

International Society for Performance Improvement



TRANSFORMATION & CHANGE IN PERFORMANCE





Turning Over a New Leaf...



Sue Czeropski, PhD, CPT



Deborah Hood, PhD

all has arrived! For many, this time of the year is characterized by the changes of the season--cooler, crisper temperatures, the turning of color of the leaves, and of course, the anticipated arrival of all things pumpkin spice! Traditionally, Fall is filled with activities like football games, Trick-or-Treating, and raking leaves. With that said, it goes without saying that this Fall has been like no other. Those activities did not happen (well, you probably did rake leaves!) and as we head into the holiday season, we remain home-bound with no holiday travel plans or large gatherings in sight.

Speaking of change, who knew a year ago what this year would look like and the changes to our home and work lives that we've been challenged with? We decided to theme this issue "Change and Transformation in Performance" to reflect not only the changes of the season, but also the changes we are continuing to go through today as a result of the pandemic.

In this issue of Performance XPress, we are pleased to share what practitioners and organizations are doing as we continue to navigate through new and uncharted territory. You will hear about how learning design and delivery, leadership, and consulting, are transforming. You'll read about the necessity of credentials during this time. And you'll hear how a conference can go virtual.

We thank our contributors for their great submissions that make up this issue and invite you to consider submitting for the Winter issue in early 2021. Whether you are a seasoned practitioner, a leader in industry or a student learning about the field, your shared experiences and shared knowledge is what this publication is all about.

What can you submit? Talk about research you are doing, or best practices that are working for you. Share your ideas on how to make our work more effective. Help us grow our toolbox of knowledge by sharing your experiences with the ISPI community.

Thanks for reading and again, send us your feedback and submissions to px@ispi.org. From both of us here at PX, have a wonderful Fall and holiday season. We'll see you in the new year! Until then, stay safe!

FROM THE PRESIDENT

Welcome to the Fall issue of Performance Xpress! We thank all who have contributed to making our online publication a great success!

As the leaves transform into Fall colors, we consider ways that we must transform as an organization. We adapted to an online format for our 2020 annual conference. Thanks to the work of our Chapter Partnership and Web Management Committees, we have engaged several Chapters to share their programs and become an even more integral part of the ISPI website. (A special thanks to Sue Czeropski, Yvon Dalat and Jennifer Romer!) We encourage all Chapters to consider this option. It is a great way for us to all work together! As a result, ISPI and Chapters have made 24 diverse programs available to members even during this transition! (More than some other organizations!)

We remember to celebrate the wonderful life of Dr. Roger Kaufman. Roger was truly a blessing and inspiration to our ISPI family! Roger was been an esteemed thought-leader for our field of Performance Improvement. He was a founder, past president honorary life member and Thomas Gilbert Award winner with ISPI. He has been a regular contributor to our publications and most recently wrote "Making Evaluation Less Complex" which can be found in the August 2020 issue of Performance Improvement Journal. As Human Performance Technology practitioners, we honor his legacy and will continue to carry on his work. We all appreciate the path that he has prepared for the future. We will miss seeing him and hearing his wisdom during our conferences.

Have you noticed the Value banner on our website? Please take a few minutes to write a statement on the value you receive and can share and send to value@ispi.org.

Congratulations to ISPI-EMEA for a successful Fall conference, their 19th and first—ever virtual event!During October, participants enjoyed the theme: Achieving Measurable Performance Results in the Digital Era: Goals Aligned Outside-In and Relevant Across All Sectors" We congratulate Carol Panza, Maja Joakim, Juan Pablo Ortiz, Belia Nel, Margo Murray, Roger Addison, all Board members, presenters and participants. A multi-national group of Senior Executives presented their perspectives in a panel session, moderated by Juan Pablo Ortiz and four teams of participants developed and contributed ideas to the 2020 Open Assist Client, Communicare of South Africa.

And, announcing the 2021 ISPI Annual Conference-Save the Date...April 26-30, 2021! Let us continue to work together to build a new future and look forward to 2022, when we will celebrate 60 years of ISPI! This will be a great milestone for our field of performance improvement in work, worker, workplace and the world! During our 2020 Business meeting, we discussed our ISPI Strategic Goals:

- Express Our Value
- Offer Extraordinary Products and Services
- Be available/listen/serve our members
- Sustain the Society for Future Generations

We appreciate your continued support, encouraging you to volunteer and add value to others!

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PERFORMANCE INSIGHTS

DON'T EXPECT THE SAME EXPERIENCE, BECAUSE IT'S NOT. AND THAT'S OKAY!

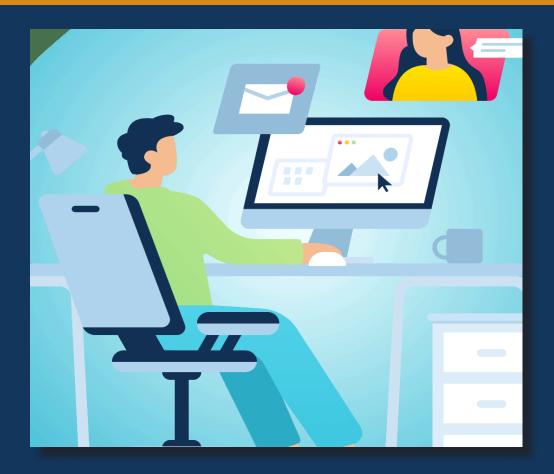
CREATE (INSTEAD OF CONVERT) VIRTUAL INSTRUCTOR-LED TRAINING

DENISE RENTON

n the past few months, we've all found ourselves connecting more in a virtual space than in person. Before this, I wouldn't have taken an online exercise class or used a telemedicine service. Why would I when I live in an urban area with so many amenities only a few blocks away?

But when in-person togetherness went away, it pushed me to try more virtual experiences. And you know what ... that's not such a bad thing at all! Via Zoom, I've taken dance classes and Pilates, gone on a guided Shamanic journey, and watched a performance of the Glass Menagerie with actors all in different locations. I've seen a modern dance premier streamed live from an empty theater and had my daughter visit the dermatologist over Facetime.

At first, I approached the virtual experiences with an attitude of "it won't be the same as the real thing, but it's better than nothing." I quickly realized though, that it's not about trying to recreate the same experience virtually; it's more about creating a truly virtual experience. And what you get out of that experience is not better or worse than the live experience ... it's simply different.



We need to think along the same lines when it comes to converting instructor-led training (ILT) to virtual instructor-led training (VILT). In fact, using the word "converting" may be what keeps us from developing truly engaging VILT. Don't try to make one be the same as the other. Don't approach VILT as if it will be lesser than an ILT and only as good as it can get under the circumstances. Give VILT a chance to be a great and impactful moment to learn by creating VILT, not converting.

When we use best practices for engaging virtually through presentation skills and the technology available to have the audience chat, annotate, share screens, and discuss in breakout rooms, we can build an experience that our learners will remember and that will meet the objectives we set for the training. And we give our learners the opportunity to practice additional skills such as being able to communicate successfully in a virtual setting, comfort with the technology that allows us to do that, and the ability to express themselves in different ways.

When I sat through the dance performance, I realized how focused I became without the audience and the applause. I got to see chats about what people thought about the performance in real time. Likewise, there were more people on the Shamanic journey who had never participated in one than those of us who had. Perhaps it felt easier and safer for the first-timer to patriciate virtually and that allowed more people to give it a try. When I watched the play with the actors in different screens, I was able to focus on each individually while being profoundly affected by the overall performance.

We can have this kind of impact in our VILT classes as well. Rather than approaching design and development as if we're trying to make the class live up to an ILT, we can start with fresh eyes to ensure we incorporate interactions and experiences that come alive in a virtual setting. We can provide learners with not only a class that meets the objectives for knowledge or skill transfer, but also a new perspective on what learning can be. They can walk away from the virtual experience as I did, pleasantly surprised by what's different. And that's okay!



Denise Renton (denise.renton@innovativeLG. com) is a performance consultant at Innovative Learning Group, a performance-first learning company located in Troy, Michigan. She has 30 years of experience designing and developing training and performance support solutions for Fortune 1000 companies. Denise finds that one of the most interesting aspects of the instructional design field is learning about what other people do in their jobs and how different companies pursue performance improvement for their employees.

Experiential Learning Is Making a Comeback!

How Does it Address Critical Business Needs As Organizations Shift to the "New Normal"?

