gather qualitative data that focus groups can provide: (a) data which is not obtainable through paper and pencil process self-report measures or observational measures; and (b) the opportunity to obtain data which is not necessarily germane to any particular group or setting. They described three specific applications of focus group methodology. Two were doctoral dissertations and one was an organizational communication consulting project. In the dissertation by Yuhas (1986), four separate focus groups were used to obtain a qualitative analysis on marital themes. The second dissertation (Lehman, 1987), used focus group in an attempt to evaluate various smoking campaigns of a prior generation. The organization consulting project was an ongoing project that used a focus group to identify (a) core values and (b) structural organizational barriers. The focus group appears to be the best way of obtaining data to achieve each of the three research objectives (Byers & Wilcox, 1998, p. 14).

Focus groups techniques can be used to (a) gain fast reaction to subjects perceived as needing improvement or change, (b) improve communication or an understanding between groups, (c) generate ideas, and (d) provide additional information to combine

with other measurement methods (Hart, 1995). Buttram (1990) found focus groups to be useful in providing input to improve survey instrument design.

Advantages of Focus Groups

Some major advantages of focus groups are the release of inhibition by the participants, the generation of a wide range of responses, and exploration of issues prior to doing quantitative research (Byers & Wilcox, 1988). Hart (1995) stated that focus groups work well because they tap into attitudes and perceptions that may be missed by other methods. Focus groups can offer speedy results, be very cost effective, give details concerning issues, and present viewpoints on issues (Doxey, 1996, p. 4).

Disadvantages of Focus Groups

The disadvantages are that focus groups may be difficult to assemble, the differences between members can be troublesome, and the results may be biased (Byers & Wilcox, 1988). Limitations include having less control over information received and receiving data that can be difficult to analyze, which could make the process time consuming and costly (Doxey, 1996, p. 40). Sometimes a secondary review of summarized data by the original members is warranted to confirm issues (p. 8).

Data Collection

Email was used to collect survey data from the HRD and OD professionals. It is defined as the systematic collection of information on a topic using computer questionnaires delivered through electronic means to an online population (Thach, 1995). This definition embraces facsimile (fax) and telecommunications (telex) (Tao & Reinking, p. 2, 1996). Participants receive, complete, and return their questionnaires via

electronic means (Thach & Murphy, 1995).

Email survey research has been utilized since the late 1970s (Kiesler & Sproull, 1986). What started out as a means of communication by a group of experts working on projects for the Department of Defense has spread and become a popular mean of mass communication (Tao & Reinking, 1996, p. 3). In fact, name and business cards usually list email addresses along with telephone and fax numbers (p. 2).

There are four characteristics of email that make it useful as a technique for survey research (Sproull, 1986):

1. Speed - Data can be transmitted in seconds to any part of the world.
2. Asynchronous communication - Data can be sent, read, and replied to at the convenience of the user. Users can take their time to think about the response.
3. No intermediaries - Data are generally only read by the receiver. No one else is expected to open and sort the e-mail messages. Email messages have a better chance of being opened by the receiver than traditional mail (Sproull, 1986; Tao & Reinking, 1996).
4. Ephemerality - Email data appears on screen and can be saved without a trace of a hard copy. The user has the option to save, delete, or print.

There are eleven key issues to consider when using email for survey research (Thach, 1995, p. 29). These issues can be divided into three categories: design, implementation, and response. Design issues are demographics, layout and presentation, user orientation and instructions, and ease of editing. The implementation issues include confidentiality, email invitation to participate, faster transmission, and cost-saving. Finally, the response issues concern speed and magnitude, faster response rates, and candid responses. The selection of HRD and OD professionals for this study was based on systematic sampling (Ott, 1992). Only those names with email addresses were selected

from the ISPI, ASTD, AHRD, NAITTE, and ODNET membership lists. With the exception of using email, this data collection method is similar to the method used in a study accomplished by Church, Waclawski, and Burke (1996). They used four professional associations: (a) American Society for Training and Development, (b) Organization Development Network, (c) Organization Development Professional Practice, and (d) Society for Human Resource Management. Church et al. (p. 29) stated that a representative sample from these associations would statistically represent the population of HRD and OD professions. The procedure used by Church et al. of randomly selecting names from each membership list was also followed in this study (p. 30).

To eliminate researcher bias, a random number between 1 and 26 (representing the alphabet) was selected to determine the starting point on each list (Gay, 1996, pp. 125-128). Then, every sixth surname was selected as a potential survey participant. Six was determined from a random number generator. The researcher maintained a list of the selectees to insure that a participants' name was not selected from multiple lists. However, this incident did not occur during the selection process. Comrey and Lee (1992) determined that 200 were participants were needed for a good representation using factor analysis. Three-hundred participants were identified as potential survey participants for this study.

Email protocol dictates that each email recipient be contacted prior to sending the survey instrument (Thach, 1995). This is to prevent spamming, which means using the network to send unsolicited data. In response to the 300 letters sent 253 recipients agreed to participate.

The Human Resource Development and Organization Development Professional Responsibilities Inventory was emailed to 253 HRD and OD professionals. One hundred and ninety-one completed and returned the survey instruments. A second emailing, which occurred a month later, increased the number of returned survey instruments to 209. A response rate of 83% was achieved. Overall, 81% of the survey instruments were returned by way of email.

Data Analysis

The Statistical Package for the Social Sciences (SPSS), a sophisticated statistical analysis package, was used to perform the data analysis. The researcher-developed Likert-type instrument was used to gather data. All data were analyzed for normal distribution. Cronbach's alpha was used to assess internal consistency of the Likert-type data (Huck & Cormier, 1996). The responses to the professional responsibilities were ranked by the using means distribution. They were then clustered for simplification and grouped through factor analysis.

The second procedure was to explore the different perceptions of the HRD and OD professionals by comparing HRD and OD practitioner ratings to those of the HRD and OD researchers. Analysis of variance was used to test for differences between the self-perception of the HRD and OD professionals by their respective professional organizations.

The variation in the data was investigated to determine the differences among the respondents based on general demographic variables. The statistical technique used was multiple analyses of variance.

Factor Analysis

Factor analysis is a statistical procedure used to discover relationships among a large set of variables. It allows numerous intercorrelated variables to be reduced into a smaller number of more basic variables, called factors (Ferguson & Takane, 1989). Factors are random variables that cannot be observed, counted, or measured directly, but which are presumed to exist in the population. They are considered to be responsible for the covariation among the observed variables (Cureton & D'Agostino, 1983; Kim & Mueller, 1978).

There are two factor analysis approaches: confirmatory and exploratory (Stapleton, 1997). Confirmatory factor analysis is used to test or confirm that certain variables belong to preexisting factors. It posits that there are underlying factors for sets of variables and then seeks to determine whether this hypothesis is valid. It is therefore a theory testing approach (Kim & Mueller, 1978).

Exploratory factor analysis is used to identify the factor structure or model for a large set of variables. It involves determining how many factors exist, as well as the pattern of factor loadings (Stevens, 1996). Exploratory factor analysis is used to determine the minimum number of factors that can account for the largest amount of variance. It is a theory generating approach (Stapleton, 1997, p.7). This study used the exploratory (theory generating) factor analysis approach.

Exploratory factor analysis assumes the existence of underlying factors and a system of observed variables. In essence, the underlying factors are latent (unobserved), hypothetical, explanatory constructs deduced from the correlations between the measured

variables of the instrument. At the conclusion of a factor analysis, all that can be said of the factors is that if they were real, they would account for the correlations found in the sample (Stapleton, 1997). Nevertheless, exploratory factor analysis is one of the most widely used techniques in quantitative social (behavioral) science (Kim & Mueller, 1978).

Factor analysis requires that data be in the form of correlations and that there be some strong correlations among the original variables (Statistical Package for the Social Sciences, 1997). There are four steps in conducting an exploratory factor analysis.

Data Collection and Generation of the Correlation Matrix

A factor analysis begins with the display of the collected data in a correlation coefficient matrix (Ferguson & Takane, 1989). A data matrix is an array of numbers with one or more rows and one or more columns (Reymont & Joreskog, 1993). However, to begin the process of determining the factors underlying the variables, a correlation matrix is used to show how the variables cluster together (Gorsuch, 1993). A statistical measure of association, in this study the Pearson correlation coefficient (r), was used to determine the strength of the relationship that is present in the data.

Extraction of Initial Factor Solution

At this point the actual number of factors underlying the variables are being determined. The chief concern, according to Kim and Mueller (1978), is whether a smaller number of factors can account for the covariation among the original, larger set of variables. The factors should account for at least 70 percent of the total data set (Gorsuch, 1983).

Rotation of Factors

To obtain an interpretable solution, a process known as rotation is used. This process is performed by the software program and is called the principle component analysis. It rotates all the variables until the simplest solutions among a potentially infinite number of solutions are identified.

Eigenvalues are assigned to each of the variables. The eigenvalues are the correlation coefficients for each variable as related to its factor. The general rule as proposed by Kaiser (1960) is to retain those factors with eigenvalues greater than or equal to one because they explain a large measure of the variance. This is the most widely used procedure, but can sometimes retain too many variables. In the Statistical Package for the Social Sciences (SPSS) (1997) computer program used in this study, the eigenvalue factor default is set at two. This study used eigenvalues greater than or equal to two as the breakpoint.

A scree plot is then displayed to help the researcher determine the optimal number of factors (SPSS, 1997). The scree plot is a graph that shows the eigenvalues on the y axis and the number of factors on the x axis. The result is the smallest and most compatible number of underlying factors.

Interpretation of Factors

Factor analysis is a statistical technique which clusters the observed variables into factors (Kim & Mueller, 1978). It does not tell the researcher what labels or meanings to attach to the factors. That decision is made by the researcher. To avoid confusion, the factors must be named something other than the name of any of the observed variables.

CHAPTER IV

Analysis of Data and Results

Introduction

There were three purposes for conducting this study: (a) to develop a practitioner/researcher validated list of professional responsibilities as perceived by the HRD and OD professionals, (b) to investigate the possible relationship between the professional responsibilities and the HRD and OD professionals, and (c) to rate the importance of professional responsibilities as perceived by HRD and OD professionals. This chapter presents the results of the survey introduced in the previous chapter, answers the research questions, and evaluates the null hypotheses.

Profile of Survey Respondents

All randomly selected professionals had email addresses and were members of a professional organization in the HRD and OD professions. Since email was the mode of transmission, all respondents were queried to obtain their concurrence and commitment to the survey. A total of 253 HRD and OD professionals agreed to participate in the study. Two hundred nine respondents completed and returned the surveys by email, regular mail, or fax. A response rate of 83% was achieved. A minimum of 200 respondents were required to give a fair representation of the population when using factor analysis procedures (Comrey & Lee, 1992, p. 217). The respondents were asked to identify certain background information about themselves (job title, professional category, continuing professional education, education level, gender, years of experience, and age). Data from the surveys were entered into an SPSS computer software program to develop a general

profile of the respondents.

