Course Overview

This is the introductory course in the training and performance improvement (T&PI) curriculum. The two leading professional organizations, the Association for Talent Development (ATD), formerly the American Society for Training and Development (ASTD), and the International Society for Performance Improvement (ISPI), call the field you are being introduced to in this course, Human Performance Improvement (HPI) or alternatively Human Performance Technology (HPT). This course provides you with an overview of HPI/HPT theory and processes, including the history, foundational principles, and real-world applications that help improve individual and organizational effectiveness.

Each of the courses that follow will teach you each of these theories and practices again, but in more depth. Therefore, if this is your first course and you are taking it alone, you can expect that these theories and practices that will be visited again and again throughout the curriculum. Also, if you are taking this course at the same time as ED7641, you can expect to be learning about the same theorists at the same time in that course—just in more depth— and doing part of a different HPI/HPT project in that course—again in more depth.

Assignments

- **Week 2:** Selected Organization and Performance Problem – 10% of grade. *Scoring Guide* (link scoring guide here)
- **Week 3:** Organizational Analysis – 10% of grade. *Scoring Guide* (link scoring guide here)
- **Week 4:** Environmental Analysis – 10% of grade. *Scoring Guide* (link scoring guide here)
- **Week 5:** Gap and Cause Analyses – 10% of grade. *Scoring Guide* (link scoring guide here)
- **Week 6:** Intervention Selection – 10% of grade. *Scoring Guide* (link scoring guide here)
- **Week 7:** Intervention Implementation/Change Plan – 10% of grade. *Scoring Guide* (link scoring guide here)
- **Week 8:** Intervention Evaluation Plan – 10% of grade. *Scoring Guide* (link scoring guide here)
- **Week 9:** HPT Practice Case Study – 10% of grade. *Scoring Guide* (link scoring guide here)

Discussions

Participation in discussions will count for 20% of your final grade.

- **Week 1:** Peer review a draft of next week's assignment and discuss a working definition of human performance improvement.
- **Week 2:** Peer review a draft of next week's assignment and discuss a case study application of the HPT Model.
- **Week 3:** Peer review a draft of next week's assignment and discuss a case study analysis of organizational and environmental analyses.
- **Week 4:** Peer review a draft of next week's assignment and discuss a case study analysis of gap and cause analyses.
- **Week 5:** Peer review a draft of next week's assignment and discuss a case study analysis of intervention selection and sustainability.
- **Week 6:** Peer review a draft of next week's assignment and discuss a case study analysis of intervention implementation.
- **Week 7:** Peer review a draft of next week's assignment and discuss a case study analysis of intervention evaluation.
- **Week 8:** Peer review a draft of next week's assignment.
- **Week 9:** Discuss key concepts from the course and confirm that you saved your final project to your ePortfolio.
- **Week 10:** Discuss some of your professional strengths and strategies for continued professional development.

Course Competencies

To successfully complete this course, you will be expected to:

1. Analyze and diagnose systems for performance strengths and deficiencies.
2. Select and apply appropriate interventions to improve learning or performance.
3. Apply appropriate evaluation to workplace performance, learning strategies, and interventions.
4. Communicate the value of performance consulting within the field of HPI.
5. Communicate in a manner that is scholarly, professional, and consistent with expectations for members of the education profession.

3   Apply appropriate evaluation to workplace performance, learning strategies, and interventions.

4   Communicate the value of performance consulting within the field of HPI.

5   Communicate in a manner that is scholarly, professional, and consistent with expectations for members of the education profession.

Course Prerequisites

Prerequisite(s): ED5010 or EDD8010 or HRM5002. Cannot be fulfilled by prior learning assessment.

Syllabus >> Course Materials

Required

The materials listed below are required to complete the learning activities in this course.

Library

The following required readings are provided in the Capella University Library or linked directly in this course. To find specific readings by journal or book title, use Journal and Book Locator. Refer to the Journal and Book Locator library guide to learn how to use this tool.

- Hale, J. (2007). *The performance consultant's fieldbook: Tools and techniques for improving organizations and people* (2nd ed.). San Francisco, CA: Pfeiffer.
- Pershing, J. (Ed.). (2006). *Handbook of human performance technology: Principles, practices, and potential* (3rd ed.). San Francisco, CA: Pfeiffer.
- Rothwell, W. J., Hohne, C. K., & King. S. B. (2018). *Human performance improvement: Building practitioner performance* (3rd ed.). New York, NY: Routledge.
- Van Tiem, D., Moseley, J. L., & Dessinger, J. C. (2012). *Fundamentals of performance improvement: Optimizing results through people, process, and organizations* (3rd ed.). San Francisco, CA: Pfeiffer.

External Resource

Please note that URLs change frequently. While the URLs were current when this course was designed, some may no longer be valid. If you cannot access a specific link, contact your instructor for an alternative URL. Permissions for the following links have been either granted or deemed appropriate for educational use at the time of course publication.

- Association for Talent Development. (n.d.). Association for talent development. Retrieved from https://www.td.org/
- International Society for Performance Improvement. (n.d.). CPT performance standards. Retrieved from http://ispi.org/ISPI/Credentials/CRT_Cert/CPT_Standards.aspx
- International Society for Performance Improvement. (n.d.). Retrieved from http://www.ispi.org

Suggested

The following materials are recommended to provide you with a better understanding of the topics in this course. These materials are not required to complete the course, but they are aligned to course activities and assessments and are highly recommended for your use.

Optional

The following optional materials are offered to provide you with a better understanding of the topics in this course. These materials are not required to complete the course.

Projects

Project ❯❯ HPT Practice Case Study

Project Overview

When you are called in to solve a training problem, very rarely will the problem actually be something that can or should be solved by training. Usually the problem has little to do with the lack of skills or knowledge of the job performers. In most cases, the difficulties arise from the way the task, job, work process, or organization is structured, implemented, or managed. As Rummler and Brache (1995) noted, "Put a good performer against a bad system, and the bad system wins every time."

The HPI/HPT toolkit contains many techniques to identify the causes of performance problems, and many performance interventions that are designed to ameliorate these problems—all of which, by the way, are quicker, cheaper, and more effective than training. They include fixing the inputs to the performer, the way the performer's task is structured, the types of outputs the performer produces, the feedback and incentives the performer receives, the ways the performer is managed and measured, the way the work process is structured, and the way the organization is structured.

For this project, you will apply the following Human Performance Technology (HPT) Model to a practice case study that you will create. The goal is to use the model to solve a work environment performance problem.

Using the information from your practice case study and the tools and resources from the course, you will walk through the process to complete the following components from the HPT Model:

- Organizational Analysis.
- Environmental Analysis.
- Gap and Cause Analysis.
- Intervention Selection.
- Intervention Implementation/Change Management.
- Intervention Evaluation.

Your work will be done in a Final Project Template that contains the following sections:

- Introduction.
- Selected Organization and Performance Problem.
- Organizational Analysis.
- Environmental Analysis.
- Gap and Cause Analyses.
- Intervention Selection.
- Intervention Implementation/Change Plan.
- Intervention Evaluation.
- Value of HPT Application for the Organization.
- Conclusion.
- References.

You will have an opportunity to learn about these HPT Model steps and how they are applied through your study activities. These activities call for reviewing model implementation tools and resources and how they are used as you study and discuss selected case studies from the course readings.

After you learn how to implement specific HPT Model steps each week, you will then complete an assignment applying the process to your practice case study for the final project. Since you will be using a practice case study approach, these assignments will focus on honing process application skills and will not require actual performance consultation with the identified organization.

However, to be of maximum value, the performance improvement case study that you create should be as real and practical as possible (a performance problem from your current or previous work environment). This way as you complete the analyses, you will have sufficient background knowledge to make educated deductions regarding possible performance gaps, causes, and cultural considerations for interventions. Alternatively, if you feel you need additional background knowledge, you may call upon someone in the organization who would be willing to collaborate with you by providing further information regarding the performance challenge that you have identified. If you pursue this option, you will need to fully disclose the purpose, scope, and details of this assignment.

Practice Case Study for Final Project

Selecting the Organization and Performance Problem

In the first course assignment, you will choose the organization and performance problem for your practice case study. The following tips will help you select an appropriate organization and performance problem:

1. The organization you choose (current or previous work environment) can be for-profit, nonprofit, private, government, or even church-related. Your organization can be from any industry; for example, the military, hospitality, retail, education, manufacturing, technology, or financial industry. The point is this: Every organization usually has serious operational and people challenges or problems that are limiting or preventing productivity and success in reaching stated organizational goals.
2. The performance issue you choose for your case study should be serious enough that department or unit or staff productivity or goal achievement is being curtailed because of this problem.
3. However, while the performance issue should be serious enough to impact productivity or goal achievement, it should not be so large that it will become unmanageable.
4. Your case study performance issue should also be something very interesting and challenging to you. Ideally, you will be excited and motivated to work on this project in a problem-solving way.
5. This CANNOT, under any circumstances, be the same problem or project you used, or are using, in ED7641. This is a firm and non-negotiable guideline, developed by the designers and instructors of both classes for instructional purposes.
6. Unlike the problem/project for ED7641, this case study performance problem should be very limited in scope. It should be limited to one—or two, at most—departments in your organization and should involve a very small and simple process.
7. It might be a problem that you have been asked to develop training for, even though training will not necessarily solve the problem.