Yvon Dalat



Accelerating the Need for Change

"What we are seeing is a great acceleration of trends that existed before the crisis. For instance, online delivery's volume increased by the same amount in eight weeks as it had over the entire previous decade"

This quote from Bryan Hancock and Bill Schaninger of McKinsey in their July 2020 article, also applies to newer approaches to learning such as Experiential Learning or Learning in the Flow of Work.

hese approaches once coined Structured-On-The-Job (SOTJ) training or 70-20-10 are being resuscitated, as the global pandemic intensifies the need to get rid of the "muda" and focus on the most critical business needs:

- a. **Reskill or Upskill Our Workforce**: According to McKinsey, 87%² of interviewed organization report that they experience skill gaps in their workforce or expect to within a few years. A May 2020 Brandon-Hall report found that 43% of the surveyed organizations³ are still determining whether employees will come back to the same jobs/roles or whether their job will change due to current business conditions.
- b. Efficient, Engaging Learning Solutions with the Least Possible Impact on Employees' Productivity: This has always been true, hasn't it? But being thrown into a crisis, or near-crisis, situation has really changed the imperative from a noble goal to top priority. In fact, for 54% of organizations³, increasing employee productivity is a priority during the transition to the "New Normal".
- Collect and Analyze New Data Points from Our Learners: Back in 2016, our survey showed that 85% of L&D leaders wanted to improve business performance, but only 19% of them used learning analytics⁴ to improve the learning services they offered. Not much has changed since then, but now is the time when talent and performance data are desperately needed to personalize learner experiences, optimize learning transfer and deliver measurable results.

L&D Shifting Gears in 2021: Join The Conversation!

From Effective Virtual Training to New Workforce Learning Strategies, there is no doubt that Learning is shifting to the "New Normal". In this new context, what do you see as the Top 3 Trends in Learning in 2021? Make your voice count and respond to this <u>one-question survey</u>.

Four "Must Ask" Questions for Designing Effective, Experiential Learning Programs



In order to address these critical business needs and move the needle of performance with measurable results, we need to design Experiential Learning programs that maximize learning transfer. Below are four "must-ask" questions that can make or break the effectiveness of our Experiential Learning solutions:

#1. Do our learners understand the importance of the program on the organization's bottom-line? What are their rewards or incentives for applying what they've learned?

It's about "Understanding First" the business challenges we're addressing, then conveying its importance to our learners and their supervisors:

- How does their individual performance affect the business bottom line?
- What are the consequences of poor performance?
- How will the Experiential Learning program help them develop their skill sets?
- Are incentives in place to reward outstanding performance?

Armed with this understanding of the business context, learners will be more likely to retain and recall when confronted with difficulties.

#2. What are the new types of practice opportunities that will maximize learning transfer?

In the post-COVID world, a successful program is not about delivering a training session with participants enjoying donuts while the instructor gets them to digest content-rich slides. Rather, it's about stepping away from the formal training structure and facilitating opportunities to learn and practice. As these practice opportunities engage learners by applying new concepts, they also enable the Learning & Development team to verify employees have the right tools and supervisors to perform their job.

A well-designed Experiential Learning program delivered to remote employees include practice activities such as:

- Simulations and case studies as safe-practice opportunities
- Guided practice and rehearsals with a coach or peers providing feedback
- A gradual path from easy to more difficult exercises
- Actual work projects conducted as the capstone of the Experiential Learning program

In addition to engaging learners and maximizing retention, these type of activities make Experiential Learning a cost-efficient way to learn as it blurs the boundaries between hands-on learning, practical application, and actual work.

#3. How do you prioritize which work tasks to practice?

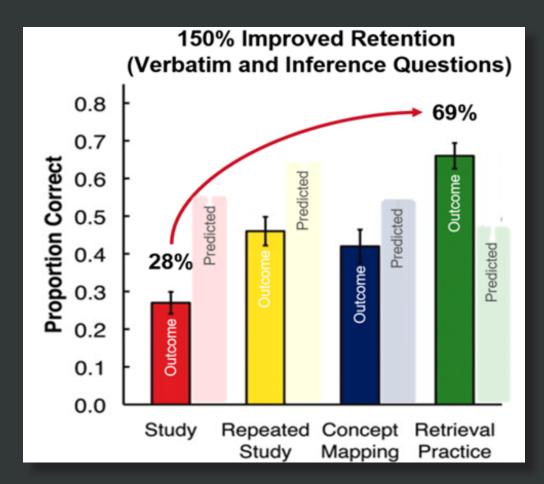
Should all work tasks be covered during training with an opportunity to practice? Not necessarily. Experiential Learning programs designed for efficiency and effectiveness focus their practice opportunities on the most Difficult, the most Important, and most the Frequent work tasks (the so-called DIF criteria – Please contact us for examples and case studies). Over the years, RPS team has developed an efficient "Architect" methodology to deconstruct work tasks, analyze their components with the DIF-criteria, and reconstruct them into a new Experiential Learning journey. And part of this journey includes supervisors' or structured feedback as the most potent learning factors to correct misconceptions and mistakes.⁵

#4. How well is the Experiential Learning program distributed over time?

Learning is a gradual process, not a one-off event. Unlike formal training, Experiential Learning programs start with easy practice and gradually increase to more difficult practice opportunities. Ultimately, they engage learners, asking them to apply new concepts on actual work projects.

Why can't we concentrate all experiences over a few days? Remember when you learned to ride a bike, how to ski, or how to drive. Spacing activities out improves future memory retrieval. This is accomplished with the repetitions of content and practice opportunities. A study published by Jeffrey Karpicke and Janell Blunt from the Purdue University6 found that Retrieval Practice improved retention by 150% when compared to Elaborative Studying.

What's even more interesting is this same study found that students were largely unable to predict this benefit. Again, this stresses how crucial it is to explain the importance of the program to our learners and engaging them throughout the learning journey.



Retrieval Practice improved retention by 150% when compared to Elaborative Studying

Experiential Learning "COVID-Edition"

Experiential Learning programs actively engage employees in a structured blend of micro-learning, assessments, polls, and practice. They lead learners through a series of remote, but hands-on activities to learn new concepts, apply them in their workplace (in the office or at home), share what they learned, and earn rewards with each new learning experience.

But Experiential Learning is not the answer to all training challenges. In the Bloom's taxonomy of learning objectives, Remembering and Understanding are concepts that can be covered with a well-designed Interactive Design Document, short micro-learning, or an Interactive Video. Experiential Learning programs are most applicable to address critical skill gaps, reskill, or upskill employees whenever the work tasks to be trained are Difficult, Important, and Frequent (DIF Criteria).

Measurable Results

"I really think this training achieved a new level of Excellence After 23 years, I have never had a training that prepared me so well to face a customer. The three month journey provided me with on-going feedback, the ability to retain knowledge and to practice."

This quote is from a learner going through an Experiential Learning program designed and deployed by RPS team in Mexico. Overall, feedback from more than 1,000 learners going through that EL journey were outstanding:

- 95% rated the content as relevant;
- 96% found Experiential Learning as high impact;
- 99% would like to use it again.

For our customer, this learning journey also resulted in 25% more learners engaged and four times more learning experiences, when compared to traditional formal training. The Experiential Learning program just earned three 2020 Brandon-Hall Awards for Best Unique/Innovative Learning and Development Program, and is listed as a finalist for the upcoming 2020 Chief Learning Officers Excellence Awards.

As we all start drafting our learning strategies for 2021, we'll need to adjust to the "new normal" and listen to the needs of our remote workforce. If you're looking for innovation and best results in learning, make sure you select the right partner who can share their experiences in designing and deploying effective Experiential Learning solutions. Contact RPS today and we can help you plan and execute new, innovative learning approaches that achieve measurable results.

Reach Out to Experienced Learning Providers

Experiential Learning strategies, assessments and performance benchmarks of your learning strategies: how do you use these approaches to shift learning to the "New" Normal?

Contact RPS' learning and performance experts today and ask for our Experiential Learning case studies. You can also visit us at RPS.com to learn more.

Have you tried Experiential Learning solutions? What was your experience? Start a conversation in the comments below or connect with us on LinkedIn, or at @RaytheonRPS using hashtags, #Learning, #Training, #ExperientialLearning, and #DigitalLearning.

Sources and References

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Yvon is a Raytheon Technologies' Global Program Executive and ISPI's Certified Performance Technologist. His Learning and Performance Improvement programs have earned 3 Raytheon CEO/President awards and more than 10 industry awards from CLO Magazine, Learning Elite, HRO Today and Brandon-Hall.