In all, the respondents placed themselves into one of four categories: HRD practitioners (HRDP) 38%; HRD researchers (HRDR) 17%; OD practitioners (ODP) 35%; and OD researchers (ODR) 10%. Almost three-fourths (73%) of the respondents identified themselves as practitioners. An overwhelming majority of all respondents (77%) had either a master's or a doctoral degree. Only four respondents (2%) had only two years of college. The 36-55 age group was the most selected and represented 64% of the respondents. Ninety-two females represented 44% of the respondents, compared to the males (116).

The years of experience ranged from 0 to 42 years. A mean of twelve years of experience was calculated. Seventeen respondents (9%) had two or less years of experience with five claiming no years of experience. Twenty respondents (10%), reported they had 15 years of HRD and OD experience.

The respondents averaged three professional association memberships. Eighty percent of respondents belonged to a range of 1-4 professional associations.

Respondents attended an average of three conferences, seminars, or workshops within the past year. Only 24 (12%) indicated that they had not attend any conferences within the past year.

Research Question One

RQ1: What are the underlying factors that provide the best groupings of the HRD and OD professional responsibilities?

The first step was for the respondents to rate each professional responsibility on a

Likert-type scale with a range from 1 (not important) through 7 (critical). Means of the 54 professional responsibilities ranged from a low of 4.01 (facilities management) to a high of 6.45 (trust), as depicted in Table 2. In fact, seven of the top ten professional responsibilities are soft, intangible skills (trust, active listening, feedback, relationship building, modeling credible behavior, entry/contracting, and active learning). The remaining top ten professional responsibilities were designing interventions, managing change, and presentation skills. The professional responsibilities had a reliability coefficient Alpha of .9426, based on Cronbach's test. This indicates a high internal consistency between the survey items.

Exploratory factor analysis procedures were used to establish the construct validity of the instrument. The principal component analysis method was used to assess the factor structure of items relating to each of the constructs. The results from the scree plot (Figure 2) and an eigenvalue greater than two were used to determine the optimal number of factors. A three-factor solution was deemed the most appropriate for this study. There were 18 professional responsibilities assigned to each of the factors. Table 3 depicts the reliability analysis of the three factors.

Factor analysis arranges the observed variables together into groups called clusters. Each factor is named according to the grouping of the variables, as perceived by the researcher. Table 4 lists the names that were considered and the final name designated to each of the three factors.

The Essential Competency and Factor Loadings Matrix for change management strategies (factor 1), workforce development (factor 2), and facilitative/communication

Table 2

Ratings of Perceived Importance of Professional Responsibilities by Means

Survey item number	Professional responsibilities	Mean
52	Trust	6.45
14	Designing interventions	6.19
2	Active listening	6.12
27	Managing change	6.12
18	Feedback (giving/receiving)	6.11
42	Relationship building	6.10
29	Modeling credible behavior	6.09
36	Presentation skills	6.02
16	Entry/contracting	5.95
1	Active learning	5.90
19	Group dynamics	5.85
50	Training and development	5.84
22	Intellectual versatility	5.78
23	Interviewing/questioning	5.77
31	Organizational behavior	5.76
40	Proposal development	5.75
48	Team development	5.75
3	Adult learning	5.72

Table 2 (cont)

Survey item number	Professional responsibilities	Mean
15	Diagnostic research	5.69
39	Project management	5.69
25	Leadership	5.67
38	Process consultation	5.65
4	Business understanding	5.65
37	Professional development	5.64
53	Visioning	5.62
20	Human resource management	5.57
35	Policy analysis	5.53
7	Competency identification	5.53
54	Writing skills	5.51
30	Motivational theory	5.46
33	Performance measurement	5.45
28	Model building	5.44
10	Cost/benefit analysis	5.42
11	Counseling	5.33
46	Statistics	5.31
21	Industrial understanding	5.31
34	Persuasion	5.30

Table 2 (cont)

Survey item number	Professional responsibilities	Mean
41	Questionnaire designing	5.28
12	Cultural awareness	5.24
6	Coaching	5.24
5	Career development	5.19
8	Computer competence	5.16
9	Conflict management	5.11
47	Systems engineering	5.11
24	Job design	5.08
45	Sociotechnical analysis	5.03
32	Organization design	4.99
51	Transorganizational development	4.96
44	Role analysis	4.94
13	Delegation skills	4.89
26	Legal environment	4.87
43	Reward systems	4.87
49	Theory building research	4.66
17	Facilities management	4.01

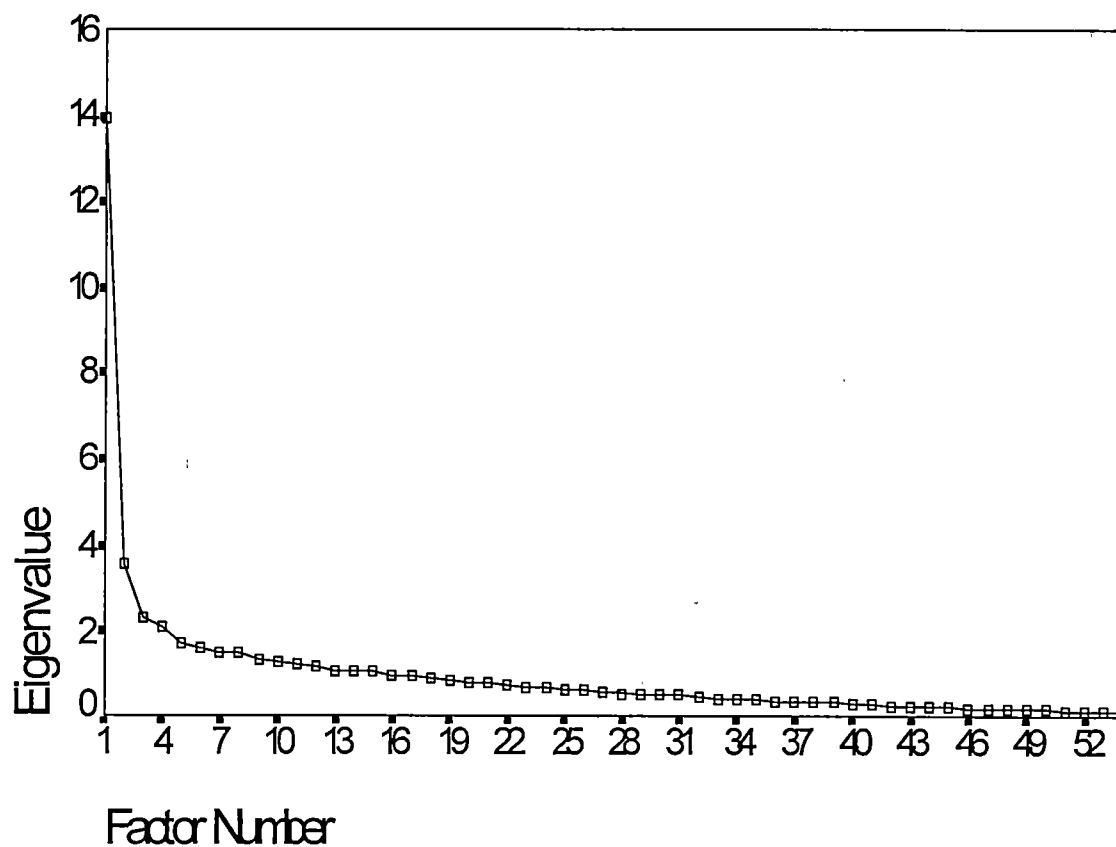


Figure 2. Factor Scree Plot. Used to identify the optimum number of factors which provides the best interpretation in factor analysis procedures. The statistically optimum number of factors are located at the bend (elbow) of the scree plots.

Table 3

Reliability Analysis of Three-Factor Solution

Factors	Cronbach alpha*	Number of items
Change management	.9039	18
Workforce development	.8744	18
Facilitative/communication	.8592	18

Note. Used to determine internal consistency of items within their factors.

* $p < .05$

skills (factor 3) are depicted in Table 5. Specifically, it shows the correlation coefficients between the variables and the three factors. The correlations are also called factor loadings. The factor loadings represent the correlation coefficients between the variables and the three factors.

Interpretation of Factors

Factor 1: Change Management Strategies

The professional responsibilities identified within the change management strategies focus on creating readiness for change and helping organizations to overcome resistance to change. Eighteen of the 54 professional responsibilities as rated by the HRD and OD professionals were factored under this category.

1. **Diagnostic Research:** able to collect data in order to analyze intervention needs. Emphasis is on problem identification.
2. **Interviewing:** able to gather information through the use of interviews, questionnaires, and other probing methods.
3. **Giving and Receiving Feedback:** able to communicate information, opinions, observations, and conclusions so that they are understood and can be acted upon.
4. **Process Consultation:** able to use a set of activities to help the client to perceive, understand, and act upon events that occur in the client's environment.
5. **Modeling Credible Behavior:** able to behave in ways that are credible to the organization members. Serves as role model.
6. **Designing Interventions:** able to develop a change effort, intervention, or program that will be consistent with an organization's goals and create desired results.
7. **Business Understanding:** knowledgeable of how the functions of a business work and relate to each other.

Table 4

Derivation of Names for Three-Factor Solution

Factor 1	Factor 2	Factor 3
Management development	HR management	Interpersonal relations
Tactical	Operational	Strategic
Assessment	Analytical	Informational
Affective	Hard skills	Soft skills
Consultative	Industrial / organizational	Interpersonal
Content	Context	Communicative
Advanced	Competent	Facilitative
Change management	Workforce development	Facilitative / communication

Note. Change management, workforce development, and facilitative/communication were eventually selected as the factor names. The accepted names were based on the perceptions of the researcher. They were perceived as not being too ambiguous and are used in the current HRD/OD vernacular.