Examples of performance topics **NOT** to pick for your case study:

- New hire orientation or safety training (these are potential interventions, not performance problems, and these are typically mandated programs).
- Low morale (this is probably a symptom of the performance problem—not the specific performance problem that you want to analyze).
- Corporate strategic planning (the process is too big).
- Redesigning an entire production plant (too big for this course).
- Redesigning the entire supply chain for your company (too big and too many departments).
- Getting sales and production to work together (too complex).
- Improving standardized test scores (too complex).

Examples of performance problems that could work for your practice case study:

- Customer service rep errors when entering trouble ticket information continue to increase (surpassing error tolerance levels).
- Pharmaceutical sales reps are not meeting sales expectations.
- University financial aid office faces significant increase of student complaints regarding incorrect processing of financial aid forms.

- Fifth grade teachers are not achieving use of "necessary technology" expectations to teach the new math curriculum.
- Hospital emergency department faces ongoing and increasing compliance violations for its admissions process.

Project Requirements

To achieve a successful project experience and outcome, you are expected to meet the following requirements:

- Use the provided Final Project Template [DOCX] for submitting all course assignments. Continue to add each assignment into the corresponding section of the Final Project Template and submit your evolving/cumulative paper for each assignment.
- Continue to update the paper's table of contents, list of tables (if any), reference page, and appendices (if any), as you submit each assignment.
- Complete your final project paper using current APA style guidelines.
- Complete paper sections that include:
  ◦ Brief narrative introduction explaining the purpose of the section.
  ◦ Description of process (organizational analysis, gap analysis, cause analysis, et cetera).
  ◦ Tools, resources, theories used to complete process.
  ◦ Potential results from process application (given the practice case study situation).
  ◦ Lessons learned and observations about the applied process.

Sections listed in the Final Project Template contain additional, specific guidelines for completing each given section.

References

Rummler, G. A., & Brache, A. P. (1995). *Improving performance: How to manage the white space on the organization chart* (2nd ed.). San Francisco, CA: Jossey-Bass.

Unit 1 ≫ What Is HPI?

Introduction

Human Performance Improvement

Customers calling the support center for a large insurance company currently wait more than a minute before they speak to a customer support specialist. How could we identify the cause of this long wait, and what tools would we need to get customers connected with a support specialist faster?

Activities this week will provide you with an introduction to the evolution, concepts, and processes of Human Performance Improvement (HPI), as well as an overview of the Human Performance Technology (HPT) Model. The tools and strategies associated with HPI and HPT can be applied in any context where an organization wants to improve performance outcomes, whether a high school language arts curriculum, a college academic advising center, a training program on a military base, or a corporate onboarding initiative for new employees. For your course project, you will apply each phase of the HPT Model as you create your own practice case study based on a real-world performance issue in your current or a previous work environment. This week, you will select the organization and performance problem that will be the focus for your project.

To-Do List

- **Discussion:** Draft and submit next week's assignment, Selected Organization and Performance Problem, for peer review.
- **Discussion:** Participate in the course discussion board.
- **What You Need to Know:** Read about HPI, the HPT Model, and key areas of thinking in the field.
- **Prepare:** Review the requirements and expectations for the course project.
- **Plan:** Review how to access and use the ePortfolio tool.

Learning Activities

u01s1 - Activity Overviews

Discussion Overview

Peer Review

Post a complete draft of next week's assignment, Selected Organization and Performance Problem, so that you can receive feedback from your peers. Provide helpful and constructive feedback for two of your peers to help them improve their drafts.

Defining HPI

Discuss with your fellow learners how you would define Human Performance Improvement and its associated key concepts and theories.

u01s2 - What You Need to Know

The HPT Model

The Human Performance Technology Model is composed of several major phases that together comprise a systematic approach to identifying performance challenges and identifying and implementing effective solutions.

- View <u>Week 1 HPT Model</u>. Consider the relationships between the model's various stages.

Dr. Judith Hale is a leader in the field and author of one of your course texts, _The Performance Consultant's Fieldbook: Tools and Techniques for Improving Organizations and People_.

- View <u>Interview with Dr. Judith Hale</u>, a discussion of HPI and the performance consultant profession. Watch the following segments:
  - _"Why Do HPT?"_
  - "_The Performance Consultant's Fieldbook._"

Human Performance Improvement

In the Information Age, it has become critical for organizations to understand the key factors that drive human performance and how understanding these factors can be used to improve the ability of an organization to accomplish its goals and mission. Automation and data accessibility continue to have an impact on the need for quality work processes and a high-performance workforce. To this end, the field of human performance improvement continues to evolve. As Van Tiem, Moseley, and Dessinger (2012) explained: "Craftsmanship established standards; work design improved efficiency; quality focused on customer expectations; the ever-widening distribution of information enabled a global economy, and the people became more valuable to their organizations" (p. 3).

To learn more about the conceptual foundations of performance improvement, read the following:

- Van Tiem, D. M., Moseley, J. L., & Dessinger, J. C. (2012). _Fundamentals of performance improvement: Optimizing results through people, process, and organizations_ (3rd ed.). San Francisco, CA: Pfeiffer.
  - Chapter 1, "Overview of Performance Improvement," pages 3–34, which provides definitions for HPI, key terms in the field, background on major contributors and theorists, and overall concepts.
  - Chapter 2, "Performance Improvement/HPT Model—An Overview," pages 41–44, which offers a snapshot of the HPT Model and its major components for assessing performance problems and identifying and implementing interventions.
- Rothwell, W. J., Hohne, C. K., & King. S. B. (2018). _Human performance improvement: Building practitioner performance_ (3rd ed.). New York, NY: Routledge.
  - Chapter 1, "Laying the Foundation," pages 1–17, also defines HPI and describes the factors that drive human performance.

u01s3 - Prepare: Course Project

Your first assignment will be due in Week 2. This assignment will be the first component of your course project. Read the course project description for details on how to identify a current or previous work environment performance problem that you will use in a practice case study. Review the examples of possible performance problems and the final paper requirements.

After identifying the performance issue and background information to create your practice case study, you will submit this work as your first assignment next week. This practice case study will then continue to be your focus for the remaining assignments in the course (all of which build upon each other to complete your final project for the course).

The following tips will guide you through the final project process:

- Review the course project description. It lists the project components and their assigned percentage values.
- Become familiar with the sequence of the project components and when each component is due.
- Review the Final Project Template [DOCX], which you will be using to complete each assignment.
- Before you begin working on each assignment:
  1. Carefully review the assignment instructions and requirements.
  2. Study the assignment scoring guide, which contains detailed criteria used by the instructor to grade your assignment.
- Whenever necessary, contact the instructor for clarification and help with any learning activities.

Note: For each assignment, you will submit a complete rough draft for peer review in the week before the assignment is due. Before you submit the assignment for a grade, you will use your best judgment to apply the feedback from your fellow learners while revising your assignment.

u01d1 - Write Your Discussion Post

Peer Review: Selected Organization and Performance Problem

Your first assignment, Selected Organization and Performance Problem, is due next week. For this discussion activity, carefully review the assignment instructions in Week 2 and complete the following:

- Attach a complete draft of the assignment so that you can receive feedback from your peers.
- Provide helpful and constructive feedback for two of your peers to help them improve their drafts.

Respond to Your Peers

- After you have posted a complete draft of the assignment to the discussion board, review the drafts of two of your fellow learners and provide constructive feedback that might help them improve their drafts next week before they submit their assignments to be graded.
- Refer to the assignment scoring guide when making your suggestions and cite the grading criteria when appropriate.
- Review the Discussion Participation Scoring Guide to learn how the instructor will evaluate your discussion participation.

Course Resources

SOE Discussion Participation Rubric

u01d2 - Write Your Discussion Post

Defining HPI

After completing the text readings, reviewing media content and listening to the Judith Hale audio presentation, **write a 200–250 word description of HPI**:

- Provide your own brief definition of HPI and the HPT Model.
- Describe key concepts, theories, and major HPI contributors.
- Identify those HPI concepts that coincide with your knowledge of HPI when you enrolled in the course.
- Highlight those HPI concepts that surprised you, with brief explanations.

Response Guidelines

- Respond to the post of one other learner with clear writing, using proper grammar, spelling, and APA formatting.
- Respond substantially; integrate course readings to support key points and analysis.

Review the Discussion Participation Scoring Guide to learn how the instructor will evaluate your discussion participation.

Course Resources

SOE Discussion Participation Rubric

Unit 2 ›› Organizational Analysis

 Introduction

Needs and Opportunities

A school district hires a performance improvement consultant to help increase math teacher retention in grades 6–8. If you were that consultant, where would you begin? Reviewing the school district's mission statement? Interviewing teachers? Studying the turnover data and comparing it with nearby districts?