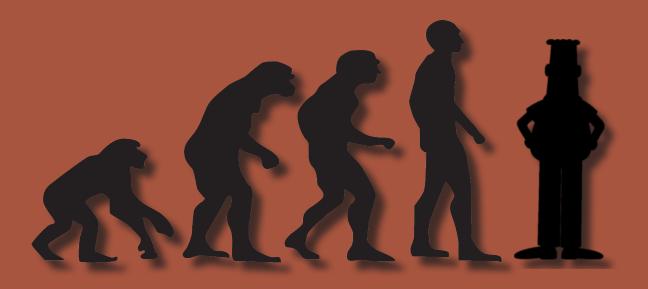
His areas of expertise include: L&D strategy design and implementation, learning measurement, performance analytics, journey to performance, Raytheon 6 Sigma, business diagnostics, performance consulting, global learning solution, learning technology and innovation.

Yvon holds certifications as Raytheon's Certified Program Leader and ISPI's Certified Performance Technologist (CPT). Over the course of his career, Yvon's key accomplishments have included managing and expanding RPS business in Eastern Europe in the late nineties, China in the early 2000, Russia in 2006 and Korea in 2011. He led the transformation with measurable results of large-scale learning programs in Europe, Mexico and the US.

He has also served as President of the International Society for Performance Improvement (ISPI) in Michigan, Chair of ISPI's Chapter Partnership Committee and Chief Learning Officer's Judge. In 2019, he received the White House's President Volunteer Service Award for his "unparalleled commitment to improving the life of others".



Yvon authored three books on the subjects of Self-Management and Practical Guidance for a Balanced Life, which were published by leading editors and translated in multiple languages. He speaks four languages, has resided in the U.K., Switzerland, France and Germany, and lives with his family in the U.S. since 2007. Yvon completed his Aerospace Engineering Bachelor Degree at the Technical University of Darmstadt in Germany, and received a MBA degree from Leicester University in the UK.



FROM THE CURMUDGEON Leadership from Neanderthal to Dilbert

Gary W. Craig

bout four years ago I published a blog on *TheVectorView* titled *Is This the Year of Management and Leadership Development?* In it I described some trends we saw in 2016 indicating a focus on management and leadership development. I also committed to revising and posting a presentation I did on leadership. More on that later.

When I first associated with Vanguard Consulting/Vector Group in 1989, I came with about nine years of experience working in community mental health as a counselor/psychotherapist and another four years working in a probation department evaluating people convicted of drunk driving to determine their needs for education and/or therapy. Before all that, I'd had three years' experience in the Army (served in the same outfit that Butch did in Vietnam). I'd just finished a master's degree in management with an emphasis in human relations and organizational behavior. I had SOME idea about management and leadership, but I still had a lot to learn.

n the Army it was simple. It was command and control and you followed orders. I did my best to circumvent those from time to time but that would be another story. At the community mental health center, social workers and psychologists, who were appointed to those positions, managed and supervised me. They did not have a realistic clue what supervising, managing or leading others meant. In the probation department I found out what nepotism, cronvism and sexism were all about. I discovered my boss was what I referred to as a "benevolent autocrat." He gave the appearance of care and concern for his staff but at his core, it was his way or the highway.

I do owe my years of successful work with Vanguard/Vector Group to him; I dared to question one of his decisions in front of others and I went from four years as an "exemplary employee" to a "marginal" one in a matter of days and was fired shortly after that. I did a presentation in one of my graduate classes on "Never Work for a Jerk." It was a hit among my fellow grad students.

From our observations (Bob Carleton's and mine), leadership and management development seemed to be trending back in 2016. We heard of several inquiries regarding the topic and we made our best guesses as far as what might be driving this need. We can look at the economy, the price of oil,

geopolitical conflicts, tightening budgets, lack of skills on the part of new entrants into the business world and the list goes on. It probably boils down to making the most out of our human resources and further developing individual capabilities in harnessing the collective engagement of a workforce in producing needed results.

Over the last 150 years or longer academics and business people examined, analyzed, discussed and described leadership in many ways in terms of personality traits, skills, effects on others, or some combination of these. This reminded me of a presentation I did for an American Society for Training and Development (ASTD now ATD) chapter on leadership development a few years ago. The topic was Leadership: From Neanderthal to Dilbert: Not Much Change in 50,000 Years. I reprised and updated that presentation on LinkedIn as it had many good learning points. You can look, if you like. I hope you find the presentation helpful.

https://thevectorview.files.wordpress.com/2016/02/vector-group_leadership-from-neanderthal-to-dilbert_gcraig_linkedin.pptx

As an aside, let us take a fun revisit to the "Great Man Theory" of leadership. As we assess personality traits and attributes, we always arrive at the question of, "Are great leaders born or made?" Let us take a close look at similarities between great leaders by looking at three of them.

Q: What do Genghis Khan, Alexander the Great and Attila the Hun all have in common?

A: The only three common leadership traits or attributes these three "great leaders" have in common are:

- All male
- All short (Genghis Khan was 5'8", Alexander the Great was 5'7" (best guess) and Attila the Hun (Priscus, who visited Attila's camp in 448 AD, described him as being "short and squat with a large head")
- All left-handed
- (Additionally, the one other thing they had in common was that that all died of mysterious causes (could have been sexually transmitted diseases)

My first experience with management and leadership development was our 1992-93 work with one of the nation's largest health insurance companies in the US with 3,300 employees and 350 managers experiencing dramatic competition and loss of business. We worked with their senior executives to create the message of:

Despite the changes in our environment, many of us continue to manage in much the same way as we always have. It's almost as if we're simply managing harder—not differently—in the expectation that what we need to do is just hang on until the change settles down.

There is no indication that our environment WILL "settle down." All evidence indicates that that change is now a permanent part of our lives.

The key to managing in a changing environment is to move the organization and its people from stability to flexibility—a major change to the leadership skills of today's management.

This doesn't mean that many "traditional" management practices and values are in any sense wrong, or even outdated. Rather, they are only one set of the tools a manager needs to operate effectively in a changing and unstable environment. In fact, basic management skills provide a stable base so that we can afford to exercise the flexibility required for managing in a changing environment and leading the organization into the future. (©Conifer Consulting Group, Vector Group, Inc., 1992)

Bob Carleton led this project and the work came to us from one of his trusted colleagues who worked in HR there. After initial discussion we realized that their management group needed "a slap upside the head" to create a sense of urgency to move forward in this leadership development workshop. Bob had a fun time coming up with the name of the 5 ½ day program as the "Strategic Leadership Action Project" or "S.L.A.P." Needless to say, the client was not keen on the name but we all kept it as an inside joke for years.

We ended up transforming the organization, improving operations, developing management capabilities while reducing complacency and creating a sense of urgency. Vector Group, working in partnership with our client, achieved improvement in 32 management practices for 350 managers. An independent internal audit showed 600+% return on investment with additional \$8M benefit related to behavior change. The client achieved a \$13M increase in profitability through improved operations.

This leadership develop program also exposed me for the first time to 360° feedback using an ipsative array. Maybe the Curmudgeon will write about that sometime in the future.

What IS Leadership?

We usually look at mainstream business literature to find answers. For example, a more scholarly view might be "Decades of academic analysis have given us more than 850 definitions of leadership. Literally thousands of empirical investigations of leaders have been conducted in the last seventy-five years alone, but no clear and unequivocal understanding exists as to what distinguishes leaders from non-leaders, and perhaps more important, what distinguishes effective leaders from ineffective leaders." (Bennis and Nanus, Leaders: The Strategies for Taking Charge, 1985)

I prefer going to more non-conventional sources for gaining my insights into leadership like:

"Leadership is an intangible quality with no clear definition. That's probably a good thing, because if the people being led knew the definition, they would hunt down their leaders and kill them." The Dilbert Principle, 1996

-OR-

The whole concept of leadership involves getting people to do things they don't want to do. The trick is to convince employees that they will feel good if they do these things—not in the sense of having adequate food and shelter, but in the sense that their hearts and souls will be nourished. Fortunately, their egos are so beaten down that they're like goats trying to munch tin cans—willing to digest any ridiculous thing you feed them. Dogbert's Top-Secret Management Handbook, 1996.