Table 5

Three-Factor Solution and Competency Loadings

Competency	Competency loadings
Factor 1: Change management	
Diagnostic research	.71
Interviewing	.67
Giving and receiving feedback	.65
Process consultation	.65
Modeling credible behavior	.59
Designing interventions	.59
Business understanding	.57
Group dynamics	.57
Intellectual versatility	.57
Relationship building	.56
Proposal and report writing	.56
Organization behavior	.55
Managing change	.51
Cost/benefits analysis	.43
Presentation skills	.41
Questionnaire design/use	.39
Persuasion	.39

Table 5 (cont)

Competency	Competency loadings
Project management	.37
Factor 2: Workforce development	
Job design	.66
Role analysis	.65
Legal environment	.64
Organization design	.62
Competency identification	.59
Facilities management	.57
Reward systems	.57
Performance measurement	.55
Human resource management	.53
Career development	.52
Professional development	.47
Delegation skills	.45
Writing skills	.45
Training and development	.45
Industrial understanding	.44
Statistics	.39
Computer competence	.38

Table 5 (cont)

Competency	Competency loadings
Systems engineering	.32
Factor 3: Facilitative/communication skills	
Counseling	.56
Coaching	.55
Entry/contracting	.54
Adult learning	.53
Theory building	.53
Cultural awareness	.52
Active learning	.51
Motivation theory	.50
Sociotechnical analysis	.50
Model building	.49
Team development	.47
Trust and rapport	.44
Policy analysis	.42
Leadership	.41
Active listening	.38
Visioning skill	.38
Conflict management	.37
Transorganizational development	.35

8. **Group Dynamics:** (inter/intra) able to influence groups so that tasks, relationships, and individual needs are addressed.
9. **Intellectual Versatility:** able to recognize, explore, and use a broad range of ideas and practices; thinking logically and creatively without undue influences from personal biases.
10. **Relationship Building:** able to establish relationships and networks across a broad range of people and groups.
11. **Proposal and Report Writing:** able to clearly communicate your request, findings, updates, and other information through writing.
12. **Organization Behavior:** able to see organizations as dynamic, political, economic, and social systems that have multiple goals.
13. **Managing Change:** able to plan, implement, and facilitate the changes necessary to improve organizational effectiveness and performance.
14. **Cost/Benefit Analysis:** able to assess alternatives in terms of their financial, psychological, and strategic outcomes.
15. **Presentation Skills:** able to present information orally so that an intended purpose is achieved.
16. **Questionnaire Design/Use:** able to design and administer a data collection method consisting of written questions and survey responses in order to solicit subjective opinions.
17. **Persuasion:** able to influence and shape the behavior of others.
18. **Project Management:** able to plan, organize, implement, and monitor projects effectively.

Factor 2: Workforce Development

The professional responsibilities identified within the worker development strategies focus on worker development at organizational, group and individual levels. Eighteen of the 54 professional responsibilities as rated by the HRD and OD professionals were factored under this category.

1. **Job Design:** able to organize tasks, duties, and responsibilities into a work

unit.

2. **Role Analysis:** able to define the sum total of expectations that an individual and others need to perform a specific job.
3. **Legal and Social Environment:** knowledgeable of professional liability and malpractice, as well as legal compliance in regulated work areas.
4. **Organization Design:** able to develop and implement recruiting strategies to support organization's short/long term initiatives.
5. **Competency Identification:** able to identify the competency requirements of jobs, tasks, and roles.
6. **Facilities Management:** able to plan for and effectively use physical facilities.
7. **Reward Systems:** able to design organizational reward systems to improve employee satisfaction and performance.
8. **Performance Measurement:** able to measure the quantity, quality, productivity, effectiveness, and efficiency of work output.
9. **Human Resource Management:** able to develop and use procedures for selecting, evaluation, training, and developing employees.
10. **Career Development:** able to organize and plan efforts to achieve a balance between employees career needs and the organization's requirements.
11. **Professional Development:** knowledgeable of training methods or other resources to increase a person's competence in order to improve their current performance or prepare them for promotion.
12. **Delegation Skills:** able to assign task responsibility and authority to others.
13. **Writing Skills:** able to prepare written material that follows generally accepted rules of style and form, is appropriate for the audience, is creative, and accomplishes its intended purpose.
14. **Training and Development:** able to help employees gain the skills and knowledge for performance improvement, and for training and coaching others.
15. **Industrial Understanding:** knowledgeable of the key concepts, critical issues and variables that define an industry or sector.

16. **Statistics:** able to plan and apply evaluation procedures; collect and analyze data; and interpret results.
17. **Computer Competence:** able to understand and use computer applications.
18. **Systems Engineering:** knowledgeable of the concepts, methodologies, models, and tools needed to implement a new system or modify an existing system.

Factor 3: Facilitative/Communication Skills

The professional responsibilities identified within the facilitative/communication skills focus on interpersonal and intrapersonal skills as well facilitation expertise.

Eighteen of the 54 professional responsibilities as rated by the HRD and OD professionals were factored under this category.

1. **Counseling:** able to help individuals evaluate their current behavior and discover more productive behavior patterns.
2. **Coaching:** able to help individuals recognize and understand personal needs, values, problems, alternatives, and goals.
3. **Entry/Contracting:** able to define an organization's problem and establish a collaborative relationship to work these issues.
4. **Adult Learning:** knowledgeable of individual differences in learning and how adults acquire and use competencies.
5. **Theory Building:** able to develop theory from researched data.
6. **Cultural Awareness:** knowledgeable of the major cultural influences on training and development outside of one's culture.
7. **Active Learning:** able to help organizations learn from their actions to include creating entirely new structures.
8. **Motivation Theory:** knowledgeable of the conditions responsible for variation in the intensity, quality, and direction of ongoing behavior.
9. **Sociotechnical Analysis:** knowledgeable of the interface between the technical, linking, and social components of an organization.

10. **Model Building:** able to develop theoretical and practical frameworks that describe complex ideas in simpler, usable ways.
11. **Team Development:** able to help a work group become more effective in accomplishing its tasks and in satisfying the needs of group members.
12. **Trust and Rapport:** able to establish a degree of trust among yourself and others.
13. **Policy Analysis:** able to analyze policies and strategies to insure interventions support the mission and culture of the organization.
14. **Leadership:** knowledgeable of the processes of leadership and how different leadership styles affect group functioning.
15. **Active Listening:** able to hear, understand, remember, and act on information.
16. **Visioning Skill:** able to project trends and visualize possible and probable futures and their implications.
17. **Conflict Management:** able to function as a third-party to achieve effective dialogue between disputants.
18. **Transorganizational Development:** able to guide organizations into partnerships with other organizations to perform tasks or solve problems that are too complex and multifaceted for a single organization to resolve.

Research Question Two

RQ2: Do HRD and OD practitioners and researchers differ in their perceptions of the professional responsibilities?

Null Hypothesis One

H₀1: There is no significant difference between HRD and OD practitioners and researchers and their perception of the factor analysis solution.

Mean scores and standard deviation for the four categories of HR professionals (HRD practitioners, HRD researchers, OD practitioners, and OD researchers) as the independent variables and the three factors (change management, workforce

development, and facilitative/communicative skills) as the dependent variables are shown in Table 6. SPSS MANOVA program analysis was run to test the hypothesis. The Pillais multivariate test was used to determine significance (Hasse & Ellis, 1987). Smith (1995) stated that Pillais is appropriate for most MANOVA situations and Malle (1999) said it is the most conservative. The MANOVA was found to be significant, Pillais = .12, $F_{df(9, 588)} = 2.71$, $p = .004$. This indicated that there was a significant difference between one or more of the three factors.

Three follow-up ANOVAs (Univariate F-tests) with $df(3, 196)$ were conducted to examine the differences in each of the factors. To reduce the possibility of Type I error for univariate tests, a Bonferroni correction (i.e., $.05/3$) was used, which resulted in a critical alpha of .017. Statistically significant ANOVAs were followed-up with Tukey's Honestly Significant Difference (HSD) tests in order to determine which pairs of HR professionals were significantly different from one another. Tukey's HSD test was chosen as the post hoc test because it makes all possible comparisons between pairs, controls for inflation at the alpha level, and provides the most conservative of all available post hoc tests of its kind (Brock, Mintz, & Good, 1997).

A significantly different ANOVA was found to exist only in factor 1 (change management strategies), with $F(3, 203) = 3.63$, and $p = .014$. Tukey's HSD test revealed that the OD researchers differed significantly in their perception of the change management factors from the HRD researchers as well as the HRD practitioners ($p < .05$). No differences existed between the groups regarding either workforce development (factor 2) or facilitative/communication skills (factor 3).

Table 6

Mean Scores of Factor Variables for HRD and OD Professional Groups

Factors	HRD Practitioners (n = 79)		HRD Researchers (n = 36)		OD Practitioners (n = 74)		OD Researchers (n = 20)		F	Sig.
	M	SD	M	SD	M	SD	M	SD		
1	5.89*	.69	5.71	.81	5.85*	.80	5.28	.97	3.63	.013
2	5.32	.80	5.21	.80	5.08	.85	4.90	.65	1.93	.125
3	5.54	.65	5.39	.68	5.66*	.73	5.15*	.88	3.09	.028

Note. Each row of means with asterisks are significantly different from each other at $p < .05$. Factor 1 (change management strategies); factor 2 (workforce development); and factor 3 (facilitative/communication skills). The score for each factor can range from 1 (not important) to 7 (critical).

Research Question Three

RQ3: What are the relationships between the demographic background variables and perceptions of the HRD and OD practitioners and researchers?

This question is best answered through the null hypotheses 2-4.

Null Hypothesis Two

H₀2: There is no relationship between the demographic variables and practitioner perceptions of the factored competencies.

Table 7 shows the correlations between the practitioners' demographics and their perceptions of the three-factored solution. No significant positive relationships were found within the correlated data. However, a significant negative correlation existed between the number of professional association memberships and both the change management and workforce development factors (see column 2 and 3 on table 7). In effect, as the number of professional association memberships increases, the perception of the importance of the factors decreases.

Null Hypothesis Three

H₀3: There is no relationship between the demographic background variables and the researchers' perceptions of the factored competencies.

Table 8 shows the correlations between the researchers' demographics and their perceptions of the three-factor solution. No significant positive relationships were found within the correlated data. However, a significant negative correlation existed between the number of professional association memberships and all three factors: change management, workforce development and facilitative/communication. In effect, as the number of professional association memberships increases, the perception of the

Table 7

Relationship Between Practitioners and Three-Factor Solution

Practitioners' demographics	Change management	Workforce development	Facilitative/ communication
Education level	.132	.114	-.033
Age	-.013	.004	.021
Gender	-.066	-.026	-.182
Years of experience	.089	.004	.076
Association memberships	-.363*	-.228*	-.133
Conferences attended yearly	-.122	-.060	.075

* $p < .05$

Table 8

Relationship Between Researchers and Three-Factor Solution

Researchers' demographics	Change management	Workforce development	Facilitative/ communication
Education level	.020	.006	-.091
Age	-.038	-.007	-.043
Gender	-.113	-.053	-.047
Years of experience	.128	.018	.054
Association memberships	-.401*	-.408*	-.403*
Conferences attended yearly	-.134	-.059	.036

* $p < .05$

importance of all factors decreases.