The study activities and discussions this week will provide you with opportunities to apply the HPT Model and to experience the value of this systematic and holistic approach. You will also create your own practice case study based on a real-world performance issue in your current or previous work environment. You will use this practice case study throughout the course to apply each phase of the HPT Model. Your performance analyses, intervention selection, and implementation plan will become the assignments and the components of your final project for the course.

To-Do List

- **Discussion:** Draft and submit next week's assignment, Organizational Analysis, for peer review.
- **Discussion:** Participate in the course discussion board.
- **Assignment:** Revise and submit this week's assignment, Selected Organization and Performance Problem, for a grade.
- **What You Need to Know:** Read about the role and application of organizational analysis in the HPT Model.

Learning Activities

u02s1 - Activity Overviews

Assignment Overview

Identify a performance issue and develop background information to create a practice case study when you revise and submit this week's assignment, Selected Organization and Performance Problem.

Discussion Overview

Peer Review

Post a complete draft of next week's assignment, Organizational Analysis, so that you can receive feedback from your peers. Provide helpful and constructive feedback for two of your peers to help them improve their drafts.

Applying the HPT Model

Discuss with your fellow learners how you would apply the HPT Model to address a performance issue.

u02s2 - What You Need to Know

The HPT Model

Continue to familiarize yourself with the model's systematic approach and major phases.

- View Week 2 HPT Model.
- Listen to Interview with Darlene Van Tiem 1 to hear a message about performance improvement and the HPT Model. Darlene Van Tiem, PhD, is another leader in the field and co-author of one of your course texts, *Fundamentals of Performance Improvement: Optimizing Results Through People, Process, and Organizations* (3rd ed.). Dr. Van Tiem is also a faculty member at Capella University.

Organizational Analysis

How does analyzing the organization serve the overall process?

- View NuPlant Case Study, an interactive version of a case study from Rummler's *Serious Performance Consulting According to Rummler*. (You will not need to access this text to review this interactive case study.) You will apply what you have learned in one of the week's discussions.

Learn more about organizational analysis by reading the following:

- Van Tiem, D. M., Moseley, J. L., & Dessinger, J. C. (2012). *Fundamentals of performance improvement: Optimizing results through people, process, and organizations* (3rd ed.). San Francisco, CA: Pfeiffer.
  - Chapters 4–5, "Overview of Performance Analysis" and "Organizational Analysis," pages 123–144. These chapters will provide you with a solid understanding of the performance analysis process and tools to apply the process.
- Rothwell, W. J., Hohne, C. K., & King. S. B. (2018). *Human performance improvement: Building practitioner performance* (3rd ed.). New York, NY: Routledge.
  - Chapter 2, "The Role of Analyst," pages 41–83. This reading also discusses models and tools for applying the HPI process (including models and concepts from the major HPI theorists).

u02a1 - Selected Organization and Performance Problem

Overview

This assignment is the first in a series of eight assignments that culminates in your final project, the HPT Practice Case Study. In this assignment, you will identify a performance issue and develop background information to create a practice case study. This practice case study will be your focus for each of the remaining assignments in the course.

- Week 2: *Selected Organization and Performance Problem.*
- Week 3: Organizational Analysis
- Week 4: Environmental Analysis.
- Week 5: Gap and Cause Analyses.
- Week 6: Intervention Selection.
- Week 7: Intervention Implementation/Change Plan.
- Week 8: Intervention Evaluation Plan.

- Week 9: HPT Practice Case Study.

Note: For each assignment, you will add new content to the Final Project Template [DOCX]. Download and review this document prior to beginning this assignment.

Instructions

Then complete the following in the "Selected Organization and Performance Problem" section of the Final Project Template:

- **Describe the purpose and content of the study in a brief introduction.**
  - Apply the HPT model as a conceptual framework.

- **Describe a specific performance issue to be addressed in the organization.**
  - Remember that a performance issue should focus on results, not behaviors.
  - For example, this performance issue is focused on results: "Phone sales reps are not meeting sales quotas." The sales quotas are the results.
  - On the other hand, this performance issue is focused on behaviors: "Sales rep teams are not communicating with each other." Communication between members of the sales rep team are the behaviors. The communication behaviors influence the sales quota results.

- **Describe the work setting where the problem exists**.
  - Include a pseudonym for the organization and a list of the kinds of products or services that it offers.
  - Describe the overall culture and provide a snapshot of the area where the performance issue exists (unit or department purpose and processes, including inputs and outputs and any major factors that may affect performance).

- **Describe sponsors, performers, and other stakeholders** impacting or impacted by a specific performance improvement in the organization.
  - Describe the roles/jobs most impacted by the performance improvement.
  - Describe current performance results and expected results after the improvement is implemented.
  - Identify the leaders who are committed to the performance improvement and would champion the implementation.

- **Explain HPT's expected performance improvement benefit** for the organization and the performer.
- **Communicate in a manner that is scholarly, professional, and consistent** with expectations for members of professional contexts.
  - Update the table of contents and reference page each time you add new content to the Final Project Template.
  - Integrate course readings to support HPI-related points and to strengthen the narrative.
  - Incorporate feedback that you received during last week's peer review.

Additional Requirements

In addition to the requirements outlined above, your assignment should meet the following:

- **Written communication:** Written communication should be scholarly, professional, and consistent with expectations for members of professional contexts.
- **APA format:** Follow current APA guidelines for style and format, including a cover page, headings, and a hanging indent for all citation entries. See the Capella Writing Center for more information about APA.
- **References:** Follow applicable instructions in the Final Project Template.
- **Length:** Follow applicable instructions in the Final Project Template.
- **Font and font size:** Times New Roman, 12 points.

Note: Your instructor may use the Writing Feedback Tool when grading this assignment. The Writing Feedback Tool is designed to provide you with guidance and resources to develop your writing based on five core skills. You will find writing feedback in the Scoring Guide for the assignment, once your work has been evaluated.

Competencies Measured

By successfully completing this assignment, you will demonstrate your proficiency in the following course competencies:

- **Competency 1: Analyze and diagnose systems for performance strengths and deficiencies.**
  - Describe the purpose and content of the study.
  - Describe a specific performance issue to be addressed in the organization.
  - Describe the work setting where the performance issue exists.

- **Competency 3: Apply appropriate evaluation to workplace performance, learning strategies, and interventions.**
  - Describe sponsors, performers, and other stakeholders impacting or impacted by a specific performance improvement in the organization.

- **Competency 4: Communicate the value of performance consulting within the field of HPI.**
  - Explain HPT's expected performance improvement benefit for the organization and the performer.

- **Competency 5: Communicate in a manner that is scholarly, professional, and consistent with expectations for members of the education profession.**
  - Communicate in a manner that is scholarly, professional, and consistent with expectations for members of professional contexts.

u02d1 - Write Your Discussion Post

Peer Review: Organizational Analysis

Your second assignment, Organizational Analysis, is due next week. For this discussion activity, carefully review the assignment instructions in Week 3 and complete the following

- Post a complete draft of the assignment so that you can receive feedback from your peers.
- Provide helpful and constructive feedback for two of your peers to help them improve their drafts.

Respond to Your Peers

- After you have posted a complete draft of the assignment to the discussion board, review the drafts of two of your fellow learners and provide constructive feedback that might help them improve their drafts next week before they submit their assignments to be graded.
- Refer to the assignment scoring guide when making your suggestions and cite the grading criteria when appropriate.

Review the Discussion Participation Scoring Guide to learn how the instructor will evaluate your discussion participation.

Course Resources

SOE Discussion Participation Rubric

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u02d2 - Write Your Discussion Post

Applying the HPT Model

You have completed your readings and your review of the NuPlant Case Study media that presents the situation and the performance problem. Post your responses to the following questions:

- How would you apply the HPT Model to address the NuPlant performance issue?
- How would you present the benefits of using of this approach to the NuPlant stakeholders?

Response Guidelines

- Respond to the post of one other learner with clear writing, using proper grammar, spelling, and APA formatting.
- Make sure your responses are substantive; integrate your readings to support key points and analysis.

Read the Discussion Participation Scoring Guide to learn how the instructor will evaluate your discussion participation.

Course Resources

SOE Discussion Participation Rubric

Unit 3 ❯❯ Work Environment Analysis

Introduction

Environments of Human Performance

A large publicly-traded company wants to retain more of its highly-skilled employees. What processes and tools would the company need to track employee motivation and its connection to work tasks, workplace culture, and the resources and material conditions that impact performance?

Before performance consultants can address a performance problem, they must clearly define the problem and the associated critical business issues. So the performance consultant must "understand how work environments and social systems in organizations shape performance" (Hale, 2007, p. 115). And it is important to analyze the degree to which these organizational systems are aligned to help solve the performance problem. One of the most valuable insights an HPI/HPT professional can provide to a client is a new way of looking at the organization—not as an organization chart, but as a system.

This week, you will continue to learn about performance analysis in the HPT model, specifically the role of an environmental scan (identifying performance issue, workflow, resources, support, and performer factors) as a further part of the performance analysis process. You will also study an environmental analysis in a case study concerning strategic performance management and then apply the environmental analysis to your individual practice case study.