In looking in my library I have volumes of books from the usual suspects of Bennis, Blanchard, Schein, Covey, Burke, Block and an abundance of Kotter books encompassing leadership and change totaling some 30 – 40 books on leadership and management from this variety of authors. Digging more deeply I find other book titles describing leadership as enlightened, empowered, principle-centered even "white water" leadership.

Vector Group's Functional Leadership Model

FUNCTIONAL LEADERSHIP

Leadership has been analyzed, discussed and described in many ways: in terms of personality traits, skills, effects on others, or some combination of these. At Vector Group, we always took a functional approach to this analysis and description. Instead of asking what good leaders are like, a functional approach asks what they accomplish and how. This has two significant benefits:

- Functional leadership is results-oriented. It begins by looking at the results expected or desired of good leaders, rather than by looking at the people themselves, or the subject matter. It is not much use getting high marks for having leadership characteristics if no one follows.
- Functional leadership provides a useful framework for understanding disparate, or apparently contradictory, phenomena. For example, we accept Winston Churchill and Mohandas Gandhi as acknowledged leaders with very different traits and behaviors. We facilitate making sense of the wide differences among leaders if we examine actions in light of the purposes or functions they serve. Examining complex performances this way makes it clear that, with differing populations, environments, and conditions, very different behaviors may accomplish the same purpose.

FUNCTIONS OF LEADERSHIP

There are three basic needs common to such diverse groups as a mob storming the Bastille, a primitive tribe of hunter-gatherers, a basketball team, or the executive committee of a corporation. The first need is for a common direction: for example, "free the prisoners," "bring in the harvest," "make the goal."

The second need is for motivation — for a reason to work together toward that direction. Without that motivation, individuals may fall away from the group, or spend much of their time meeting their own needs, at the expense of the group's needs. The executive committee will be ineffective if its members are concerned solely with their own personal advancement; the tribe of hunter-gatherers may starve if individuals eat all the berries, they find without saving or sharing. The third need is for guidance; both the team and individuals within it need to know whether they are on track, and what they can do about it. The mob storming the Bastille will be helped by knowing where the gates are unguarded; the basketball player will be helped by advice on how to get open.

When one person provides for most of these needs, that person is usually called the leader. Thus, the fundamental functions of leadership, and the associated results are:

Direction: People know where they're going: they can describe their mission and goals; they spend most of their time on tasks and behavior directly related to achieving those goals.

Motivation: People see reasons for going there: they find the work and its goals rewarding; they generally prefer team- and goal- oriented behavior (at least in the work setting) preferable to non-goal-oriented behavior.

Guidance: People know how they're doing and what to change: they get information about progress and how to improve; they can act on that information.

Though this description of leadership differs from that found in much literature on the subject, it is not incompatible with it. The primary difference lies in the use of functions or purposes to drive the description. Bennis and Nanus (1985) describe leadership in terms of four "strategies," five key leadership skills, and their effect on followers (empowerment) but most, if not all, of the content of that description can be encompassed within the functions above.

The functional view assumes that we define leadership by the relationship between the leader and a group including both the leader's behavior and its effect on the group. Leadership is not inherent in the individual; it is neither a set of traits, nor something people are born with. Rather, it is something one provides to a group to meet certain needs. One cannot be a leader without a group that wants and will use what a leader can provide.

LEADERSHIP vs MANAGEMENT: IS THERE A DIFFERENCE?

There are two generic strategies the leader can take to improve the performance of individuals or a group:

- 1. Take what exists and make it work to its fullest capacity
- 2. Change what exists to make it work better

Guidance

The first is the "master mechanic" approach. Mechanics do not redesign a car; they tune it, clean it, and supply it with the best parts and fuel to make it work to its fullest potential. The second is the "master inventor's approach. Inventors are more likely to dispense with the existing order and design something new. The second approach is clearly the riskier but is sometimes well worth the risk.

Both strategies are legitimate, depending on circumstances; and they are not incompatible. For example, in the process of making something work better, people often find ways to change it; and in the process of trying to redesign something, people may find a way to make the original item work better. A leader may operate in either or both modes.

We prefer to avoid a leader-manager distinction for two reasons. First, it suggests that leadership consists primarily in changing what exists, which limits the applicability of the concept. Second, the sharp contrast between "leaders" and "managers" may suggest that one cannot be both, and often leads people to consider one better than the other. Some authors take the leader-manager separation to an extreme that extols the virtues of leaders and leadership behavior in part by denigrating managers and management behavior.

A functional approach to leadership begins with the assumption that, given the right circumstances and support, people can often learn the behavior of either leadership, or management, or both. To do otherwise is to place unnecessary, and usually inappropriate, limits on people and their capacity to perform. Kotter (1990) takes a similar approach to the leader-manager distinction.

When we look at the implications of the transformational and transactional approaches for the functions and behavior of leadership, we see that they do not affect the need to perform the functions of direction, motivation, and guidance. The difference lies primarily in the form of behavior used to accomplish each function.

The following table provides examples of how the behavior of a leader would be different when operating in the transformational or transactional mode.

Figure 1. LEADERSHIP FUNCTIONS

Figure 2. Sample Transactional and Transformational Leadership Strategies

TRANSACTIONAL leadership emphasizes these kinds of behaviors:	TRANSFORMATIONAL leadership emphasizes these kinds of behaviors:
Setting clear, measurable objectives Meeting performance standards Establishing procedures and systems to guide and support doing the work Dealing with existing systems in a practical, realistic way Getting the work done Making use of knowledge based on experience Taking action	 Communicating high expectations Living up to potential Establishing principles to guide priorities and decision-making Looking for opportunities to do things better Getting ready for the future Taking new and different perspectives Communicating a picture of the future

Figure 3. Sample Leadership Behaviors

	Direction	Motivation	Guidance
Transactional	Effectively translates company strategy into projects and/or job assignments	<u>Lets</u> people know that their efforts are important.	Is readily accessible to people seeking guidance.
		Makes a point of telling	Gives feedback for
	Makes sure people are clear about what is expected of them.	others about the good work done by the team.	improvement by focusing more on how to avoid problems that on assigning blame.
Transformational	Keeps people informed as to the "big picture."	Behaves as though expecting others to do things well.	Acts in a way that is consistent with the stated values and principles of the
	Anticipates what the future	900 PM - 100	group.
	could hold and how the team	Links individual and team	N N N N
	could take advantage of it.	efforts to the overall success of the organization.	Consistently asks "what can we learn?"; when things do not go as expected.

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CONCLUSION

I've taught hundreds of undergraduate and graduate students in dozens of classes over the last several years and it always amazed me at their general lack of understanding of what leadership and management are. Then again, I ran into the same thing within the business organizations where we consulted; even those in management and leadership positions did not have a full understanding of their management and leadership roles, requisites and responsibilities.

People seem to continue believing that "leaders are born and not made" or that behavior by those in management and leadership positions is not noticed. When we facilitated the Management Mirror process with executive teams that included both individual and collective feedback, the message we provided was "Here is what you are doing and how you and your actions are perceived. Here is what your people and others in the organization are doing as a result of your actions. Here is how your individual and collective behavior as the top management team impacts on day-to-day organizational performance, and achievement of results." (Craig & Lineberry, p. 248)

Ralph Waldo Emerson said it best. "Your actions speak so loudly; I cannot hear what you are saying." We always tell our clients regarding management behavior the following truths about how people lower in the organization interpret things:

- It is what you say and what you do not say.
- It is what you do and what you do not do.
- It is what you prioritize or do not prioritize.
- It is in what activities you engage in or not engage in.
- It is the time you spend at work or the time you do not spend at work.
- It is with whom you spend time and with whom you do not.
- . 77

(Craig, Gary W., From the Curmudgeon: The Management Mirror: Are the Emperors Naked? PerformanceXpress, April 2019.

Over the years both Bob and Butch, but particularly Bob, drilled the concept into me that "leadership is a conscious act" and I, in turn, passed that along to all the supervisors, managers and senior executives I worked with in so many different organizations. I now pass that along to you.

With the challenges we face on a global basis including the COVID-19 pandemic, the political situation everywhere, race relations, gender equality, the environment and climate change, and international relations, maybe now YOU can ascertain the effectiveness of leadership in our society, in our various levels of government, our businesses and our communities. Please let me know your conclusions.