The commonality between tables 7 and 8 is that the only significant correlations were negative for both practitioners and researchers when compared to the number of professional association memberships. The negative correlations were slightly higher among the researchers and covered all three factors.

Null Hypothesis Four

H₀4: There is no significant difference between the HRD and OD practitioners' and researchers' ratings of the individual professional responsibilities.

ANOVA procedures were applied to each essential competency to ascertain if there were significant differences. When significant differences were discovered, the Tukey HSD procedure was applied to identify the differences between the HRD and OD professionals.

The results of the statistical procedures indicated that there were no significant differences with 37 of the 54 (about 70%) professional responsibilities between the perceptions of HRD and OD professionals. The remaining 17 professional responsibilities showed that significant differences exist between one or more of the professional categories. Thirteen of them involve the organization development researcher (ODR) category.

Table 9

Significant Differences Between the Human Resource and Organization Development Professionals

Competency	ANOVA $\alpha = .05$	Significant Differences
Active listening	$F(3, 204) = 4.91, p = .003, \bar{x} = 6.12$	ODR & HRDP/ODP
Business understanding	$F(3, 205) = 3.13, p = .027, \bar{x} = 5.65$	HRDP & ODR
Cost/benefit analysis	$F(3, 205) = 2.37, p = .072, \bar{x} = 5.42$	HRDP & ODR
Conflict management	$F(3, 205) = 3.47, p = .017, \bar{x} = 5.11$	ODP & HRDR
Cultural awareness	$F(3, 205) = 2.28, p = .080, \bar{x} = 5.24$	HRDR & ODR
Feedback	$F(3, 205) = 3.66, p = .013, \bar{x} = 6.11$	HRDP & ODR
HR management	$F(3, 205) = 3.24, p = .023, \bar{x} = 5.57$	HRDP & ODP
Indust understanding	$F(3, 205) = 5.10, p = .002, \bar{x} = 5.31$	HRDR & ODP
Intellectual versatility	$F(3, 205) = 3.52, p = .016, \bar{x} = 5.78$	ODR & all others
Interview/questioning	$F(3, 205) = 2.99, p = .032, \bar{x} = 5.77$	ODR & HRDP/ODP
Modeling credible beh	$F(3, 204) = 3.33, p = .021, \bar{x} = 6.09$	HRDP & HRDR
Organizational beh	$F(3, 204) = 5.12, p = .002, \bar{x} = 5.76$	ODR and all others
Persuasion	$F(3, 204) = 5.31, p = .001, \bar{x} = 5.30$	ODR & ODP/HRDP
Professional dev	$F(3, 204) = 4.81, p = .003, \bar{x} = 5.64$	ODR & HRDP/R
Role analysis	$F(3, 204) = 3.54, p = .016, \bar{x} = 4.94$	ODR & HRDP/R
Team development	$F(3, 205) = 3.30, p = .021, \bar{x} = 5.75$	ODR & ODP/HRDP
Theory building	$F(3, 205) = 3.00, p = .032, \bar{x} = 4.66$	ODR & HRDP

CHAPTER V

Summary and Conclusions

This chapter contains a summary of the study of the human resource development and organization development professional responsibilities as perceived by practitioners and researchers. The chapter is divided into the following sections: summary of the study, major findings, implications and discussions of the results, recommendations, and conclusions.

Summary of the Study

Purpose of the Study

There has been a tremendous growth in the number of practitioners in the HRD and OD professions. In organizations involved with change, these practitioners are joined by researchers who contribute to the profession by studying organizational, group, and individual change. Fletcher (1990) acknowledged in her qualitative study that there are gaps in current literature concerning specific information about researchers and practitioners (p. 19). Indeed, based on a current review of the literature, there is a scarcity of studies that deal with HRD and OD researchers or the interaction between HRD and OD practitioners and researchers. Most of the current literature focuses solely on practitioners.

Both professions are evolving as a result of major environmental influences to themselves as well as their organizational clients. The impact of these environmental influences affects the professional responsibilities needed by the HRD and OD professional to remain proficient. A review of current literature revealed that the majority of studies dealing with competencies required only a "laundry list" of competencies that

the respondents felt were needed for success. They all carried equal weight. This study investigated the perception of those previously identified competencies by current HRD and OD professionals as to their importance for performing their current and future work. The purpose of this study was three-fold: (a) to develop a researcher/practitioner-validated list of HRD and OD professional responsibilities, (b) to determine whether consensus of the professional responsibilities exists among the HRD and OD researchers and practitioners, and (c) to rate the importance of professional responsibilities as perceived by HRD and OD professionals.

Methods and Procedures

The study used factor analysis and quantitative research methods. The researcher initially identified 117 competencies through a comprehensive review of literature. The number was reduced to 54 through content analysis by a focus group of 7 HRD and OD professionals.

The finalized instrument was forwarded as a survey to randomly selected HRD and OD professionals. The survey instrument measured the variables previously identified in the theoretical framework model: (a) HRD and OD professional responsibilities, (b) demographic characteristics of HRD and OD researchers, and (c) HRD and OD practitioners. There were two sections to the instrument. The first and longest section of the survey instrument contained the alphabetical listing of professional responsibilities. A 7-point Likert scale was used to rate the importance of each competency. The second section was a short query on the self-perception of participants concerning their professional category as either an HRD and OD practitioner or as an HRD and OD researcher and their involvement in continuing professional associations.

The sample for this study consisted of 209 current HRD and OD professionals, which had been randomly selected from seven prominent professional associations: (a) International Society for Performance Improvement, (b) American Society for Training and Development, (c) Academy of Human Resource Development, (d) National Association of Industrial and Technical Teacher Educators, and (e) Organization Development Network. These associations represent an adequate range of HRD and OD professionals currently involved in organizational change. An assumption was made that membership in a professional organization indicates a higher degree of professional development and competence than non-membership.

Data collection procedures consisted of the use of email to forward the survey instrument to each participant. An email response was requested. However, two other options were offered to the participants: fax and regular mail. Email protocol dictates that each participant be contacted for their concurrence prior to sending the survey. A total of 253 participants agreed to take part in the study. Of those agreeing, 209 completed and returned the surveys, yielding a response rate of 83%.

The resultant data were subjected to a variety of statistical procedures. Descriptive statistics were derived for each of the demographic items. The professional responsibilities achieved a reliability coefficient alpha of .9426 through Cronbach's test for internal consistency.

Factor analysis was used to validate and cluster the professional responsibilities into factors in order to address Research Question One. This resulted in three distinct factors of the professional responsibilities. Each factor had an alpha level higher than .86, well within the range for effective instruments.

Major Findings

This section includes findings on the demographic information variables and the three research questions.

Findings Related to Demographic Information

1. An overwhelming majority of the respondents (73%) identified themselves as practitioners, with the category of HRD practitioner having the highest percentage of 38%. The smallest percentage belonged to the OD researchers at 10%. The HRD researcher category was almost 17% of respondents.
2. A preponderance of respondents had masters degree (85) and doctoral degrees (76). They represented more than three-quarters (77%) of the total group. A small percentage (2%) were identified as completing at least two years of college. Only one respondent indicated less than two years of college.
3. By far, the largest age group of respondents were 36 to 55 years of age. This age group contained 64% of the respondents. The 27 to 35 years of age and the over 55 years of age groups were next highest frequencies at 16% and 15%, respectively. No one responded to the lowest age group of 19 years of age and under. The 20 to 26 years age group represented only 2% of the respondents.
4. The majority of the respondents were males but, at 56%, they were not overwhelming when compared to the females.
5. The years of experience had a range of 0 years (5, for 2%) through 42 years (1, for .5%). Five other responses also equaled .5%: one each at 29, 30, 33, 35, and 40. Otherwise, they were fairly evenly distributed. Twenty respondents identified themselves as having 15 years of experience. This represents the highest frequency at 10%. The next highest frequencies were 10 years of experience (9%) and 8 years of experience (7%). The average number of years of experience for the HRD and OD professionals was 11.7.
6. The number of professional association memberships for the respondents ranged from 0 to 11. The average was 3 memberships, with 82% of the respondents identifying between 1 and 4 memberships. The largest frequency (30%) indicated 2 memberships per respondent. Thirteen respondents (6%) indicated that they did not belong to any professional association. The largest number of memberships at 8, 9, and 11 each had a frequency of one (.5%).
7. The average number of professional conferences attended, at 3, was the same as the average number of professional association memberships. The majority

of respondents (72%) indicated that they attended between 1 and 4 conferences within the past year. The largest frequency of 50 (23%) corresponded to 2 conferences. Twenty-four respondents indicated that they did not attend any conferences. Five respondents attended at least 10 conferences within the past year.

Research Findings

1. A ranking of the professional responsibilities by means (Table 4) based on the 7-point Likert scale indicated a range of 6.45 (trust) through a low of 4.01 (facilities management). Designing interventions (6.19), active listening (6.12), managing change (6.12), giving and receiving feedback (6.11), relationship building (6.10), modeling credible behavior (6.09), and presentation skills (6.02) along with trust were the only competencies to be rated above 6.0.
2. Exploratory factor analysis led to a three-factor solution. Each factor contained 18 professional responsibilities. Change management strategies (factor 1) focused on creating readiness for change and helping organizations to overcome resistance to change. Workforce development (factor 2) focused on worker development at organizational, group and individual levels. Facilitative/communication skills (factor 3) focused on interpersonal /intrapersonal skills and facilitation expertise.
3. There was no significant difference between the HRD and OD professionals (human resource development practitioners, human resource development researchers, organization development practitioners, or organization development researchers) in their perceptions of workforce development (factor 2) and facilitative/communication skills (factor 3). There was, however, a significance difference in their perceptions of change management strategies (factor 1). Further investigation revealed that the differences were between two sets of HRD and OD professionals. First, there were significant differences between the HRD practitioners and the OD researchers, as well as between the OD practitioners and the OD researchers. The commonality between both sets are the OD researchers.
4. There were significant differences between the level of education of HRD and OD professionals. The differences were between the OD practitioners and both groups of researchers. The OD practitioners had the lowest mean of the groups (3.7). There was also a significant difference between the HRD practitioners and the HRD researchers. The mean education level of both groups of researchers (4.7 for HRD and 4.4 for OD) indicated a higher level of education when compared to the practitioners (3.9 and 3.7 respectfully). The OD researcher respondents ranged from bachelor's degree through doctoral

degree, while the HRD researcher range was narrower with some graduate work through doctoral degree. Both the HRD and OD practitioner groups represented the entire level of education range from at least two years of college through doctoral degree.