Reference

Hale, J. (2007). *The performance consultant's fieldbook: Tools and techniques for improving organizations and people* (2nd ed.). San Francisco, CA: Pfeiffer.

To-Do List

- **Discussion:** Draft and submit next week's assignment, Environmental Analysis, for peer review.
- **Discussion:** Participate in the course discussion board.
- **Assignment:** Revise and submit this week's assignment, Organizational Analysis, for a grade.
- **What You Need to Know:** Read about the role of workplace analysis in the HPT Model.

Learning Activities

u03s1 - Activity Overviews

Assignment Overview

Describe critical internal and external organizational issues that impact your selected performance problem when you revise and submit this week's assignment, Organizational Analysis.

Discussion Overview

Peer Review

Post a complete draft of next week's assignment, Environmental Analysis, so that you can receive feedback from your peers. Provide helpful and constructive feedback for two of your peers to help them improve their drafts.

Organizational and Environmental Analyses

Discuss organizational and environmental analytical techniques with your fellow learners.

u03s2 - What You Need to Know

The HPT Model

Familiarize yourself with the role of workplace analysis in the HPT Model's systematic approach and major phases. Note how the performance analysis phase fits into the model and helps the performance consultant define what must be done to provide valuable products or services to the organization.

- View <u>Week 3 HPT Model</u>.

Environmental Analysis

Environmental analysis provides an opportunity for all stakeholders in the organization to get involved in the intervention. Learn more about the process and associated tools:

- Van Tiem, D. M., Moseley, J. L., & Dessinger, J. C. (2012). <u>*Fundamentals of performance improvement: Optimizing results through people, process, and organizations*</u> (3rd ed.). San Francisco, CA: Pfeiffer.
    - ◦ Chapter 6, "Environmental Analysis," pages 145–154. This chapter will provide you with a solid understanding of the workplace analysis process and tools to apply the process.
    - ◦ Case Study 1.2, "Strategic Performance Management in Georgia Education," pages 89–94. To prepare your response for this week's discussion, consider and take notes on the following while reading this case:
        - ▪ What might have been the outcome of this case study had Deb Page, the performance consultant, not conducted organizational and environmental analyses?
        - ▪ What type of questions do you think Page asked and what sort of tools do you think Page used to complete these analyses?
        - ▪ What stakeholders do you think she involved in these organizational and environmental analyses? Why?

- Hale, J. A. (2007). <u>*The performance consultant's fieldbook: Tools and techniques for improving organizations and people*</u> (2nd ed.). San Francisco, CA: Pfeiffer.
    - ◦ Chapter 6, "Environment and Norms," pages 115–136. This chapter discusses the importance of completing organizational and environmental analyses and provides tools for completing the process.

u03a1 - Organizational Analysis

Overview

This assignment is the second in a series of eight assignments that culminates in your final project, the HPT Practice Case Study:

- Week 2: Selected Organization and Performance Problem.
- *Week 3: Organizational Analysis.*
- Week 4: Environmental Analysis.
- Week 5: Gap and Cause Analyses.
- Week 6: Intervention Selection.
- Week 7: Intervention Implementation/Change Plan.
- Week 8: Intervention Evaluation Plan.
- Week 9: HPT Practice Case Study.

For each assignment, you will add new content to the Final Project Template document that you began working on at the beginning of the course. The final course project uses a practice case study approach, so the individual assignment components do not require actual performance consultation or data gathering within the identified organization.

Instructions

First, complete the following worksheet:

- <u>Organizational Analysis Survey Worksheet [DOCX]</u>.

Then complete the following the "Organizational Analysis" section of the Final Project Template

- **Relate the purpose and content of the assignment to the selected organization and performance issue in a brief introduction.**
    - ◦ Apply the HPT model as a conceptual framework.
    - ◦ Include a logical transition from your preceding assignment to this section.

- **Describe internal and external factors affecting business direction and performance.**
    - ◦ Identify critical issues for the organization, including the problem selected for your study.

- **Analyze what you have learned about your case study from this worksheet.**
    - ◦ Describe how weakness in mission, vision, values, goals, and strategies relate to the identified problem selected for your study.

- **Communicate in a manner that is scholarly, professional, and consistent with expectations for members of professional contexts.**
    - ◦ Integrate course readings to support HPI-related points and to strengthen the narrative.
    - ◦ Use your judgment or consult with your instructor to make appropriate revisions based on feedback that you have received.

◦ Update the table of contents and reference page each time you add new content to the Final Project Template.

Additional Requirements

In addition to the requirements outlined above, your assignment should meet the following:

- **Written communication:** Written communication should be scholarly, professional, and consistent with expectations for members of professional contexts.
- **APA format:** Follow current APA guidelines for style and format, including a cover page, headings, and a hanging indent for all citation entries. See the Capella Writing Center for more information about APA.
- **References:** Follow applicable instructions in the Final Project Template.
- **Length:** Follow applicable instructions in the Final Project Template.
- **Font and font size:** Times New Roman, 12 points.

Note: Your instructor may use the Writing Feedback Tool when grading this assignment. The Writing Feedback Tool is designed to provide you with guidance and resources to develop your writing based on five core skills. You will find writing feedback in the Scoring Guide for the assignment, once your work has been evaluated.

Competencies Measured

By successfully completing this assignment, you will demonstrate your proficiency in the following course competencies:

- **Competency 1: Analyze and diagnose systems for performance strengths and deficiencies.**
    ◦ Relate the purpose and content of the assignment to the selected organization and performance issue in a brief introduction.
    ◦ Describe internal and external factors affecting business direction and performance.

- **Competency 4: Communicate the value of performance consulting within the field of HPI.**
    ◦ Analyze insights into the case study gained from this assignment.

- **Competency 5: Communicate in a manner that is scholarly, professional, and consistent with expectations for members of the education profession.**
    ◦ Communicate in a manner that is scholarly, professional, and consistent with expectations for members of professional contexts.

u03d1 - Write Your Discussion Post

Peer Review: Environmental Analysis

Your third assignment, Environmental Analysis, is due next week. For this discussion activity, carefully review the assignment instructions in Week 4 and complete the following:

- Post a complete draft of the assignment so that you can receive feedback from your peers.
- Provide helpful and constructive feedback for two of your peers to help them improve their drafts.

Respond to Your Peers

- After you have posted a complete draft of the assignment to the discussion board, review the drafts of two of your fellow learners and provide constructive feedback that might help them improve their drafts next week before they submit their assignments to be graded.
- Refer to the assignment scoring guide when making your suggestions and cite the grading criteria when appropriate.

Review the Discussion Participation Scoring Guide to learn how the instructor will evaluate your discussion participation.

Course Resources

SOE Discussion Participation Rubric

u03d2 - Write Your Discussion Post

Organizational and Environmental Analyses

After reading and analyzing Case Study 1.2, "Strategic Performance Management in Georgia Education," on pages 89–94 in _Fundamentals of Performance Improvement_, respond to the following questions:

- What might have been the outcome of this case study had the performance consultant not conducted organizational and environmental analyses?
- What type of tools did the consultant use and which questions do you think the consultant asked to complete these analyses?
- Which stakeholders do you think she involved in these organizational and environmental analyses? Why?

Response Guidelines

- Respond to the post of one other learner with clear writing, using proper grammar, spelling, and APA formatting.
- Make sure your responses are substantive; integrate your readings to support key points and analysis.

Read the Discussion Participation Scoring Guide to learn how the instructor will evaluate your discussion participation.

Course Resources

SOE Discussion Participation Rubric

Unit 4 ≫ Gap and Cause Analyses

 Introduction

Optimal States and Actual States

When it was first offered, a popular information technology certificate program graduated more than 80 percent of students who enrolled. Over the past 24 months, the graduation rate in the program has declined to almost 60 percent. If the university offering the program wants to reverse this trend, how should they go about determining potential causes of this 20 percent gap between the actual and optimal graduation rates?

So far in this course, you have learned that there is merit to digging deeper into organizational performance problems. This week, you will learn to use a variety of proven methods designed to identify potential causes of performance gaps in any of the levels of an organization from worker and teamwork, to managers, policymakers, and directors. Gaps and their causes may also reveal issues in organizational structure, physical supports such as work settings or software, or unclear or conflicting policies and priorities.

To-Do List

- **Discussion:** Draft and submit next week's assignment, Gap and Cause Analyses, for peer review.
- **Discussion:** Participate in the course discussion board.
- **Assignment:** Revise and submit this week's assignment, Environmental Analysis, for a grade.
- **What You Need to Know:** Read about the role of gap and cause analyses in the HPT Model.

Learning Activities

u04s1 - Activity Overviews

Assignment Overview

Describe workplace, process, and performer factors that impact your selected performance problem when you revise and submit this week's assignment, Environmental Analysis.

Discussion Overview

Post a complete draft of next week's assignment, Gap and Cause Analyses, so that you can receive feedback from your peers. Provide helpful and constructive feedback for two of your peers to help them improve their drafts.