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Mr. Gary Craig's career represents almost 30 years of experience in organizational change management, human resources development and organizational development and effectiveness. Recognized for his ability in efficiently and accurately assessing organizations and recommending and implementing changes aligning organizational culture (human behavior) with infrastructure and strategic business objectives, he is highly skilled in driving for optimal performance within organizations. He contributed significantly to several large-scale strategic initiatives in the US, Canada, UK, Europe, Mexico, South America and the Middle East (Yemen). He has worked in 16 countries on four continents. He holds a Master of Arts degree in Management/Human Relations and Organizational Behavior.





ISPI EMEA – The Performance Systems Network Inc.

Going Virtual . . . 2020 Conference Feedback

Carol M. Panza



ISPI EMEA's 19th conference, originally scheduled for Tbilisi, Georgia, became our first ever virtual event! Read on to see what happened and what the participants had to say.

hose familiar with ISPI EMEA in-person conferences, know that they are organized with a unique, highly interactive format and are maintained small in size to ensure maximum value to participants. In 2020, we faced a powerful obstacle to even organizing a conference, . . . a global pandemic. It became clear that an in-person event would be impossible. So, instead of simply canceling our 19th conference, we decided to face the challenge head-on and take our unique conference format online. But, could we make it as valuable and highly engaging as our in-person events? We could certainly try.

It was no easy task to support our format and also manage a new technology-based delivery approach. I, for one, had moments when I wondered what in the world we were thinking when we made the decision to go with a virtual conference!!! However, our 2020 event turned out to be a good example of our unique format and a truly valuable learning/sharing event, as measured by our participants. You see, we believe very strongly in feedback from our participants to keep us moving forward on our continuous improvement journey. We gathered feedback in several ways.

In addition to our traditional focus-group style feedback session, at the end of our events, for the 1st ever ISPI-EMEA virtual conference, we also encouraged and provided some simple tools for participants to share their comments, throughout the conference, in the following broad categories.

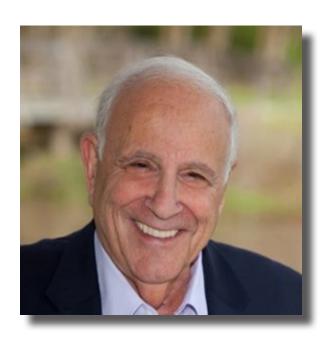
- o What was good (Good/Continue)
- o How we could get better (Improvement Opportunities)
- o Other comments or suggestions for the future (New Ideas)

Ongoing feedback was facilitated with the aid of tools, available throughout the event, including a straightforward Google Docs file and also a section of a Mural (visual collaboration tool). We, of course, also received comments 1) verbally, 2) through the Zoom (our meeting platform) chat-function, and 3) via email messages. Actually, if you would like to get a real feel for what ISPI EMEA 2020 was like, just ask anyone who participated, for their thoughts on the value of the 19th ISPI EMEA conference and first virtual event!!! In any case, the following report attempts to provide an overview of the conference, and to summarize the feedback we received

from participants at our October 1-3 and 5-6, event.

This year's conference was organized by the ISPI EMEA Board and Conference Committee, and supported by Patron Sponsor MMHA, the Managers' Mentors, Inc., with valuable technical support from Flying Manta. The conference brought together participants from 15 countries. This diverse group of international professionals and executives, formed a truly engaged forum for active learning and sharing, all concerned with this year's forward-looking theme, Achieving Measurable Performance Results in the Digital Era – Goals Aligned Outside-in and Relevant Across All Sectors.

Before sharing an overview of our ISPI EMEA 2020 virtual conference format and program elements, there is a special tribute that we would like to share, as we did during the conference Opening Session. We were all deeply saddened when, shortly before the October 1 start of ISPI EMEA 2020, a long-term ISPI EMEA thought-leader, mentor, supporter, colleague and friend, Dr. Roger Kaufman, passed away. Upon receiving the news, the organizing committee unanimously agreed to dedicate our 2020 conference to the memory of our dear friend and a truly valued member of the ISPI EMEA family. In fact, always happy to share at our conferences, Roger was scheduled to present within a special highlighted panel session, Performance Improvement - Past, Present and Future (October 5, 2020).



Conference Program Overview

Below (Figure 1), please find a Program Overview graphic for the five days, October 1-3 and 5-6, covered by the conference. The schedule was designed with only four (4) hours committed to sessions each day, with sessions laid out over October 1 – 6, including a weekend, i.e., Thursday through Tuesday (except Sunday). This scheduling choice allowed us to accommodate the short 4-hour days, while keeping the overall conference time-commitment as compact as possible. Note that we also included optional "Discussion Spaces" available every day, throughout the day, beginning one (1) hour before (except for October 1) the start of sessions and remaining for one (1) hour after the end of the last session. He availability, design and management of Discussion Spaces were important to our participant engagement goals. Program highlights included - the Open Assist Experience, 10 Briefing Sessions, a Senior Executive Panel, and a panel focused on Performance Improvement, Past, Present and Future.

	October 1	October 2	October 3	October 5	October 6	
15:00 CET 09:00 EDT 06:00 PT		Discussion space of your choice	Discussion space of your choice	Discussion space of your choice	Discussion space of your choice	
16:00 CET 10:00 EDT 07:00 PT	ISPI EMEA 2020 Conference Onboarding Session	Daniela Robu & John Lazar 13 Steps: Innovation to Implementation	Senior Executive Exchange	Elusha Jansen Thrive in exponential times! Senior Executive	Thrive in exponential	Louis Thomas Herman What happens after the auditors leave?
17:00 CET 11:00 EDT 08:00 PT	Open Assist:	Juan Pablo Ortiz & Cecilia Alwin How to effectively fulfill fundamental		Lisa Giacumo & Tutaleni Asino A system mapping process in Namibia	Open Assist:	
18:00 CET 12:00 EDT 09:00 PT	Bidders Conference	Sylvia Lee Why and How to Build a Strengths-Based Organization	Nancy Burns & Judith Hale Roadmap to Building a Consulting Firm	Addison, Joakim, Wittkuhn Performance	Team Proposal Presentations	
19:00 CET 01:00 EDT 10:00 PT	Fritz Lebowsky et al. Leading in, leading out, leading together	Margo Murray Mentoring - Strategy for Leverage and Measurable	Jim Morrison Organizational Leaning from Adverse Events	Improvement: Past, Present, Future Dedicated to Dr. Roger Kaufman	ISPI EMEA 2020 Closing Session	
20:00 CET 02:00 EDT 11:00 PT	Discussion space of your choice	Discussion space of your choice	Discussion space of your choice	Discussion space of your choice	Discussion space of your choice	

Conference Format Highlights

As with all of our conferences since 2007, the 2020 agenda featured an Open Assist Experience, beginning during the first session on Day One (October 1), and running throughout the conference to Day Five (October 6), when participant teams were scheduled to present their proposals. In addition, two (2) compelling panel sessions were conducted, in extended (90 to 105-minute) time slots, as well as, ten (10) shorter Briefing sessions, on a range of topics related to our conference theme and selected via a Call-For-Proposals process.

2020 Open Assist

As mentioned above, the Open Assist Experience, which runs throughout every conference, is the centerpiece for our annual events, with the important objective to provide value to both conference participants and, of course, to our Open Assist Client. We were fortunate this year to have a wonderful and very fitting client, **Communicare**, which has been contributing successfully and sustainably to society (which Roger Kaufman called, the Mega level), in the area of Cape Town, South Africa, for more than 90 years. If you would like to learn a bit about this very special organization, including what and how it contributes to society, visit the organization's website by clicking on the Communicare logo or name (link) above, and/or via the ISPI EMEA website, Open Assist section, where you may scroll down to "2020 Open Assist Client," or simply click here.

Briefing Sessions

The virtual delivery medium for ISPI EMEA 2020, prompted us to schedule and offer ten (10) high value Briefing Sessions in a 30 to 45 - minute format, with only one (session) per time slot, rather than the 45 to 60 - minute format, with concurrent scheduling, three per time slot, for Briefing Sessions, that we have been using for in-person conferences. In that way, all participants had the opportunity to participate in all Briefing Sessions, instead of only a third of those presented, as with concurrent scheduling. Furthermore, all conference sessions were recorded and made available to all participants. In that way, access to conference content accommodated participants spread over a wide range of time zones, as well as those whose schedules didn't permit the dedication of at least 4 hours per day, on five (5) conference days.