5. Each of the 54 professional responsibilities were compared to the HRD and OD professionals to ascertain if significant differences existed. The results indicated that with 37 of the 54 professional responsibilities there were no significant differences (Table 9).

Implications and Discussions of the Results

The implications of this study are derived from the Human Resource Development and Organization Development Competency Instrument and the analysis of the HRD and OD professional's demographic data. To the extent that the data and findings were valid and reliable, the implications of the study are as follows:

1. This study supports the idea that there is an overlapping interdependence between HRD and OD professionals as acknowledged by Dayal (1989) and Beer and Walton (1987). While there were many more researchers than practitioners (153 and 56 respectively) the split between the HRD and OD practitioners was much closer (115 to 94, respectively). There was nothing, except the sample size, that indicated major differences in the manner in which each of the four professional groups responded to the survey.
2. Job titles were also requested from the participants. A review indicated that the majority of those with the same job title selected the practitioner category over that of researcher. This may be the basis for a future study. The common thought is that practitioners "do" and researchers "think" (Fletcher, 1990). Cummings and Worley (1997) described practice as "social action" and research as "inquiry." It would appear that being listed as a researcher is not indicative of taking an active part in the profession. In Fletcher's qualitative study of 14 HRD and OD professionals, seven (50%) claimed to be solely practitioners while only one indicated that he or she was a researcher. Fulmer (1995) noted that many academicians are moving to bridge the "gap" between the creative thinking done in academic institutions and the applied practice of the business world. This may have also affected the size of the practitioner categories.
3. An implication of this study supports Hiatt's (1989) claim that many of the identifiable competencies between the HRD and OD professions are similar.

Seventy percent of all identified professional responsibilities were agreed upon by all four HRD and OD professional groups. When there were differences, the majority of them involved the OD practitioners as reported in table 9. This may have been because this was the smallest group and it was the only group that contained more females than males. It is worthy of consideration for a future study.

4. This study provides profile information on practitioners and researchers. It responds to Fletcher's (1990) accusation that there are gaps in literature concerning data on practitioners and researchers. The study details the respondents' age, gender, years of experience, level of education, professional association memberships, and professional conferences attended. Furthermore, it divides both practitioners and researchers into HRD and OD professionals.
5. Most of the current literature focuses on practitioners, but few studies are empirical in nature (Cummings & Worley, 1997). This study provides some empirical data not only for practitioners but for researchers as well.
6. This study has developed an HRD and OD professional-validated instrument that can be used to collect data on the perceptions of the current HRD and OD workforce. The instrument can be applied to any size organization/institution. This study can be used as a baseline for organizations to compare findings. A major premise of this study is that HRD and OD professions are affected by changes in the environment. With that in mind, the instrument can be updated as needed.
7. This study provided a prioritized listing (by means) of HRD and OD professional responsibilities as shown in Table 2. It gives insight into those competencies viewed as important to achieve success in the profession. As previously reported, the highest ranked essential competency was "trust." This is a knowledge-based, intangible competency (as opposed to a skill competency). It should be one of the basic competencies used to develop future HRD and OD leaders.

Recommendations

In view of the findings and the implications of the results, the following recommendations are offered.

1. The findings of this study should be used by professional associations to develop the content of their continuing professional education programs that are important for the training and education of HRD and OD professionals.

2. Those HRD and OD professionals concerned with self-efficacy and the professional development of their own careers can use the results of this study to determine which competencies they lack. They will be able to sequence the attainment of the competencies based upon the level of importance assigned to them.
3. Post-secondary institutions can use these findings to develop HRD and OD curriculums for both undergraduate and graduate programs. This will enable students to enter the workforce confident that they have attained the competencies necessary for success in the profession.
4. HRD and OD organizations can use the survey instrument to ascertain the perceptions of their professionals. They can compare their results to the results attained in this study or compare them to the organization's strategy, vision, goals, and culture. They can also use the procedures of this study to create a hybrid survey instrument that would measure a specialized area of interest.
5. Future studies are needed to assess the relationships between practitioners and researchers. They not only do things differently, they value and perceive things differently as well (McKeon, 1947).

Conclusions

This study was unique in that email was the primary data collection method. The survey instrument was forwarded by email to all participants, including the pilot group. Although email was encouraged for use to return the survey, other traditional methods (fax and regular mail) were offered as alternatives and used by 27 respondents.

This study provided information about the professional responsibilities currently needed by HRD and OD practitioners and researchers. The professionals were divided into four categories: human resource development practitioners, human resource development researchers, organization development practitioners, and organization development researchers. The competencies were selected from prior studies and other related literature. They were grouped into three factors: change management strategies, workforce development, and facilitative/communication skills. The areas of interest were

the perceptions of the HRD and OD practitioners and researchers regarding the importance of the competencies individually and collectively. This study has provided information which should expand the body of knowledge in the both professions.

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APPENDICES

APPENDIX A

LETTER TO SOLICIT
PANEL OF EXPERTS

(Sample of e-mail to panel members)

Date:

From:

To:

Subject: Panel of Experts for HRD and OD Professional responsibilities

As part of my doctoral work in the Department of Human Resource Development at The University of Tennessee-Knoxville, I am conducting research on the professional responsibilities needed by HRD and OD professionals. I am requesting your help, as an experienced HRD and OD professional to participate as a panel member and validate a listing of competencies that I compiled from an extensive literature review. Specifically, I would like you to review the listing and accept, delete, combine, or edit each competency. Your input will be used to insure completeness and clarity of my survey instrument.

This panel review process will function as a focus group activity. Therefore the group will consist of seven prominent, highly experienced HRD and OD professionals (as yourself) and our meeting will take no longer than 90 minutes. With your concurrence, I will personally deliver the panel review package to you. It contains the list of competencies, their source, and their definition as used in this study.

Believe me when I say that your participation is crucial to the success of my study. If you can participate in this endeavor, please let me know by replying via e-mail as soon as reasonably possible. At that time, I will make arrangements to deliver the package to you.

I would like to set up our meeting at the Old Country Buffet on Kingston Pike (my treat, of course) Wednesday, July 8, 1998, around 5:30 p.m. Let me know if this is a good time for you.

Robert T. Nora

APPENDIX B

OVERVIEW OF STUDY FOR THE PANEL OF EXPERTS

The Professional Responsibilities of
Human Resource and
Organizational Development Professionals

The purpose of this study is to develop a researcher/practitioner-validated list of professional responsibilities of the HRD and OD professions. The professional responsibilities were derived from recent literature and studies on the HRD and OD profession. They represent the competencies needed by the HRD and OD professionals to perform their current and future work. This study is framed within the knowledge that HRD and OD professions are still emerging fields. This study will also investigate the profession from both practitioner and researcher viewpoints and obtains their view of the impact of continuing professional education through professional associations.

This study will provide insight for researchers, practitioners, faculty, and administrators in the HRD and OD professions. Primarily, it can be used to develop a competency job profile for the entire HRD and OD professions. The job profile refers to a complete set of competencies that are identified and prioritized by professionals currently active in the field.

APPENDIX C

ORIGINAL LIST OF PROFESSIONAL RESPONSIBILITIES AND DEFINITIONS

Original list of professional responsibilities

- 1 **Action research:** Cyclical process of diagnosis-change-research-diagnosis-change-research. The results of diagnosis produce ideas for changes; the changes are introduced into the same system, and their results are noted through further research cycles. Shepard & Raia, 1981

- 2 **Active learning:** Form of action research in which the focus is on helping organizations learn from their actions how to create entirely new structures. Involves considerable trial and error learning. Shepard & Raia, 1981

- 3 **Adult development:** Organized, formalized, planned effort to achieve a balance between an individual's career needs and the organization's work force requirements. Shepard & Raia, 1981

- 4 **Adult learning:** Knowing how adults acquire and use competencies; understanding individual differences in learning. McLagan, 1989

- 5 **Advanced statistics:** Planning the evaluation procedures, analyzing the data, and interpreting the results. Shepard & Raia, 1981

- 6 **Business understanding:** Knowing how the functions of a business work and relate to each other; including knowing the economic impact of business decisions. McLagan, 1989

- 7 **Career development theories:** Knowing the techniques and methods used in career development; understanding their appropriate uses. McLagan, 1989

- 8 **Case method research:** Non-directive training techniques consisting of problem-solving exercises, case studies, and simulations. Shepard & Raia, 1981

- 9 **Coaching:** Helping individuals recognize and understand personal needs, values, problems, alternatives, and goals. Dyer, 1997; Hiatt, 1989; McLagan, 1989; Shepard & Raia, 1981

- 10 **Communication:** The process by which senders and receivers of messages transfer information and understanding. Shepard & Raia, 1981

- 11 **Communication theory-based:** Understanding that effective communication can reduce the anxiety associated with change. Shepard & Raia, 1981

- 12 **Competency identification:** Identifying the competency requirements of jobs, tasks, and roles. McLagan, 1989

- 13 **Computer competence:** Understanding and/or using computer applications. McLagan, 1989; Shepard & Raia, 1981