Gap and Cause Analyses

Discuss gap and cause analytical techniques with your fellow learners.

u04s2 - What You Need to Know

The HPT Model

Continue to familiarize yourself with the model's systematic approach and major phases. Note how sources of organizational performance issues may be as diverse as organizational inputs, processes, and outputs. Employing the HPT Model gives us the ability to look beyond surface symptoms to seek root causes of what is impacting performance.

- View Week 4 HPT Model.

Gap and Cause Analyses

Cause analysis (as part of the total performance analysis phase) is one of the most critical and strategic functions for the performance consultant. The skilled and experienced performance consultant will spend less time as a trainer and much more time talking to managers and other personnel to ask probing questions. Through this questioning and data-gathering process, the consultant uncovers information about the organization's challenges and needs so the precise causes of the performance deficiencies can be more easily identified. A well planned and thoughtfully communicated cause analysis process is an excellent predictor of a successful performance-improvement intervention. Many interventions fail or fall substantially short of organizational goals and stakeholder expectations because an accurate cause analysis was not performed after the initial gap analysis.

To learn more about gap and cause analyses, read the following:

- Van Tiem, D. M., Moseley, J. L., & Dessinger, J. C. (2012). _Fundamentals of performance improvement: Optimizing results through people, process, and organizations_ (3rd ed.). San Francisco, CA: Pfeiffer.
  - Chapters 7 and 8, "Gap Analysis" and "Cause Analysis," pages 155–178. These chapters will provide you with a solid understanding of the gap and cause analysis process and the tools to apply to each process.
  - Read Case Study 2.2, "Physician Performance Report Accuracy and Timeliness," pages 185–192. To prepare your response for this week's discussion, consider and take notes on the following while reading this case:
    - Which of the various approaches used by the performance consultant to identify gaps and causes do you feel would be most and least effective in your organization? Explain why.
    - How would you assess the performance consultant's approach (methods, tools, questions) for conducting the gap and cause analyses in this case study?
    - Would you have used different or modified approaches to conduct these gap and cause analyses? Explain.
- Hale, J. A. (2007). _The performance consultant's fieldbook: Tools and techniques for improving organizations and people_ (2nd ed.). San Francisco, CA: Pfeiffer.
  - Chapter 7, "Needs Assessment and Cause Analysis," pages 137–167. This reading discusses methods for conducting gap and cause analyses and provides tools and questions for completing each analysis.

u04a1 - Environmental Analysis

Overview

This assignment is the third in a series of eight assignments that culminates in your final project, the HPT Practice Case Study:

- Week 2: Selected Organization and Performance Problem.

- Week 3: Organizational Analysis.
- *Week 4: Environmental Analysis.*
- Week 5: Gap and Cause Analyses.
- Week 6: Intervention Selection.
- Week 7: Intervention Implementation/Change Plan.
- Week 8: Intervention Evaluation Plan.
- Week 9: HPT Practice Case Study.

Note: For each assignment, you will add new content to the Final Project Template document that you began using at the beginning of the course. The final course project uses a practice case study approach, so the individual assignment components do not require actual performance consultation or data gathering within the identified organization.

Instructions

Begin by completing the following worksheet:

- What Is Happening? Survey Worksheet [DOCX]

Then complete the following in the "Environmental Analysis" section of the Final Project Template

- **Relate the purpose and content of the assignment to the selected organization and performance issue in a brief introduction.**
    - ◦ Apply the HPT model as a conceptual framework.
    - ◦ Include a logical transition from your preceding assignment to this section.

- **Describe workplace, process, and performer factors affecting specific performance results in the organization.**
    - ◦ Assess relevant strengths and deficiencies of the work environment as they relate to your case study.

- **Analyze what you have learned about your case study from this worksheet.**
    - ◦ Identify specific factors that may be contributing to the problem you identified to study.

- **Communicate in a manner that is scholarly, professional, and consistent with expectations for members of professional contexts.**
    - ◦ Integrate course readings to support HPI-related points and to strengthen the narrative.
    - ◦ Use your judgment or consult with your instructor to make appropriate revisions based on feedback that you have received.
    - ◦ Update the table of contents and reference page each time you add new content to the Final Project Template.

Additional Requirements

In addition to the requirements outlined above, your assignment should meet the following:

- **Written communication:** Written communication should be scholarly, professional, and consistent with expectations for members of professional contexts.
- **APA format:** Follow current APA guidelines for style and format, including a cover page, headings, and a hanging indent for all citation entries. See the Capella Writing Center for more information about APA.
- **References:** Follow applicable instructions in the Final Project Template.
- **Length:** Follow applicable instructions in the Final Project Template.
- **Font and font size:** Times New Roman, 12 points.

Note: Your instructor may use the Writing Feedback Tool when grading this assignment. The Writing Feedback Tool is designed to provide you with guidance and resources to develop your writing based on five core skills. You will find writing feedback in the Scoring Guide for the assignment, once your work has been evaluated.

Competencies Measured

By successfully completing this assignment, you will demonstrate your proficiency in the following course competencies:

- **Competency 1: Analyze and diagnose systems for performance strengths and deficiencies.**
    - ◦ Relate the purpose and content of the assignment to the selected organization and performance issue in a brief introduction.
    - ◦ Describe workplace, process, and performer factors affecting specific performance results in the organization.

- **Competency 4: Communicate the value of performance consulting within the field of HPI.**
    - ◦ Analyze insights into the case study gained from this assignment.

- **Competency 5: Communicate in a manner that is scholarly, professional, and consistent with expectations for members of the education profession.**
    - ◦ Communicate in a manner that is scholarly, professional, and consistent with expectations for members of professional contexts.

u04d1 - Write Your Discussion Post

Peer Review: Gap and Cause Analyses

Your fourth assignment, Gap and Cause Analyses, is due next week. For this discussion activity, carefully review the assignment instructions in Week 5 and complete the following:

- Post a complete draft of the assignment so that you can receive feedback from your peers.
- Provide helpful and constructive feedback for two of your peers to help them improve their drafts.

Respond to Your Peers

- After you have posted a complete draft of the assignment to the discussion board, review the drafts of two of your fellow learners and provide constructive feedback that might help them improve their drafts next week before they submit their assignments to be graded.
- Refer to the assignment scoring guide when making your suggestions and cite the grading criteria when appropriate.

Review the Discussion Participation Scoring Guide to learn how the instructor will evaluate your discussion participation.

Course Resources

SOE Discussion Participation Rubric

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u04d2 - Write Your Discussion Post

Gap and Cause Analyses

After reading and analyzing Case Study 2.2, "Physician Performance Report Accuracy and Timeliness" on pages 185–192 of _Fundamentals of Performance Improvement_, please respond to the following questions:

- The performance consultant in this case study uses a variety of approaches for identifying gaps and causes. Which of these approaches do you feel would be most and least effective in your organization? Explain why.
- How would you assess the performance consultant's approach (methods, tools, questions) for conducting the gap and cause analyses in this case study?
- Would you have used different or modified approaches to conduct these gap and cause analyses? Explain.

Response Guidelines

- Respond to the post of one other learner with clear writing, using proper grammar, spelling, and APA formatting.
- Make sure your responses are substantive; integrate your readings to support key points and analysis.

Read the Discussion Participation Scoring Guide to learn how the instructor will evaluate your discussion participation.

Course Resources

SOE Discussion Participation Rubric

Unit 5 ❯❯ Intervention Selection

Introduction

Solutions and Change Efforts

Like all large organizations, hospitals have to track many items, from surgical supplies and medications to food and bed linens. Sometimes supplies on hand do not seem to match what is listed in inventory due to various causes, such as switching vendors, new software, or human error. How can the best solution for more accurate inventory be identified once the actual causes are found? Is the solution feasible, easy to implement, and cost-effective?

After considering a potentially large range of available HPI/HPT interventions, we must next select the appropriate kind for each performance problem based on its causes, and then design the specific intervention or interventions. Because HPI practitioners must know how to handle both training and non-training interventions, you will learn to use several selection tools that will help you choose the best intervention from a wide array of options. Once you decide on a performance intervention, it will need to meet several criteria. From an organizational standpoint, the intervention must produce measurable results while helping to achieve business results. In addition, the intervention must satisfy what project stakeholders want.

This week, you will focus on selecting an intervention based on its causes and organization systems while also ensuring its feasibility and sustainability. You will also have the opportunity to analyze an intervention selection in a case study before you apply what you learned about intervention selection to your own course project.

To-Do List

- **Discussion:** Draft and submit next week's assignment, Intervention Selection, for peer review.
- **Discussion:** Participate in the course discussion board.
- **Assignment:** Revise and submit this week's assignment, Gap and Cause Analyses, for a grade.
- **What You Need to Know:** Read about the role of selecting interventions in the HPT Model.

Learning Activities

u05s1 - Activity Overviews

Assignment Overview

Describe gaps and associated drivers or causes that impact your selected performance problem when you revise and submit this week's assignment, Gap and Cause Analyses.

Discussion Overview

Peer Review

Post a complete draft of next week's assignment, Intervention Selection, so that you can receive feedback from your peers. Provide helpful and constructive feedback for two of your peers to help them improve their drafts.