Senior Executive Panel

A perennial favorite and an ISPI EMEA tradition, the Senior Executive Panel was expertly facilitated by Juan Pablo Ortiz, who has facilitated all but two of our Senior Executive Panel sessions, since the first one in 2010. Thanks to our virtual format, which required no travel this year, for the first time, we were able to invite and welcome panelists from across the entire Europe, Middle East, Africa (EMEA) region. As always, panelists were senior executives from diverse backgrounds, Jason Kap Kirwok (Kap) – Chief of Party, USAID/RIGO-SSA, representing The Kaizen Company, Andre Venter – Founder and Pack Leader (CEO), NVNT, Matts Agelii – CEO, Inserve Technology AB, and Ruud Janssen – EMBA, CFO, Sysmex Middle East FZ LLC. The Senior Executive Panel made a great contribution, as always, to our conference, adding very interesting and candid insights and opinions from a diverse cross section of senior executives.

Performance Improvement – Past, Present, and Future (Panel)

A new panel session was organized and delivered in 2020 by Maja Joakim, Roger Addison, and Klaus Wittkuhn, together with invited panelists, originally to include Roger Kaufman. With Roger's passing, this thought-provoking special panel session was dedicated to his memory as a valued mentor, thought-leader, colleague and friend. The panel session triggered extended conversations that were carried into the Discussion Space set up for that session. There was also great interest in further conversations, after the conference, particularly focused on the future.

Conference Highlights Summary

Our ISPI EMEA conference format is one designed to encourage and support engagement. However, as the organizers, we did have concerns about an ability to foster the kind pf engagement and active involvement with a virtual event, that we consistently generate at our ISPI EMEA in-person events. That concern led us to create and enable easy access to what we called Discussion Spaces.

As usual, conference participants represented a unique mix of countries, cultures and backgrounds as well as professionals new to ISPI EMEA and longtime supporters. We are delighted to report that ISPI EMEA 2020 conference participants and presenters seemed enthusiastic, engaged and involved throughout the event. But, what's more important than our observations, is the direct feedback we collected and have summarized below.

Participant Feedback/Continuous Improvement Opportunity

An important part of all ISPI EMEA conferences and a natural extension of our learning, sharing and high-interaction orientation, is our focus on feedback, which we collected throughout the conference, during the closing session and after the conference via unsolicited, but much appreciated email messages. Feedback, from all sources, was, as always, gathered around three simple and fundamental categories.

- o What was good (Good/Continue)
- o How we could get better (Improvement Opportunities)
- o Other comments or suggestions for the future (New Ideas)



Focused Feedback – Good/Continue, Improvement Opportunities, and Other Suggestions

Overall conference feedback was very positive and constructive. We were grateful, as always, to receive comments and suggestions clearly offered to support our ongoing continuous improvement objectives. We hope to remain on this path, building on past successes and incorporating and adapting innovative new ideas from each successive conference.

Good/Continue

Time and Timing

- o Longer more time/opportunities, for Open Assist Teams to meet. [Virtual event 5 half-days over a 6 day period, In-person event 2 ½ days]
- o I liked that the Open Assist Teams could attend [actively participate in] more of the presentations and had access to them all [via recordings].
- o It was nice to have half-days in the virtual format.
- o Great organization of the conference! It was ideal that we could follow all the sessions.

Overall Value

- o All presentations were wonderful! The coordination was great! Thank you for a wonderful conference experience.
- o Very meaningful dialog regarding the great future-oriented presentations.
- o Virtual is different, but works great!
- o Very smooth organization. Great presentations by the teams. Thanks for all inputs and great work.
- o Great opportunity to make contacts and collaborate with friends
- o Virtual expanded our reach, both participants and Senior Executive Panelists, yet interaction was still high, like we were all toge ther.

Discussion Spaces

- o I loved the interaction that we were able to achieve. The breakout rooms (Discussion Spaces) were great.
- o Great quality presentations and I valued the chats (Discussions Spaces) after presentations
- o The discussion sessions (Discussion Spaces) with simple access through break-out rooms made it easy to interact with other participants like being there [in person].
- o Really enjoyed the opportunity to discuss after the sessions (Discussion Spaces). Lots of stimulating conversation and exchange of ideas.

Open Assist

- o Working in teams was energizing and I learned about myself as well as improved my knowledge and skills.
- o Thank you so much and your teams, who provided truly stimulating idea. We really were not expecting to receive so much value! OA Client

Technology

- O Great technical support from Brenton and Stan [Flying Manta]. I suggest we run both virtual and in-person conferences [in the future].
- o Overall going incredibly smoothly. Kudos to the conference and techie teams.

Improvement Opportunities

o I personally found one technical issue. The Briefing session presented via sharing a MURAL [visual collaboration tool], was hard to hear.

New Ideas

- o A thought after the conference is over, could the four Open Assist Team Leaders get together via Zoom and explore where the common themes are in our respective presentations, perhaps generate a kind of consolidation document. Could be of considerable value for the client. Also highlight the different ideas. Doesn't need to be fancy.
- o Could we use the technology (Zoom) to have interest group discussions throughout the year?

Summary

In conclusion, we are very happy to share highlights (above) of the feedback obtained from the participants in the 19th ISPI EMEA conference held virtually (online via Zoom), October 1-3 and 5-6, 2020. As always, our participants played an enormous role in the success of the conference. We say this every year, only because it's true! An environment that supports an active role by participants, is the fundamental reason for keeping our conferences small in size. That is, participants don't just sit back and get talked at by presenters that hold themselves apart. Participants are just that. They are professionals that participate actively in sessions and contribute value based on their questions and comments within conference sessions as well as more informally, this year, in the Discussion Spaces, within Open Assist Teams, and by submitting questions for the Senior Executive Panel and becoming actively involved in the follow-on discussions from the Performance Improvement, Past, Present and Future panel session. Presenters, were very accessible via the Discussion Spaces in 2020 and generous with their time and insights again this year, which quite a while ago become the ISPI EMEA conference "culture." Also, as in prior years, it should be noted that all feedback was offered in a constructive manner.

We would like to thank Patron Sponsor, MMHA-the Managers' Mentors Inc., for ongoing encouragement and support, our technical support team from Flying Manta, our special 2020 Open Assist Client, Communicare, and we would like to thank our wonderful 2019 Open Assist Client (Wines of Macedonia) for valuable one-year-later feedback. We can't forget our Senior Executive and Performance Improvement - Past, Present and Future Panelists, ISPI EMEA Board and Conference Committee members, our great Briefing Session presenters, and, of course, our wonderful participants. In short, we thank all who contributed their time and talent toward making our 19th ISPI EMEA conference and 1st ever virtual event, a great success as a learning/sharing opportunity for all who participated, and for sharing important feedback to support our continuous improvement efforts.

The ISPI EMEA Board has been anticipating working with our colleagues at PMCG as our 2021 Host/Partner for an in-person conference in Tbilisi, Georgia. As everyone knows, Covid cases are greatly increasing throughout the world right now and the travel industry has suffered greatly as a result of the pandemic so far. We are about to begin work regarding the recruiting of 2021 Senior Executive Panelists and an Open Assist Client, as well as Briefing Session presenters. These roles must be filled whether our 2021 conference is delivered in-person, virtually or in a blended fashion. We are also in the process of combining and enhancing our www.ispi-emea.org website with our valuable Being Better Matters online resource. We will stay in touch about out plans for 2021 and we hope to see you, or, at least, hear from you in the coming year!

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Doing Things Right is not the Same as Doing the Right Thing

Steven J. Kelly CPT & M. Mari Novak CPT, Partners KNO Worldwide

ome years ago, we were asked by an international agency to spend some weeks in Central Asia, specifically Kyrgyzstan and Kazakhstan. We were tasked to look at several different programs there and to determine whether or not the donor agency we were working for might invest more money to improve its programming. They had an interest in utilizing this 'new kind' of capacity development methodology - performance improvement/organizational dynamics theory. They wanted to see whether they could be more effective while achieving increased sustainable results and how it might be included in their new five-year strategy.

We were asked to look at a wide variety of projects including health and business development programmes. A particularly complex program involved a cluster of different agricultural projects in the Fergana Valley in Kyrgyzstan. The reports on these activities were glowing with success. All indicators had been surpassed. Our assignment in this case was to do a quick assessment of the status and recommend strategies for potential phase 2 funding.

Kyrgyzstan is quite a small country bordering China in the North and at the very edge of Central Asia. Kyrgyzstan itself is mainly mountainous. It harbors a lot of natural resources but they have not been effectively accessed. There was a single goldmine which, at the time, accounted for 50% of the GDP of the whole country.