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| 14 | Conceptual and analytical skills: The mental ability to analyze and diagnose complex situations. Shepard & Raia, 1981 |
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| 15 | Conflict resolution: Utilization a third-party to achieve effective dialogue between disputants so they can examine their differences and change behaviors. Shepard & Raia, 1981 |
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| 16 | Cost-benefit analysis: Assessing alternatives in terms of their financial, psychological, and strategic advantages and disadvantages. McLagan, 1989 |
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| 17 | Counseling: A particular type of coaching that helps individuals evaluate their current behavior and discover and learn more productive behavior patterns. Dyer, 1997; Hiatt, 1989; Shepard & Raia, 1981 |
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|----|--|
| 18 | Cross-cultural: Understanding relationships required when working with people who live and work in foreign cultures. Shepard & Raia, 1981 |
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| 19 | Cultural anthropology: Understanding the major cultural influences on training outside of one's culture. Shepard & Raia, 1981 |
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|----|---|
| 20 | Data reduction skill: Scanning, synthesizing, and drawing conclusions from data. McLagan, 1989 |
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- | | |
|----|---|
| 21 | Delegation skill: Assigning task responsibility and authority to others. McLagan, 1989 |
|----|---|
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- | | |
|----|--|
| 22 | Designing interventions: Crafting a change effort or program that will be consistent with the organization's goals and culture. Constantine, 1991; Dyer, 1997; Shepard & Raia, 1981 |
|----|--|
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- | | |
|----|---|
| 23 | Diagnostic research: Collecting data in order to analyze training needs. The emphasis is on problem identification than on solutions. Shepard & Raia, 1981 |
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|----|---|
| 24 | Economics: Understanding the relationship between costs in development, presentation, and overhead to the benefit of the organization and/or the trainee. Shepard & Raia, 1981 |
|----|---|
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- | | |
|----|---|
| 25 | Electronic systems: Having knowledge of functions, features, and potential applications of electronic systems for delivery and management of HRD (i.e. computer-based training, teleconferencing). McLagan, 1989 |
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- | | |
|----|--|
| 26 | Elementary statistics: Collecting, organizing, describing, and analyzing data. Shepard & Raia, 1981 |
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|----|---|
| 27 | Entrepreneurial: Applying innovative techniques for meeting kinds of demands. Dyer, 1997; Shepard & Raia, 1981 |
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| 28 | Entry/contracting: Defining the organization's problem or opportunity for development and establishing a collaborative relationship to work on these issues. Shepard & Raia, 1981 |
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|----|---|
| 29 | Evaluation research: Obtaining information about the overall effects of a change program. Shepard & Raia, 1981 |
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|----|--|
| 30 | Facilities management: Planning and coordinating logistics in an efficient and cost-effective manner. McLagan, 1989 |
|----|--|
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- | | |
|----|---|
| 31 | Financial management: Understanding the decision-making procedures that support consistent, fair, and rational determination of resource allocation priorities. Shepard & Raia, 1981 |
|----|---|
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- | | |
|----|---|
| 32 | Giving and receiving feedback: Communicating information, opinions, observations, and conclusions so that they are understood and can be acted upon. McLagan, 1989; Shepard & Raia, 1981 |
|----|---|
-
- | | |
|----|--|
| 33 | Graphic and audiovisual: Developing top-quality graphics and text, with both illustrations and color. Utilizing interactive multimedia programs. Shepard & Raia, 1981 |
|----|--|
-
- | | |
|----|--|
| 34 | Group dynamics and processing: Influencing groups so that tasks, relationships, and individual needs are addressed. McLagan, 1989; Shepard & Raia, 1981 |
|----|--|
-
- | | |
|----|---|
| 35 | Human resource management: Mechanisms and procedures for selecting, training, and developing employees. Shepard & Raia, 1981 |
|----|---|
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- | | |
|----|--|
| 36 | Industrial psychology: Applying the methods, facts, and principles of the science of psychology to people at work. Shepard & Raia, 1981 |
|----|--|
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- | | |
|----|---|
| 37 | Industrial understanding: Knowing the key concepts and variables such as critical issues, economic vulnerabilities, measurements, distribution channels, inputs, outputs, and information sources that define an industry or sector. McLagan, 1989 |
|----|---|
-
- | | |
|----|---|
| 38 | Information searching: Gathering information from printed and other recorded sources; identifying and using information specialists and reference services and aids. McLagan, 1989 |
|----|---|
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- | | |
|----|--|
| 39 | Information systems: Understanding the concepts of the different types of information available, how to assess its value, and applying it to the profession. Shepard & Raia, 1981 |
|----|--|
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- | | |
|----|--|
| 40 | Integrity: Utilizing honesty and personal character behavior that underlies ethical action. Hiatt, 1989; Shepard & Raia, 1981 |
|----|--|
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-
- 41 **Intellectual versatility:** Recognizing, exploring, and using a broad range of ideas and practices; thinking logically and creatively without undue influence from personal biases. McLagan, 1989
-
- 42 **Intergroup dynamics:** Helping two groups or departments within an organization resolve dysfunctional conflicts. Improving interactions between different groups or departments. Buch & Aldridge, 1991; Shepard & Raia, 1981; Varney, 1996
-
- 43 **International business:** Understanding the culture, diversity, and legalities of working in and with a multiculture organization. Shepard & Raia, 1981
-
- 44 **Interpersonal:** Creating and maintaining effective relationships with individuals and groups within an organization. Cummings & Worley, 1993; Varney, 1996
-
- 45 **Interviewing/questioning:** Gathering information from stimulating insight in individuals and groups through the use of interviews, questionnaires, and other probing methods. McLagan, 1989; Shepard & Raia, 1981
-
- 46 **Intragroup dynamics:** Understanding and resolving conflicts within a particular group. Shepard & Raia, 1981
-
- 47 **Intrapersonal:** Processing complex, ambiguous information and making informed judgments about its relevance to organizational issues. Cummings & Worley, 1993; Varney, 1996
-
- 48 **Job design:** Organizing tasks, duties, and responsibilities into a work unit. Shepard & Raia, 1981
-
- 49 **Job measurement:** Determining the quantity, quality, productivity, effectiveness, and efficiency of work output. Shepard & Raia, 1981
-
- 50 **Languages and non-verbal cross-cultural:** Being emphatic to the difficulties that people experience when they are trying to speak and listen in a foreign language. Shepard & Raia, 1981
-
- 51 **Large systems change theory:** Understanding the organization-environment relationship (open systems theory) and the organizational structure (internal fit). Shepard & Raia, 1981
-
- 52 **Leadership:** Understanding the processes of leadership and how different leadership styles can help or hinder a groups functioning. Shepard & Raia, 1981; Varney, 1996
-
- 53 **Learning theories:** Understanding the concepts that lead to permanent change in skills, knowledge, and attitude. Shepard & Raia, 1981; Varney, 1996
-

54	Legal and social environment: Understanding professional and training liability, gross negligence, malpractice, realities of assessing risks, and managing legal compliance in regulated work environments. Shepard & Raia, 1981
55	Listening: Hearing, understanding, remembering, and acting on information. Shepard & Raia, 1981
56	Management development: Training or other processes to increase managers' knowledge or skills in order to improve performance in present jobs or prepare them for promotion. Shepard & Raia, 1981
57	Management policy/strategy: Understanding how organizations analyze and plan to respond to changing external environmental conditions. Shepard & Raia, 1981
58	Managerial accounting: Applying cost accounting concepts to managerial theory and practice; including forecasting and budgeting. Shepard & Raia, 1981
59	Managing change process: Planning, implementing, and motivating the changes necessary to improve organization effectiveness and performance. Constantine, 1991; Shepard & Raia, 1981
60	Manufacturing r&d: Assessing the environment, resources, and competitive nature of the industry in which a firm operates. Determining the firm's new product needs. Shepard & Raia, 1981
61	Marketing: Understanding the concepts of market research, developing a marketing plan and sales forecasting. Shepard & Raia, 1981
62	Mergers and acquisitions: Understanding the practices of negotiated acquisitions, mergers, leveraged buy-outs, going private transactions, purchases and sales of divisions and subsidiaries and reorganizations. Constantine, 1991
63	Model building: Conceptualizing and developing theoretical and practical frameworks that describe complex ideas in understanding, usable ways. McLagan, 1989
64	Modeling credible behaviors: Behaving in ways that are credible to the organization members. Serving as concrete role models. Hiatt, 1989; Shepard & Raia, 1981
65	Motivation theory: Understanding the conditions responsible for variation in the intensity, quality, and direction of ongoing behavior. Shepard & Raia, 1981; Varney, 1996
66	Negotiation: Securing win-win agreements while successfully representing a special interest in a decision. McLagan, 1989; Shepard & Raia, 1981

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- 67 **Objectives preparation:** Preparing clear statements that describe desired outputs. McLagan, 1989
-
- 68 **Observing skills:** Recognizing objectively what is happening in or across situations. McLagan, 1989
-
- 69 **OD theory:** Knowing the techniques and methods used in OD; understanding their appropriate use. Cummings & Worley, 1993; McLagan, 1989; Shepard & Raia, 1981
-
- 70 **Open systems:** Taking into account the relationships between a system and its environment. This refers to the nature and functions of transactions that take place between a system and its environment. Shepard & Raia, 1981
-
- 71 **Operations research:** Applying mathematical models to managerial problems. Shepard & Raia, 1981
-
- 72 **Organization behavior:** Seeing organizations as dynamic, political, economic, and social systems that have multiple goals; using this larger perspective as a framework for understanding and influencing events and change. McLagan, 1989
-
- 73 **Organization design:** Bringing about a coherence or fit among organizational choices about strategy, organizing mode, and mechanisms for integrating people into the organization. Dyer, 1997; Shepard & Raia, 1981; Varney, 1996
-
- 74 **Organization theory:** Understanding the degree to which the organization or client system is organized including leadership, communications, policies, procedures, and practices. Dyer, 1997; Shepard & Raia, 1981; Varney, 1996
-
- 75 **Organization understanding:** Knowing the strategy, structure, power networks, financial position, and systems of a specific organization. McLagan, 1989
-
- 76 **Organizational diagnosis:** Collaborative process between organizational members and the OD specialist to collect pertinent information, analyze it, and draw conclusions for action planning and intervention. Shepard & Raia, 1981
-
- 77 **Performance appraisal:** A human resource system designed to provide feedback to an individual or group about its performance. Shepard & Raia, 1981
-
- 78 **Performance observation:** Tracking and describing behaviors and their effects. McLagan, 1989
-
- 79 **Personal centering:** Staying in touch with one's own purpose and values. Shepard & Raia, 1981; Varney, 1996
-

80	Personal stress management: Diagnosing the cause and symptoms of stress and taking action to alleviate the causes and to improve one's ability to deal with stress. Shepard & Raia, 1981
81	Personality theory: Being knowledgeable about personality models and how personality theories can be useful in understanding individual differences and behavior. Shepard & Raia, 1981; Varney, 1996
82	Persuasion: Influencing and shaping the behavior of other. Shepard & Raia, 1981
83	Policy analysis: Analyzing policies and strategies to insure training solutions support the mission and culture of the organization. Shepard & Raia, 1981
84	Political influence and selling: Identifying the individuals and groups that can block or promote change; gaining their support to implement changes. Shepard & Raia, 1981
85	Power: Ability to influence others so that one's values are satisfied. Understanding the sources of power. Shepard & Raia, 1981; Varney, 1996
86	Presentation skills: Presenting information orally so that an intended purpose is achieved. McLagan, 1989
87	Process consultation: Set of activities used by an OD specialist to help group members gain the skills and understanding necessary to identify and solve problems themselves. Cummings & Worley, 1993; Hiatt, 1989; Shepard & Raia, 1981
88	Production/operations management: Understanding the design, operation and improvement of the production of goods and services. Shepard & Raia, 1981
89	Project management: Planning, organizing, and monitoring work. McLagan, 1989
90	Proposal and report writing: Communicating your requests, findings, updates, and other information through writing. Shepard & Raia, 1981
91	Psychopathology and therapy: Understanding the physical complaints and treatments caused by or related to emotional factors such as job stress. Shepard & Raia, 1981
92	Public speaking and lecturing: Communicating your requests, findings, updates, and other information through oral presentation. Shepard & Raia, 1981
93	Quantitative methods: Analyzing data from simple descriptive statistics to multivariate analysis and relationships among variables. Shepard & Raia, 1981