Intervention Selection

Discuss intervention selection techniques with your fellow learners.

u05s2 - What You Need to Know

The HPT Model

Interventions flow from cause analysis and precede implementation and evaluation in the model's systematic steps:

- View Week 5 HPT Model.

Intervention Selection

Training is an intervention (also known as a *solution*)—something we do to solve a performance problem. It may be the only kind of intervention you have known until now. Training is, however, a particular kind of intervention. It is designed to solve performance problems caused by a lack of skill or knowledge. The worker lacks knowledge or skill and the training helps the worker develop in these areas to perform successfully on the job.

But one of the major takeaways from our study of cause analysis is that not all performance problems are caused by skill or knowledge deficiencies. In fact, some experts estimate that fewer than 15 percent of performance problems are caused by lack of skills and knowledge. This means that a large percentage of the performance problems you encounter (such as those caused by lack of resources, lack of incentives, unclear expectations or inputs, task interference, or mismatched motivation and capacity), will not be improved by training.

As a result, there is a whole set of interventions that must be added to the HPI/HPT practitioner's repertoire. There are many different ways of classifying the full range of HPI/HPT interventions. Rothwell et al. (2018) use the following categories (with about 10 specific interventions for each category):

- Career development systems.
- Communication systems.
- Documentation and standards.
- Ergonomic and human factors.
- Feedback systems.
- Financial systems.
- Human development systems.
- Industrial engineering.
- Information systems.
- Instructional systems.
- Job and workflow redesign.
- Labor relations.
- Management science.
- Measurement and evaluation systems.
- Organization design and development.
- Quality improvement.
- Resource systems.
- Reward and recognition systems.
- Selection systems.

To learn more about evaluating a range of interventions, read the following:

- Rothwell, W. J., Hohne, C. K., & King. S. B. (2018). *Human performance improvement: Building practitioner performance* (3rd ed.). New York, NY: Routledge.
    - Chapter 3, "Selecting Interventions," pages 78–90.

- Van Tiem, D. M., Moseley, J. L., & Dessinger, J. C. (2012). *Fundamentals of performance improvement: Optimizing results through people, process, and organizations* (3rd ed.). San Francisco, CA: Pfeiffer.
    - Chapter 9, "Intervention Selection," pages 195–211, a review of intervention selection processes.
    - Chapters 10–17, pages 243–405, choose four chapters to read about specific interventions (learning, performance support, job analysis/work design, personal development, HRD, organizational communication, organization design, financial systems). Consider interventions that you know least about and read those specific chapters.
    - Case Study 3.1, "No Room for Error," pages 451–458.

To prepare your response for this week's discussion, take notes on the following while reading Case Study 3.1:

- Which steps taken by the performance consulting team do you feel led the way for the positive results and sustainability of the implemented interventions? Explain how these steps had positive impact.
- Had you been on this consulting team, which of the intervention-related performance support tools in *Fundamentals of Performance Improvement* would you have found helpful to make intervention recommendations for this case? In the discussion, you will explain why you would have chosen these tools. (You can find a list of performance support tools on page xxiii of the text. Focus on items 9.1 to 22.2.)

Reference

Rothwell, W. J., Hohne, C. K., & King, S. B. (2018). *Human performance improvement: Building practitioner performance* (3rd ed.) New York, NY: Routledge.

u05a1 - Gap and Cause Analyses

Overview

This assignment is the fourth in a series of eight assignments that culminates in your final project, the HPT Practice Case Study:

- Week 2: Selected Organization and Performance Problem.
- Week 3: Organizational Analysis.
- Week 4: Environmental Analysis.
- *Week 5: Gap and Cause Analyses.*
- Week 6: Intervention Selection.
- Week 7: Intervention Implementation/Change Plan.
- Week 8: Intervention Evaluation Plan.
- Week 9: HPT Practice Case Study.

For each assignment, you will add new content to the Final Project Template that you began working on at the beginning of the course. The final course project uses a practice case study approach, so the individual assignment components do not require actual performance consultation or data gathering within the identified organization.

Instructions

First complete the following worksheets:

- Gap Analysis Worksheet [DOCX].
- Probing for Drivers or Causes Worksheet [DOCX].

Then complete the following in the "Gap and Cause Analyses" section of the Final Project Template:

- **Relate the purpose and content of the assignment to the selected organization and performance issue in a brief introduction.**
  - Apply the HPT model as a conceptual framework.
  - Include a logical transition from your preceding assignment to this section.

- **Analyze gaps related to a project case study.**
  - Relate the gaps to organizational and/or environmental analyses completed for the study.

- **Describe drivers or causes of performance gaps related to a project case study.**
  - Relate the drivers or causes to organizational and/or environmental analyses completed for the study.

- **Communicate in a manner that is scholarly, professional, and consistent with expectations for members of professional contexts.**
  - Integrate course readings to support HPI-related points and to strengthen the narrative.
  - Use your judgment or consult with your instructor to make appropriate revisions based on feedback that you have received.
  - Update the table of contents and reference page each time you add new content to the Final Project Template.

Additional Requirements

In addition to the requirements outlined above, your assignment should meet the following:

- **Written communication:** Written communication should be scholarly, professional, and consistent with expectations for members of professional contexts.
- **APA format:** Follow current APA guidelines for style and format, including a cover page, headings, and a hanging indent for all citation entries. See the Capella Writing Center for more information about APA.
- **References:** Follow applicable instructions in the Final Project Template.
- **Length:** Follow applicable instructions in the Final Project Template.
- **Font and font size:** Times New Roman, 12 points.

Note: Your instructor may use the Writing Feedback Tool when grading this assignment. The Writing Feedback Tool is designed to provide you with guidance and resources to develop your writing based on five core skills. You will find writing feedback in the Scoring Guide for the assignment, once your work has been evaluated.

Competencies Measured

By successfully completing this assignment, you will demonstrate your proficiency in the following course competencies:

- **Competency 1: Analyze and diagnose systems for performance strengths and deficiencies.**
  - Relate the purpose and content of the assignment to the selected organization and performance issue in a brief introduction.
  - Analyze gaps related to a project case study.
  - Describe drivers or causes of performance gaps related to a project case study.

- **Competency 5: Communicate in a manner that is scholarly, professional, and consistent with expectations for members of the education profession.**
  - Communicate in a manner that is scholarly, professional, and consistent with expectations for members of professional contexts.

u05d1 - Write Your Discussion Post

Peer Review: Intervention Selection

Your fifth assignment, Intervention Selection, is due next week. For this discussion activity, carefully review the assignment instructions in Week 6 and complete the following:

- Post a complete draft of the assignment so that you can receive feedback from your peers.
- Provide helpful and constructive feedback for two of your peers to help them improve their drafts.

Respond to Your Peers

- After you have posted a complete draft of the assignment to the discussion board, review the drafts of two of your fellow learners and provide constructive feedback that might help them improve their drafts next week before they submit their assignments to be graded.
- Refer to the assignment scoring guide when making your suggestions and cite the grading criteria when appropriate.

Review the Discussion Participation Scoring Guide to learn how the instructor will evaluate your discussion participation.

Course Resources

SOE Discussion Participation Rubric

u05d2 - Write Your Discussion Post

Intervention Selection

After reading and analyzing Case Study 3.1, "No Room for Error," on pages 451–458 of *Fundamentals of Performance Improvement*, please respond to the following questions:

- Which steps taken by the performance consulting team do you feel led the way for the positive results and sustainability of the implemented interventions? Explain how these steps made a positive impact.
- Had you been on this consulting team, which of the intervention-related Performance Support Tools in *Fundamentals of Performance Improvement* (Tools 9.1–22.2 on pages xxiii–xxiv) would you have found helpful to make intervention recommendations for this case? Explain why you chose these tools.

Response Guidelines

- Respond to the post of one other learner with clear writing, using proper grammar, spelling, and APA formatting.
- Make sure your responses are substantive; integrate your readings to support key points and analysis.

Read the Discussion Participation Scoring Guide to learn how the instructor will evaluate your discussion participation.

Course Resources

SOE Discussion Participation Rubric

Unit 6 ›› Intervention Implementation and Change Management

Introduction

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Choosing an Implementation Model

A task force appointed by the dean of a research university has recommended a number of detailed changes to the process faculty and development leaders use to apply for grant funds. How can these changes best be introduced and explained to the hundreds of people in the organization who will have to do their jobs differently?

</div>

This week, you will focus on the role of the change manager in HPT and the stages of change in HPI projects. You will review tools for determining feasibility and sustainability of interventions and practice applying intervention implementation and change management to your individual practice case study. The discussion board will give you the opportunity to practice analysis of intervention implementation and change management in a case study concerning merging two banks.

To-Do List

- **Discussion:** Draft and submit next week's assignment, Intervention Implementation/Change Plan, for peer review.
- **Discussion:** Participate in the course discussion board.
- **Assignment:** Revise and submit this week's assignment, Intervention Selection, for a grade.
- **What You Need to Know:** Read about the role of change management when implementing HPT interventions.