The Fergana Valley was first divided (to assure discord) by Stalin between what have since become three independent countries: Uzbekistan, Tajikistan and Kyrgyzstan. The valley had once belonged to Uzbekistan which is a power-house of a country of 40 million people. The valley is a source of continuing unrest between the people living along the borders who are competing for trade and water.

This assessment was interesting for several reasons. The economics of the area was mainly subsistence farming among small-holders. The agencies had come in with the objective of increasing crop yields mainly for the existing crop selection - fruit, vegetables, cotton and different types of grains. This meant the introduction of fertilizers, the use of upgraded machinery and other improved input to increase the yield. Aid agencies were involved but obviously fertilizer companies were also keen to subsidize the market in order to grow it. It was quite an ambitious project. They began to organize the farmers by creating a kind of farmers' union - the Association of Agribusinessmen of Kyrgyzstan - for the subsistence farmers who depended on selling their produce in local markets. An early focus was on increasing tomato production. Over a short period of just a few years the yields increased greatly. The project's indicators for increased use of inputs and increased yields at harvest were surpassed wildly.

However, unexpectedly to many, this was a disaster. Other government projects in the sector and other programs in the region, supported by international aid donors, were to focus in parallel on expanding export markets for agriculture including tomatoes. This effort had been stillborn due to various political and technical factors. Thus the explosion of tomato yield created a large surplus on the internal and regional markets. There was no scheme to export tomatoes. Prices were crushed because there was now a far greater supply than was needed for the local population of a quickly perishable fruit. With only a few processing plants (there had not been success in attracting foreign investment for food processing factories), this created a crisis. Along with the financial shortfall for the larger growers, there was an even worse impact. For decades, small private freeholds among the poor grew crops (along with tomatoes) in small plots to sell in the local farmer markets. Given the glut of the harvest, prices dropped over 80%. So the end macro outcome in-country was a further collapse in family income and more poverty among the poorest people. Several other parallel (in actuality, linked) projects then failed, so that the 'beneficiaries' suffered in many aspects.

What we found was that these various development aid programs were never really managed as an integrated whole. They were all stand-alone, with check-lists measuring progress by indicators that were good for the specific project itself but did not provide worthwhile data for the sector or the overall situation. While the indicators were quite useful for the individual program, they missed the macro view and were measuring the wrong things for the goal of reducing poverty. No one looked at, devised or considered the program to be a complex system.

Interestingly, this lack of integration and cooperation extended even to the physical arrangements within one of the main aid donor's facilities. During our visit, we found that the programs for two sectors - agriculture and the other economic development - were under separate managers. More striking, the offices where these projects were being run had two sets of locked doors between the sections, for security purposes. If one actually wanted to go and talk to a colleague and discuss the overlap, or the unintended consequences, it was literally very difficult to get the keys to visit and transit within the office.. So information sharing just did not happen very often, except for casual conversation in the canteen.

Physically – strategically and managerially -- the administration of these projects were siloed. Projects were set up as standalone -- and successful by the measurement of selected indicators. Unfortunately, the end result of a non-systemic approach turned out to be dismal failure. And catastrophic for the 'beneficiaries'. But the projects' checklists was all ticked off. That was apparently good enough for all responsible. Things did not get better in Kyrgyzstan.

WHAT IS GOING TO HAPPEN IF YOU ARE SUCCESSFUL?

Perspective is important. If you look at something very close up with narrow indicators it can give you a very different result, compared to considering the broader (complex) picture. Surely, designing and managing systemically is what you have to do when you are working to support reforms for upgrading an economy or transitioning citizen services nationwide; that is, having an impact on peoples' lives. It is difficult to achieve the right outcome when people do not get rewarded for considering that what they do must be broadly sustainable or for taking them integrated, complex view. Incentives for action must interlink across plans and projects.

We were able to recommend a more integrated approach for the contracting donor agency at the point when they were starting a new 5-year planning cycle. We completed our diagnostic, made recommendations and we have been periodically back to the region. There were apparently some lessons learned but very limited change of approach, nor recognition that the bigger picture and interlinking strategy are critical elements of advanced planning. That lesson has not been well learned.

Few sectoral technical experts have the expertise or often do not have the experience in complexity theory, organisational design and dynamics to enable them to understand that these things are priorities and have to be constructed into the plan and decision making. Everybody wants the trend, their results to go 'up and to the right' (on the graph), so the same mistakes are made again and again. The result has been for every step forward that is taken with one individual project, there are often two steps backwards in unintended consequences that create unexpected and sometimes negative consequences for another element of the overall picture.

Proper planning and implementation require an integrated consideration. It slows down the process a bit. Most often project planning is done considering current conditions. Then the program's requirements are cast in stone once the funding is approved. Why are flexibility band iterations required? While the program is churning through approvals nothing else is static. Time lags ignore the dynamics on the ground. Leadership grasps these dynamics; management designs programs with this information. That, in turn, requires trust at multiple levels: development and project work is a live process, responsive to a changing context. Are you in such a hurry not to take time to consider these vital aspects of managing successfully?

Kyrgyzstan was a dramatic example of the missteps that happen all the time on different scales. The weaknesses affected the lives of tens of thousands of people because no one sat down and had the meeting that said 'What is going to happen if you are successful with your project? How will it impact on us?' No one ever asked those essential questions in the Fergana Valley.

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Professional Credentials: A Strategy for ISPI

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The Need

s a nation, the United States of America, ranks 7th in literacy, 22nd in science, and 27th in math. Our educational system has been unable to prepare the workforce for today's jobs. The shortage in skilled workers is not unique to the USA. According to economic researchers and futurists including McKinsey Global Institute, Price Waterhouse Cooper, the Bureau of Labor Statistics, and others:

- 40% jobs will be eliminated or changed by 2030
- 77% of CEO's struggle to find job candidates with the required creativity and innovation skills; skills required for adaptability
- 94% of Fortune 1000 companies are facing supply chain disruptions
- Gig economy expected to exceed 43% of the workforce

The world of work is increasingly complex and new fields are emerging; fields that lack formal or easily accessible paths to proficiency. The new work and its core competencies are evolving in response to advancements in technology, our global interdependence, and our search economic equity and social and environmental sustainability. As a result, there is a global shortage of skilled workers. One because traditional fields of work have not attracted newcomers. Two because there are no established paths to learning the new work.

According to the U.S Department of Labor six million jobs are vacant due to a shortage of skilled workers. The European Union is pushing for universal standards to promote the movement of skilled workers across borders. Asia and the middle east are asking to partner with our trades and adopt our building codes to support their aggressive building efforts.

The global skills shortage is estimated in the millions and the skill shortage goes beyond technical skills. We work in a global knowledge economy. Anything that can be automated will be, so the work left for humans is more complex AND requires deep domain knowledge and abstract

According to the business magazine INC, the World Economic Forum, the American Society for Association Executives, and Credly, the largest bestower of credentials in the world, the most needed skills are:

- 1. Adaptability
- 2. Creativity (innovation, problem solving, ingenuity)
- 3. Collaboration (agreeableness, interpersonal, cultural sensitivity, empathy, humility, mutuality- we are partners in this endeavor)
- 4. Communication (persuasion, literacy, listening, questioning, reading non-verbal)
- 5. Critical Thinking (risk assessment, drawing on past knowledge, continuous learning)
- 6. Time Management (setting priorities, meeting commitments, accountability)
- 7. Manners (social etiquette, social cues)

A Solution: Credentials

The global skill shortage is driving the demand for new standards and competence in those standards. According to a study conducted by Georgetown University, certifications are the most common post-secondary award in the United States. Credly reports every second of every business day someone is opening its website to get a credential or find out what it takes to earn a credential one. Over one million certifications are awarded each year. One-third of certificate holders also have an associate, bachelor's, or graduate degree. Certifications are the new currency for career advancement. More students are earning certificates along with their degree.

Case example: When Veronika was awarded her master's degree in finance, she also had earned two certificates - One in Bloomberg Market Concepts and the other from the University of Montreal in IVADO-BIAS-200 Bias and Discrimination in Al. Two years after graduation, she was awarded the Certified Performance Technologist (CPT).