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- 94 **Questionnaire design/use:** A data collection method consisting of written questions and survey responses in order to solicit subjective opinions. Shepard & Raia, 1981
-
- 95 **Rational emotive balance:** Understanding your own values, feelings, and purposes. Shepard & Raia, 1981
-
- 96 **Records management:** Storing data in an easily retrievable format. McLagan, 1989
-
- 97 **Relationship building:** Establishing relationships and networks across a broad range of people and groups. McLagan, 1989
-
- 98 **Research interviewing:** Asking a respondent direct questions to gain private views and feelings about an organization. Shepard & Raia, 1981
-
- 99 **Research skills:** Selecting, developing, and using methods such as statistical and data collection techniques for formal inquiry. McLagan, 1989
-
- 100 **Reward systems:** Designing organizational rewards to improve employee satisfaction and performance. Shepard & Raia, 1981
-
- 101 **Role analysis:** Defining the sum total of expectations that an individual and others have about to perform a specific job. The employee must be able to integrate the expectations into a meaningful whole to perform the role effectively. Buch & Aldridge, 1991; Shepard & Raia, 1981; Varney, 1996
-
- 102 **Self-knowledge:** Knowing one's personal values, needs, interests, style, and competencies, and their effects on others. McLagan, 1989
-
- 103 **Social psychology:** Understanding the activities and feelings of group members toward one another. Shepard & Raia, 1981
-
- 104 **Sociotechnical analysis:** A form of organizational analysis that looks at the interface between the technical, linking, and social components. Shepard & Raia, 1981
-
- 105 **Speaking client's language:** Becoming familiar with the clients' business to effectively communicate with the client. Shepard & Raia, 1981
-
- 106 **Subject matter understanding:** Knowing the content of function of a given function or discipline being addressed. McLagan, 1989
-
- 107 **Systems engineering/analysis:** Being familiar with the concepts, methodologies, models and tools needed to understand and implement the systems approach. Shepard & Raia, 1981
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- 108 **Team building:** Helping a work group to become more effective in accomplishing its tasks and in satisfying the needs of group members. Constantine, 1991
-
- 109 **Telephone intervention:** Use of the telephone to circumvent potential negative situations and facilitating behavior. Shepard & Raia, 1981
-
- 110 **Theory building research:** Developing theory from researched data. Shepard & Raia, 1981
-
- 111 **Training/development theories:** Knowing the theories and methods used in training; understanding their appropriate use. McLagan, 1989
-
- 112 **Training skills:** Helping employees to gain the skills and knowledge for performance improvement, and for training and coaching others. Shepard & Raia, 1981
-
- 113 **Transorganizational development:** Helping organizations to join into partnerships with other organizations to perform tasks or solve problems that are too complex and multifaceted for single organizations to resolve. Shepard & Raia, 1981
-
- 114 **Trust and rapport:** Establishing a degree of trust among yourself and others. Shepard & Raia, 1981
-
- 115 **Unobtrusive measures:** Collecting data from secondary sources, such as personnel records, previous surveys, and historical archives. Shepard & Raia, 1981
-
- 116 **Visioning skill:** Projecting trends and visualizing possible and probable futures and their implications. McLagan, 1989
-
- 117 **Writing skill:** Preparing written material that follows generally accepted rules of style and form, is appropriate for the audience, is creative, and accomplishes its intended purpose. McLagan, 1989
-

APPENDIX D

HUMAN RESOURCE DEVELOPMENT AND ORGANIZATION DEVELOPMENT PROFESSIONAL RESPONSIBILITIES AND SOURCES

HRD/OD professional responsibilities and source

Responsibilities	Shepard & Raia	Varney	Hiett	Cummings & Worley	Dyer	Buch & Aldridge	Constantine	McLagan
1 action research	X							
2 active learning	X							
3 adult development	X							
4 adult learning/understanding								X
5 advance statistics	X							
6 business understanding								X
7 career development theories								X
8 case method research	X							
9 coaching	X		X		X			X
10 communication	X							
11 communication theory- based	X							
12 competency identification								X
13 computer competence	X							X
14 conceptual analytical	X							
15 conflict resolution	X							

Responsibilities	Shepard & Raia	Varney	Hiett	Cummings & Worley	Dyer	Buch & Aldridge	Constantine	McLagan
16 cost-benefit analysis								X
17 counseling	X		X		X			
18 cross-cultural	X							
19 cultural anthropology	X							
20 data reduction skill								X
21 delegation skill								X
22 designing interventions	X				X		X	
23 diagnostic research	X							
24 economics	X							
25 electronic systems								X
26 elementary statistics	X							
27 entrepreneurial	X				X			
28 entry/contracting	X							
29 evaluation research	X							
30 facilities management								X
31 financial management	X							

Responsibilities	Shepard & Raia	Varney	Hiett	Cummings & Worley	Dyer	Buch & Aldridge	Constantine	McLagan
32 giving and receiving feedback	X							X
33 graphic and audio visual	X							
34 group dynamics/processing	X							X
35 human resource management	X							
36 industrial psychology	X							
37 industrial understanding								X
38 information searching								X
39 information systems	X							
40 integrity	X		X					
41 intellectual versatility								X
42 intergroup dynamics	X	X				X		
43 international business	X							
44 interpersonal		X		X				
45 interviewing/questioning	X							X
46 intragroup dynamics	X							

Responsibilities	Shepard & Raia	Varney	Hiett	Cummings & Worley	Dyer	Buch & Aldridge	Constantine	McLagan
47 intrapersonal		X		X				
48 job design	X							
49 job measurement	X							
50 language and non-verbal cross-cultural	X							
51 large systems change theory	X							
52 leadership	X	X						
53 learning theories	X	X						
54 legal and social environment	X							
55 listening	X							
56 management development	X							
57 management policy/strategy	X							
58 managerial accounting	X							
59 managing change process	X						X	
60 manufacturing r&d	X							
61 marketing	X							
62 mergers and acquisitions							X	

Responsibilities	Shepard & Raia	Varney	Hiett	Cummings & Worley	Dyer	Buch & Aldridge	Constantine	McLagan
63 model building								X
64 modeling credible behaviors	X		X					
65 motivation theory	X	X						
66 negotiation	X							X
67 objectives preparation								X
68 observing skills								X
69 OD theory	X			X				X
70 open systems	X							
71 operations research	X							
72 organization behavior								X
73 organization design	X	X			X			
74 organization theory	X	X			X			
75 organization understanding								X
76 organizational diagnosis	X							
77 performance appraisal	X							
78 performance observation								X
79 personal centering	X		X					

Responsibilities	Shepard & Raia	Varney	Hiett	Cummings & Worley	Dyer	Buch & Aldridge	Constantine	McLagan
80 personal stress management	X							
81 personality theory	X	X						
82 persuasion	X							
83 policy analysis	X							
84 political influence and selling	X							
85 power	X	X						
86 presentation skills								X
87 process consultation	X		X	X				
88 production/operations mgt	X							
89 project management								X
90 proposal and report writing	X							
91 psychopathology and therapy	X							
92 public speaking and lecturing	X							
93 quantitative methods	X							
94 questionnaire design/use	X							

Responsibilities	Shepard & Raia	Varney	Hiett	Cummings & Worley	Dyer	Buch & Aldridge	Constantine	McLagan
95 rational emotive balance	X							
96 records management								X
97 relationship building								X
98 research interviewing	X							
99 research skills								X
100 reward systems	X							
101 role analysis	X	X				X		
102 self-knowledge								X
103 social psychology	X							
104 sociotechnical analysis	X							
105 speaking client's language	X							
106 subject matter understanding								X
107 systems engineering/analysis	X							
108 team building							X	
109 telephone intervention	X							
110 theory building research	X							

Responsibilities	Shepard & Raia	Varney	Hiett	Cummings & Worley	Dyer	Buch & Aldridge	Constantine	McLagan
111 training/development theory								X
112 training skills	X							
113 transorganizational theory	X							
114 trust and rapport	X							
115 unobtrusive measures	X							
116 visioning skill								X
117 writing skill								X

APPENDIX E

LETTER TO PANEL
REQUESTING SECOND REVIEW

Date:
From:
To: Panel of Experts for HRD and OD Professional Responsibilities
Subject: Human Resource Development and Organization Development
Survey Instrument

Hello Panel Members,

Thanks again for your comments and inputs. I have made some significant modifications to the format of the survey. I was able to edit and delete some of the competencies. I was also able to edit and delete some of the redundant competencies. Since there was such a significant revision to the original list of competencies, I would like you to take a final review before I finalize and forward the survey. Your continued participation remains very important to the success of this endeavor.

Mark either "acceptable", "delete", or "edit" for each competency. If you choose edit, please annotate your remarks next to the competency.

APPENDIX F

LETTER OF INTEREST
FOR SURVEY PARTICIPANTS

From: tenora@ruby.indstate.edu
To:
Subject: HRD and OD Professional Competency Rankings

As part of my doctoral work in the Department of Human Resource Development at The University of Tennessee-Knoxville, I am conducting research on the professional responsibilities of the HRD and OD professions. I would like to ask for your help in ranking these competencies via my Human Resource and Organization Development Professional Responsibilities Instrument. Time needed to complete the inventory would be approximately 20 minutes.

With your permission, you will receive the survey through e-mail shortly. Individual responses will be kept in the highest confidence. Survey findings will be made available to all respondents. The findings will be used in my doctoral dissertation at The University of Tennessee.

Please reply to me directly as soon as reasonably possible.
Thank you.

Robert T. Nora, ABD
Assistant Professor
Department of Industrial Technology Education
School of Technology
Indiana State University
Terre Haute, IN 47809

APPENDIX G
SURVEY COVER LETTER

From: tenora@ruby.indstate.edu
To:
Subject: Human Resource Development and Organizational Development
Professional Responsibilities Survey

Dear Survey Member,

Thank you for your willingness to participate as a valued survey member for this HRD and OD Professional Responsibilities Survey. Please complete the survey and return your input as soon as possible but no later than Friday, ...midnight.

(Note: The survey was not e-mailed as an attachment. It was a part of this cover letter).

APPENDIX H

SECOND REQUEST TO
SURVEY PARTICIPANTS

From: tenora@ruby.indstate.edu
To:
Subject: Human Resource Development and Organizational Development
Professional Responsibilities Survey

Dear Survey Member,

This winter you committed to participating in a survey on HRD and OD professional responsibilities. I have not yet received your response. If you are still interested in participating in my HRD and OD Professional Responsibilities Survey, I would like to have your input. Please complete the survey and return your input as soon as reasonably possible but no later than Friday, ...midnight.