Learning Activities

u06s1 - Activity Overviews

Assignment Overview

Describe and prioritize interventions that could impact your selected performance problem when you revise and submit this week's assignment, Intervention Selection.

Discussion Overview

Peer Review

Post a complete draft of next week's assignment, Intervention Implementation/Change Plan, so that you can receive feedback from your peers. Provide helpful and constructive feedback for two of your peers to help them improve their drafts.

Intervention Implementation for Large Organization

Discuss intervention implementation techniques with your fellow learners.

u06s2 - What You Need to Know

The HPT Model

Continue to familiarize yourself with the model's systematic approach and major phases. Note how intervention implementation and change management come into play as part of the model's systematic steps:

- View Week 6 HPT Model.
- View Interview with Dr. Darlene Van Tiem 2.

Intervention Implementation

The power of the systems approach has been demonstrated in the HPT Model's performance analysis and intervention selection phases. The implementation and follow-up phases will also require careful attention to details, critical thinking, and an appropriate investment of time.

- View Matrix of Strategies and Tactics. It contains a list of 19 categories of HPI/HPT interventions and the specific interventions that fall into each category.

The purpose of any performance intervention is to facilitate meaningful change to help employees and the organization reach their business goals. Practitioners usually invest significant efforts in planning and staging an intervention, but they too often think, "Once implementation occurs, my job is done." Nothing could be further from the truth. The fact is, good research and good solutions will not survive a poor implementation strategy. Research repeatedly shows that 80 percent of all training and performance improvement interventions fail because of insufficient resources, time, and energy invested in the process that occurs after implementation: the change process. Clearly, the change process for both individuals and organizations must occur before, during, and after an intervention to ensure the successful transfer of knowledge, skills, and attitudes.

To learn more about implementing interventions, read the following:

- Van Tiem, D. M., Moseley, J. L., & Dessinger, J. C. (2012). _Fundamentals of performance improvement: Optimizing results through people, process, and organizations_ (3rd ed.). San Francisco, CA: Pfeiffer.
    ◦ Chapter 3 and Chapters 18–20, "Change Management," "Intervention Design," "Making the Business Case," and "Intervention Development," pages 61–80 and pages 407–450. These chapters will explain the change process and how it relates to intervention design, development, and making the business case for the development.
    ◦ Case Study 3.2, "Acquisition of Westford Bank by Spring Harbor Bank," pages 459–464. To prepare your response for this week's discussion, consider and take notes on the following while reading this case:
        ▪ Which change-management principles did the project team apply to address the performance issues arising from the bank's latest acquisition? Identify the principles and explain why it was critical to apply them in this specific case.
        ▪ Had you been on this consulting team, which of the intervention-related performance support tools in _Fundamentals of Performance Improvement_ would you have found helpful to make intervention recommendations for this case? In the discussion, you will explain why you would have chosen these tools. (You can find a list of performance support tools on page xxiii of the text. Focus on items 9.1 to 22.2.)
- Rothwell, W. J., Hohne, C. K., & King. S. B. (2018). _Human performance improvement: Building practitioner performance_ (3rd ed.). New York, NY: Routledge.
    ◦ Chapter 4, "The Role of Change Manager," pages 102–116.

u06a1 - Intervention Selection

Overview

This assignment is the fifth in a series of eight assignments that culminates in your final project, the HPT Practice Case Study:

- Week 2: Selected Organization and Performance Problem.
- Week 3: Organizational Analysis.
- Week 4: Environmental Analyses.
- Week 5: Gap and Cause Analyses.
- _Week 6: Intervention Selection._
- Week 7: Intervention Implementation/Change Plan.
- Week 8: Intervention Evaluation Plan.
- Week 9: HPT Practice Case Study.

Note: For each assignment, you will add new content to the Final Project Template that you began working on at the beginning of the course. The final course project uses a practice case study approach, so the individual assignment components do not require actual performance consultation or data gathering within the identified organization.

Instructions

First complete the following worksheet:

- Intervention Priority Worksheet [DOCX].

Then complete the following in the "Intervention Selection" section of the Final Project Template:

- **Relate the purpose and content of the assignment to the selected organization and performance issue in a brief introduction.**
    ◦ Apply the HPT model as a conceptual framework.
    ◦ Include a logical transition from your preceding assignment to this section.

- **Describe appropriate interventions to close performance gaps.**

- Explain rationale for the interventions based on HPI concepts.
- **Prioritize interventions that allow organizations to sustain expected improvements.**
  - Discuss what you have learned about selecting interventions based on gap and cause analyses.
- **Communicate in a manner that is scholarly, professional, and consistent with expectations for members of professional contexts.**
  - Integrate course readings to support HPI-related points and to strengthen the narrative.
  - Use your judgment or consult with your instructor to make appropriate revisions based on feedback that you've received.
  - Update the table of contents and reference page each time you add new content to the Final Project Template.

Additional Requirements

In addition to the requirements outlined above, your assignment should meet the following:

- **Written communication:** Written communication should be scholarly, professional, and consistent with expectations for members of professional contexts.
- **APA format:** Follow current APA guidelines for style and format, including a cover page, headings, and a hanging indent for all citation entries. See the Capella Writing Center for more information about APA.
- **References:** Follow applicable instructions in the Final Project Template.
- **Length:** Follow applicable instructions in the Final Project Template.
- **Font and font size:** Times New Roman, 12 points.

Note: Your instructor may use the Writing Feedback Tool when grading this assignment. The Writing Feedback Tool is designed to provide you with guidance and resources to develop your writing based on five core skills. You will find writing feedback in the Scoring Guide for the assignment, once your work has been evaluated.

Competencies Measured

By successfully completing this assignment, you will demonstrate your proficiency in the following course competencies:

- **Competency 1: Analyze and diagnose systems for performance strengths and deficiencies.**
  - Relate the purpose and content of the assignment to the selected organization and performance issue in a brief introduction.
- **Competency 2: Select and apply appropriate interventions to improve learning or performance.**
  - Describe appropriate interventions to close performance gaps.
  - Prioritize interventions that allow organizations to sustain expected improvements.
- **Competency 5: Communicate in a manner that is scholarly, professional, and consistent with expectations for members of the education profession.**
  - Communicate in a manner that is scholarly, professional, and consistent with expectations for members of professional contexts.

u06d1 - Write Your Discussion Post

Peer Review: Intervention Implementation/Change Plan

Your sixth assignment, Intervention Implementation/Change Plan, is due next week. For this discussion activity, carefully review the assignment instructions in Week 7 and complete the following:

- Post a complete draft of the assignment so that you can receive feedback from your peers.
- Provide helpful and constructive feedback for two of your peers to help them improve their drafts.

Respond to Your Peers

- After you have posted a complete draft of the assignment to the discussion board, review the drafts of two of your fellow learners and provide constructive feedback that might help them improve their drafts next week before they submit their assignments to be graded.
- Refer to the assignment scoring guide when making your suggestions and cite the grading criteria when appropriate.

Review the Discussion Participation Scoring Guide to learn how the instructor will evaluate your discussion participation.

Course Resources

SOE Discussion Participation Rubric

u06d2 - Write Your Discussion Post

Intervention Implementation for Large Organization

After reading Case Study 3.2, "Acquisition of Westford Bank by Spring Harbor Bank," on pages 459–464 of _Fundamentals of Performance Improvement_, respond to the following questions:

- Which change management principles did the project team apply to address the performance issues arising from the bank's latest acquisition? Identify the principles and why it was critical to apply them in this specific case.
- Had you been on this project team, which of the intervention-related Performance Support Tools in _Fundamentals of Performance Improvement_ (Tools 9.1–22.2 on pages xxiii–xxiv) would you have found helpful to make intervention recommendations for this case? Explain why you chose these tools.

Response Guidelines

- Respond to the post of one other learner with clear writing, using proper grammar, spelling, and APA formatting.
- Make sure your responses are substantive; integrate your readings to support key points and analysis.

Read the Discussion Participation Scoring Guide to learn how the instructor will evaluate your discussion participation.

Course Resources

SOE Discussion Participation Rubric

Unit 7 ›› Evaluating Interventions

 Introduction

Types of Evaluation

If military leaders want to determine the impact made by recent changes in physical conditioning at the base, what are some of the tools they could use to evaluate this intervention? How would such evaluation tools be implemented differently, and how would the data differ?

This week, you will explore the theory, principles, and tools that will help you meet the evaluation requirement for any performance improvement intervention. You will learn why evaluation is such a challenge to HPI professionals and, most importantly, how to meet these challenges. You will learn how evaluation plays a key role in the HPT Model and an essential role in achieving positive organizational results.

To-Do List

- **Discussion:** Draft and submit next week's assignment, Intervention Evaluation Plan, for peer review.
- **Discussion:** Participate in the course discussion board.
- **Assignment:** Revise and submit this week's assignment, Intervention Implementation/Change Plan, for a grade.
- **What You Need to Know:** Read about the role of intervention evaluation in the HPT Model.

Learning Activities

u07s1 - Activity Overviews

Assignment Overview

Apply the implementation of an intervention that could impact your selected performance problem when you revise and submit this week's assignment, Intervention Implementation/Change Plan.