Who is awarding credentials? There are four groups offering credentials. The first consists of trade and professional associations like ISPI who want to help their members distinguish themselves in the job market or provide career advancement. The second group consists of colleges and universities who are offering credentials to non-degree seeking students. Universities want to service adults for whom a college degree is not feasible or unnecessary. The third group consists of vendors of technical products who want to qualify the users of their products. The fourth group is corporations who are awarding credentials to employees, customers, suppliers, and aftermarket partners such as dealers, distributors, outsourced customer service representatives, and the like. The motive for vendors and corporations is to protect their brand image, extend their market reach, reduce the cost of sales and service, and mitigate the risk of misuse or damage to complex, expensive products.

Why credentials? Employers are asking for credentials to help them identify job candidates more likely to succeed. Also, people want to distinguish themselves, be more competitive, have their expertise validated and recognized. People who do new work as in non-traditional jobs, seek alternatives to learning the skills and knowledge required for a job. The cost of post high school degrees is increasingly cost prohibitive. Having a credential enables people to stand out from the crowd and be part of a professional community.

The increasing demand for credentials has also triggered the development of certificates and microcredentials that may or may not come with digital badges. Five factors distinguish one type from another type:

- A. Time limitation:
 - Does the credential expire and need to be renewed?
 - Is maintenance, such as continuing education, ongoing experience or practice required?
- B. Purpose:
 - Is the intent to develop skills and knowledge?
 - Is the intent to confirm possession of skills, knowledge, or competence?
- C. Assessment:
 - Is taking and passing a test or an assessment required?
 - If yes, what is the test or assessment based on learning content or results of a job study?
- D. Oversight:
 - Is the group who manages the credential an independent body or part of marketing, HR, quality assurance, and the like?
- E. Mark of Achievement
 - What symbol is given to those who earn the credential, such as a certificate of completion, a registered mark (CPT), or a digital badge?

As shown in Table A, the differences are not always clear.

	Table A Comparison of Different Types of Credentials						
	Certificates	Micro-credentials			Certifications		
A.	Do not expire; maintenance is	A.	May or may not expire, may or	Α	. Must expire and must require		
	not required.		may not require maintenance		maintenance.		
В.	Are developmental in purpose.		or renewal.	В.	Purpose is to confirm		
C.	Usually do not require taking	В.	Purpose is developmental.		satisfaction of professional		
	or passing a test, but if they do,	C.	Assessment is usually not		standards		
	the test assesses attainment of		required, but if done it	C.	Requires the use of a validated		
	the training objectives.		measures the attainment of the		test to assess skills, knowledge,		
D.	Oversight done by marketing,		learning objectives.		or performance. The content of		
	HR, or quality assurance.	D.	Independent oversight is rarely		the test is derived from a job,		
E.	May or may not give a		done, but if done, it is usually in		task, practice, or cognitive study		
	registered mark. Does give a		concert with a certification	D.	Must have independent		
	certificate of completion and		program		oversight.		
	may give a digital badge.	A.	Usually gives a badge to signify	Ε.	Give a registered mark upon		
			completion or passing a test		attainment, may also give a		
					certificate or digital badge.		

The Implications for ISPI

ISPI's members, and CPT's specifically, represent the people with the expertise to address the global need to upskill the world's workforce. Competence in the Human Performance Technology (HPT) standards equips us to build paths to proficiency and then help clients recognize that proficiency with new ways of assessment. There needs to be more of us.

The situation presents an ideal opportunity for ISPI as The Voice of professionals in performance improvement, to expand its offerings of credentials. For example, ISPI could offer certificates and, perhaps micro-credentials, designed to help people gain proficiency in the enabling skills of human performance improvement. The topics could cover the processes used by practitioners such as needs analysis, cause analysis, solution design principles, program implementation, and program evaluation. ISPI could also recognize programs offered by academic institutions and for-profit organizations in the systematic process or other enabling disciplines such as change management, project management, instructional design, instructional technology, and the like.

Secondly, is the opportunity for ISPI to better promote how the CPT measures people's ability to effectively perform ill-structured work. The challenges facing the world do not lend themselves to traditional solutions. Instead they require collaboration, innovation, and critical thinking – the skills required for ill-structured work.

Typically, certifications are designed for people who do structured work under similar circumstances. However, this is not true for those who earned the CPT. Instead, practitioners of HPT are expected to handle a wide number of variables affecting the work, workforce, workplace, and marketplace, or more simply their work is complex and ill-structured. This presents a challenge to assessing the projects submitted by candidates for the Certified Performance Technologist CPT). For example, CPTs must consider variables in the work when solving performance problems that include:

- Variance in the sophistication, maturity, and uniformity of adoption of work processes:
- Variance in the sophistication, maturity, and uniformity of adoption of work technologies
- The degree work tasks are standardized with well-defined procedures

Their solutions must accommodate factors in the workforce that add complexity such as:

- Variance in the skill levels ranging from masters, journeymen, unskilled,
- Variance in work relationships ranging from friendly, hostile, to mixed.

Their solutions must accommodate factors in the workplace that add complexity include:

- The maturity and competitiveness of products
- The complexity of organizational structures
- The effectiveness and agility of leadership

CPTs must identify these variables so their proposed solutions are implementable and effective. Accommodating these variables increases the odds the solutions will have a lasting effect. Tables B and C shows different profiles for two organizations. The highlighted cells reflect the differences between the two organizations.

Table B: Organization X						
Workfo	Workforce		Workplace			
Skill level	Relations		Leadership Direction	Products		
Very skilled	Respectful	Mature Processes	Consistent	New One main		
Mixed	Mixed	Mixed	Conflicting	Mature	Few related	
New to job	Hostile	Immature Processes	Ever changing	Out of date	Mixed or unrelated	

Table C: Organization Y						
Workforce Work		Workplace				
Skill level	Relations		Leadership Direction	Products		
Very skilled	Respectful	Mature Processes	Consistent	New One main		
Mixed	Mixed	Mixed	Conflicting	Mature	Few related	
New to job	Hostile	Immature Processes	Ever changing	Out of date	Mixed or unrelated	

There are variables in the marketplace that also affect the probability that solutions with result in the desired change in behavior and outcomes. For example, organizations function under different marketplace conditions including:

• Their relationship with the media and government

- The size of their market
- The strength of the competition
- The profile of their customers

Tables D and E describes scope and range of factors in the marketplace that add complexity.

Table D Marketplace Factors for Organization X							
N	Market Conditions			Customer Profile			
Relations	Market size	Competition	Diversity	History	Relations		
Helpful	Local	Few	One industry	Long term	Friendly		
Mixed	National	Growing	Few industries	Growing	Changing		
Hostile	Global	Aggressive	Multiple industries	Untapped	Demanding		

Table E Marketplace Factors for Organization Y						
Market Conditions			Customer Profile			
Relations	Market size Competition		Diversity	History	Relations	
Helpful	Local	Few	One industry	Long term	Friendly	
Mixed	National	Growing	Few industries	Growing	Changing	
Hostile	Global	Aggressive	Multiple industries	Untapped	Demanding	

People who are proficient in performance improvement principles and systematic process have the skills to identify needs and opportunities, diagnose contributing causes, design feasible solutions, and help clients implement those solutions. They have proven they can effectively address a range of variables facing the world of work and thus can do ill-structured problem solving.

So, what is the journey? Throughout the journey ISPI must better promote the HPT standards and those who have demonstrated the ability to satisfy them. Next, ISPI should develop innovative paths to proficiency in the practice of HPT. Those paths might include online institutes designed to help practitioners further develop and hone their skills, coupled with credentials for less experienced practitioners.

How might you benefit? Start by being part of the solution. Tell your story of how you practice the discipline and how clients have benefitted. Consider being part of the HPT in Action series. Help ISPI us get the message out. The more people know about your expertise, the more likely they will engage you and your peers. So, stand out! Make your mark! Go above and beyond. Join us in improving the world, one project at a time.

Judith Hale, CPT, PhD, CACP, CDT, and ibstpi Fellow, is the author of nine books on performance improvement. The Performance Consultant's Fieldbook: How to Improve Organizations and People, 2nd edition, is used as a text by numerous universities. Performance-Based Certification: How to Design a Valid, Defensible, Cost-Effective Program, 2nd edition, received the Outstanding Communication Award from ISPI in 2014. Judy has served as president and director of Certification for ISPI. She can be reached at Judy@HaleCenter.org.





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You may add your profile to the new website under the **Engage** tab. This provides a way for you to connect with other members.



We have "retired" the old ISPI P.O. Box because the post office closed the location, so we encourage you to use email for correspondence. The primary email remains **info@ispi.org**.