APPENDIX I
LETTER OF THANKS

From: tenora@ruby.indstate.edu>
To:
Subject: HRDODCI Survey

Thank you for your prompt response. I will forward the study abstract to you shortly after the study is completed.

Rob Nora

APPENDIX J

THE HUMAN RESOURCE DEVELOPMENT
AND ORGANIZATION DEVELOPMENT
PROFESSIONAL RESPONSIBILITIES
INVENTORY

The Human Resource Development and Organization
Development Professional Responsibilities Inventory

For Your Information:

1) In this study a professional responsibility is defined as an area of knowledge or skill which is required for success within a profession.

2) Purpose of the Study:

To develop a practitioner/researcher-validated list of professional responsibilities for the HRD and OD professions.

Directions:

There are three ways to respond to this survey: 1) complete the survey online and use the reply function of your e-mail system; 2) export the e-mail message to a word processing format, complete it, return it to an e-mail format, and forward it to me; and 3) print the survey, complete it and either fax or mail it to me.

e-mail: tenora@ruby.indstate.edu

fax: Rob Nora 812-237-2655

mail: Rob Nora, ABD

Assistant Professor

Department of Industrial Technology Education

School of Technology

Indiana State University

Terre Haute, IN 47809

There are seven possible choices on the survey for each listed competency. The choices range from 1) Not Important through 7) Critical.

I appreciate your willingness to participate in this study and look forward to hearing from you.

How would you rate the importance of these professional responsibilities needed by HRD and/or OD professionals? (Place your rating on the blank line next to each competency).

The HRD and OD professional will be:

- _____ 1. able to help organizations learn from their actions to include
 creating entirely new structures (active learning)
 (Not Important) 1 2 3 4 5 6 7 (Critical)

- _____ 2. able to hear, understand, remember, and act on information
 (active listening)
 (Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 3. knowledgeable of individual differences in learning and how
 adults acquire and use competencies (adult learning)
 (Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 4. knowledgeable of how the functions of a business work and relate
 to each others (business understanding)
 (Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 5. able to organize and plan efforts to achieve a balance between
 employees career needs and the organization's requirements (career
 development)
 (Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 6. able to help individuals recognize and understand personal needs,
 values, problems, alternatives, and goals (coaching)
 (Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 7. able to identify the competency requirements of jobs, tasks, and
 roles (competency identification)
 (Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 8. able to understand and use computer applications (computer
 competence)
 (Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 9. able to function as a third-party to achieve effective
 dialogue between disputants (conflict management)
 (Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 10. able to assess alternatives in terms of their financial,
 psychological, and strategic outcomes (cost-benefit analysis)
 (Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 11. able to help individuals evaluate their current behavior and
 discover more productive behavior patterns (counseling)
 (Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 12. knowledgeable of the major cultural influences on training and
 development outside of one's culture (cultural awareness)
 (Not Important) 1 2 3 4 5 6 7 (Critical)

- _____ 13. able to assign task responsibility and authority to others
(delegation)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 14. able to develop a change effort, intervention, or program that
will be consistent with organization's goals and create desired
results (designing interventions)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 15. able to collect data in order to analyze intervention needs.
Emphasis is on problem identification (diagnostic research)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 16. able to define an organization's problem and establish a
collaborative relationship to work these issues
(entry/contracting)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 17. able to plan for and effectively use physical facilities
(facilities management)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 18. able to communicate information, opinions, observations, and
conclusions so that are understood and can be acted upon (giving
and receiving feedback)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 19. able to influence groups so that tasks, relationships, and
individual needs are addressed (inter/intra group dynamics)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 20. able to develop and use procedures for selecting, evaluation,
training, and developing employees (human resource management)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 21. knowledgeable of the key concepts, critical issues and variables
that define an industry or sector (industrial understanding)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 22. able to recognize, explore, and use a broad range of ideas and
practices; thinking logically and creatively without undue
influences from personal biases (intellectual versatility)
(Not Important) 1 2 3 4 5 6 7 (Critical)

- _____ 23. able to gather information through the use of interviews, questionnaires, and other probing methods (interviewing)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 24. able to organize tasks, duties, and responsibilities into a work unit (job design)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 25. knowledgeable of the processes of leadership and how different leadership styles affect group functioning (leadership)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 26. knowledgeable of professional liability and malpractice, as well as legal compliance in regulated work areas (legal environment)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 27. able to plan, implement, and facilitate the changes necessary to improve organization effectiveness/performance (managing change)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 28. able to develop theoretical and practical frameworks that describe complex ideas in simpler, usable ways (model building)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 29. able to behave in ways that are credible to the organization members. Serve as role model. (modeling credible behaviors)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 30. knowledgeable of the conditions responsible for variation in the intensity, quality, and direction of ongoing behavior (motivation theory)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 31. able to see organizations as dynamic, political, economic, and social systems that have multiple goals (organization behavior)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 32. able to develop and implement recruiting strategies to support organization's short/long term initiatives (organization design)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 33. able to measure the quantity, quality, productivity, effectiveness, and efficiency of work output (performance measurement)
(Not Important) 1 2 3 4 5 6 7 (Critical)

- _____ 34. able to influence and shape the behavior of others (persuasion)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 35. able to analyze policies and strategies to insure interventions
support the mission and culture of the organization (policy
analysis)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 36. able to present information orally so that an intended purpose
is achieved (presentation)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 37. knowledgeable of training methods or other resources to increase
a person's competence in order to improve their current
performance or prepare them for promotion (professional development)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 38. able to use a set of activities to help the client to perceive,
understand and act upon events that occur in client's
environment (process consultation)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 39. able to plan, organize, implement, and monitor projects
effectively (project management)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 40. able to clearly communicate your request, findings, updates, and
other information through writing (proposal and report writing)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 41. able to design and administer a data collection method
consisting of written questions and survey responses in order to
solicit subjective opinions (questionnaire design/use)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 42. able to establish relationships and networks across a broad
range of people and groups (relationship building)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 43. able to design organizational reward systems to improve employee
satisfaction and performance (reward systems)
(Not Important) 1 2 3 4 5 6 7 (Critical)

- _____ 44. able to define the sum total of expectations that an individual and others need to perform a specific job (role analysis)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 45. knowledgeable of the interface between the technical, linking, and social components of an organization (sociotechnical analysis)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 46. able to plan and apply evaluation procedures; collect and analyze data; and interpret results (statistics)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 47. knowledgeable of the concepts, methodologies, models, and tools needed to implement a new system or modify an existing system (systems engineering/analysis)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 48. able to help a work group become more effective in accomplishing its tasks and in satisfying the needs of group members (team development)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 49. able to develop theory from researched data (theory building)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 50. able to help employees gain the skills and knowledge for performance improvement, and for training and coaching others (training and development)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 51. able to guide organizations into partnerships with other organizations to perform tasks or solve problems that are too complex and multifaceted for a single organization to resolve (transorganizational development)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 52. able to establish a degree of trust among yourself and others (trust and rapport)
(Not Important) 1 2 3 4 5 6 7 (Critical)
- _____ 53. able to project trends and visualize possible and probable futures and their implications (visioning skill)
(Not Important) 1 2 3 4 5 6 7 (Critical)

- _____ 54. able to prepare written material that follows generally accepted rules of style and form, is appropriate for the audience, is creative, and accomplishes its intended purpose (writing skill)
(Not Important) 1 2 3 4 5 6 7 (Critical)

Background Information

Directions: Please check the appropriate response for each item.
Completion of this instrument acknowledges your understanding that this data will be used for research purposes only and will be kept completely confidential.

(1) Job Title:

(2) Category your HRD and OD profession best fits: (Choose one only)

Human Resource Development

_____ practitioner
_____ researcher

Organization Development

_____ practitioner
_____ researcher

(3) Continuing Professional Education:

_____ a. How many HRD and OD professional associations are you currently a member of?

_____ b. How many HRD and OD conferences, seminars, and workshops have you attended within the past twelve months?

(4) Highest level of education:

_____ 2 years of college
_____ Bachelor's degree
_____ Some graduate work
_____ Master's degree
_____ Doctoral degree

(5) Age:

_____ 19 or under
_____ 20 - 26
_____ 27 - 35
_____ 36 - 55
_____ over 55

(6) _____ Years of full-time experience in HRD and OD

(7) Gender
_____ female
_____ male

APPENDIX K
PANEL OF EXPERTS

Panel of Experts

The criteria set for the focus group membership was based upon: (a) availability; (b) several years of national experience in the HRD and OD profession; (c) their interest in the research project; and (d) their willingness to participate in the research project. All participants had at least 15 years of national experience. They ranged in age from 36 to 55, and their level of education ranged from some graduate work to the doctoral degree. Their names appear in alphabetical order.

Gregory C. Maciolek, Organization Development Consultant, President,
Integrated Management Resources.

Ms. Vivian Marshall, Training Supervisor, Olin Corporation, Olin Chemicals.

Dr. Debra Martin Petty, Organization Development Consultant and Director,
Administration-Human Ecology.

Dr. David E. Ripley, Human Resource Manager and Consultant. Consulting editor
for Performance Improvement Quarterly.

Ms. Judie Watson, Human Resource Development Consultant, President,
Personnel Directions.

Mr. Harold White, Organization Development Manager, Olin Corporation, Olin
Chemicals.

Ms. Robin J. Wienczkowski, Organization Development Specialist, Team Health.

VITA

Robert Thomas Nora was born in New Orleans, Louisiana and completed his high school education at George Washington Carver Senior High School. He received his Bachelor of General Studies in Business Management from the Whitmore School of Business from the University of New Hampshire. He received a Master of Business Administration in Planning and Administration from Golden Gate University.

Mr. Nora is a retired U.S. Air Force officer. During his military career he worked as an industrial engineer and served as Director of Manpower and Personnel Programs in the Human Resource Department, Ira C. Eaker College of Professional Development, Air University, Maxwell Air Force Base. He is currently serving as associate professor in the Industrial Technology Education Department in the School of Technology, Indiana State University where he teaches in the human resource development curriculum.

As a graduate teaching associate at The University of Tennessee-Knoxville, he taught both human resource development and microcomputer applications courses. He was honored for Outstanding Teaching as a Graduate Student by the Department of Human Resource Development in 1997 and for Outstanding Service as a Graduate Student in 1998.

Mr. Nora is an experienced organization development professional with over twenty years of extensive analytical and statistical management engineering skills, coupled with a comprehensive background in total quality management.