Discussion Overview

Peer Review

Post a complete draft of next week's assignment, Intervention Evaluation Plan, so that you can receive feedback from your peers. Provide helpful and constructive feedback for two of your peers to help them improve their drafts.

Intervention Evaluation

Discuss intervention evaluation techniques with your fellow learners.

u07s2 - What You Need to Know

The HPT Model

Continue to familiarize yourself with the model's systematic approach and major phases. Note the role that evaluation plays when applying the model:

- View Week 7 HPT Model.

Evaluation

Training and performance improvement professionals should engage in reflective practice (the practice of thinking about what you do and incorporating lessons learned in future projects) by asking the following questions:

- What exactly was the intervention supposed to change?
- How do you actually evaluate training or non-training interventions?
- What are the ethical issues involved in evaluating T&PI interventions?
- To what extent can the value of interventions be expressed in terms of costs and benefits or dollars and cents?
- What non-monetary results matter to the organization?

One of the most persistent habits of HPI practitioners is a failure to appropriately evaluate the results of their interventions. HPI professionals everywhere are being challenged to be accountable and to produce hard data to demonstrate the value of their interventions, programs, and services. Evaluation, then, is one of the most strategic actions a trainer and other performance improvement professional can take. In evaluation, we tie together all of our efforts and demonstrate that we truly add value to the organization.

Learn more about evaluation by reading the following:

- Hale, J. A. (2007). _The performance consultant's fieldbook: Tools and techniques for improving organizations and people_ (2nd ed.). San Francisco, CA: Pfeiffer.
    - Chapter 9, "Measuring Results," pages 199–216. This reading explains the different types of evaluation and metrics used to assess intervention effectiveness.
- Van Tiem, D. M., Moseley, J. L., & Dessinger, J. C. (2012). _Fundamentals of performance improvement: Optimizing results through people, process, and organizations_ (3rd ed.). San Francisco, CA: Pfeiffer.
    - Chapter 23, "Overview of Evaluations," pages 529–543.
    - Chapter 24, "Planning and Conducting Evaluation," pages 545–569.
    - Case Study 5.2, "Community Healthcare Association of the Dakotas: A Five-Level Evaluation Model," pages 577–584. To prepare your response for this week's discussion, consider and take notes on the following while reading this case:
        - Which type of evaluation (formative, summative, confirmative, meta) did the consulting team use in this case study? Identify the type of evaluation and describe specifically how and when they applied it (for example, during the performance analysis phase or the intervention design/development phase or the intervention implementation/maintenance phase)?
        - Had you been on this consulting team, which evaluation methods or tools from your readings would you have found helpful for this case? Explain why.
- Rothwell, W. J., Hohne, C. K., & King. S. B. (2018). _Human performance improvement: Building practitioner performance_ (3rd ed.). New York, NY: Routledge.

◦ Chapter 5: "The Role of the Evaluator," pages 147–173. This reading provides descriptions and examples of evaluation methods.

u07a1 - Intervention Implementation/Change Plan

Overview

This assignment is the sixth in a series of eight assignments that culminates in your final project, the HPT Practice Case Study:

• Week 2: Selected Organization and Performance Problem.
• Week 3: Organizational Analysis.
• Week 4: Environmental Analyses.
• Week 5: Gap and Cause Analyses.
• Week 6: Intervention Selection.
• *Week 7: Intervention Implementation/Change Plan.*
• Week 8: Intervention Evaluation Plan.
• Week 9: HPT Practice Case Study.

For each assignment, you will add new content to the Final Project Template document that you began working on at the beginning of the course. The final course project uses a practice case study approach, so the individual assignment components do not require actual performance consultation or data gathering within the identified organization.

Instructions

First complete the following worksheets:

• Change Management Planner [DOC].
• Evaluating Sustainability From a Change Management Perspective [DOC].

Then complete the following in the "Intervention Implementation/Change Plan" section of the Final Project Template:

• **Relate the purpose and content of the assignment to the selected organization and performance issue in a brief introduction.**
   ◦ Apply the HPT model as a conceptual framework.
   ◦ Include a logical transition from your preceding assignment to this section.

• **Apply change process to intervention implementation.**
   ◦ Identify relevant stages of planning for change.

• **Describe factors affecting sustainability of changes due to the proposed interventions in your case study.**
   ◦ Evaluate the sustainability of change due to intervention.

• **Analyze what you have learned about change management and change sustainability.**
   ◦ Provide relevant examples.

• **Communicate in a manner that is scholarly, professional, and consistent with expectations for members of professional contexts.**
   ◦ Integrate course readings to support HPI-related points and to strengthen the narrative.
   ◦ Use your judgment or consult with your instructor to make appropriate revisions based on feedback that you have received.
   ◦ Update the table of contents and reference page each time you add new content to the Final Project Template.

Additional Requirements

In addition to the requirements outlined above, your assignment should meet the following:

• **Written communication:** Written communication should be scholarly, professional, and consistent with expectations for members of professional contexts.
• **APA format:** Follow current APA guidelines for style and format, including a cover page, headings, and a hanging indent for all citation entries. See the Capella Writing Center for more information about APA.
• **References:** Follow applicable instructions in the Final Project Template.
• **Length:** Follow applicable instructions in the Final Project Template.
• **Font and font size:** Times New Roman, 12 points.

Note: Your instructor may use the Writing Feedback Tool when grading this assignment. The Writing Feedback Tool is designed to provide you with guidance and resources to develop your writing based on five core skills. You will find writing feedback in the Scoring Guide for the assignment, once your work has been evaluated.

Competencies Measured

By successfully completing this assignment, you will demonstrate your proficiency in the following course competencies:

- **Competency 1: Analyze and diagnose systems for performance strengths and deficiencies.**
  - Relate the purpose and content of the assignment to the selected organization and performance issue in a brief introduction.
- **Competency 2: Select and apply appropriate interventions to improve learning or performance.**
  - Apply change process to intervention implementation.
- **Competency 3: Apply appropriate evaluation to workplace performance, learning strategies, and interventions.**
  - Describe factors affecting sustainability of changes due to the proposed interventions in your case study.
- **Competency 4: Communicate the value of performance consulting within the field of HPI.**
  - Analyze insights into the case study gained from this assignment.
- **Competency 5: Communicate in a manner that is scholarly, professional, and consistent with expectations for members of the education profession.**
  - Communicate in a manner that is scholarly, professional, and consistent with expectations for members of professional contexts.

u07d1 - Write Your Discussion Post

Peer Review: Intervention Evaluation Plan

Your seventh assignment, Intervention Evaluation Plan, is due next week. For this discussion activity, carefully review the assignment instructions in Week 8 and complete the following:

- Post a complete draft of the assignment so that you can receive feedback from your peers.
- Provide helpful and constructive feedback for two of your peers to help them improve their drafts.

Respond to Your Peers

- After you have posted a complete draft of the assignment to the discussion board, review the drafts of two of your fellow learners and provide constructive feedback that might help them improve their drafts next week before they submit their assignments to be graded.
- Refer to the assignment scoring guide when making your suggestions and cite the grading criteria when appropriate.
- Review the Discussion Participation Scoring Guide to learn how the instructor will evaluate your discussion participation.

Course Resources

SOE Discussion Participation Rubric

u07d2 - Write Your Discussion Post

Intervention Evaluation

After reading Case Study 5.2, "Community Healthcare Association of the Dakotas: A Five-Level Evaluation Model," on pages 577–584 of _Fundamentals of Performance Improvement_, please respond to the following questions:

- Which type of evaluation (formative, summative, confirmative, meta) did the consulting team use in this case study? Identify the type of evaluation and specify how and when they applied it (for example, during the performance analysis phase or intervention design-development phase, or intervention implementation-maintenance phase)?
- Had you been on this consulting team, which evaluation methods or tools from your readings would you have found helpful for this case? Explain why.

Response Guidelines

- Respond to the post of one other learner with clear writing, using proper grammar, spelling, and APA formatting.
- Make sure your responses are substantive; integrate your readings to support key points and analysis.

Read the Discussion Participation Scoring Guide to learn how the instructor will evaluate your discussion participation.

Unit 8 ≫ HPT Value and Benefits

Introduction

HPT Benefits

A performance improvement consultant hired to increase job placement at a technical college presents her conclusions to the college president and other executive leadership. How does she explain the process she just conducted on behalf of the school and the resulting improvements and benefits?

This week, you will wrap up your final project analyses and intervention recommendations by completing the remaining sections of your project: Value of HPT Application for the Organization, the Introduction, and the Conclusion. You will incorporate these sections into your Final Project Template document and submit it for peer review.

To-Do List

- **Discussion:** Submit the first full draft of your final course project, HPT Practice Case Study, for peer review.
- **Discussion:** Participate in the course discussion board.
- **Assignment:** Revise and submit this week's assignment, Intervention Evaluation Plan, for a grade.
- **What You Need to Know:** Read about the role of performance improvement consultants in organizations and the current state of the field.

Learning Activities

u08s1 - Activity Overviews

Assignment Overview

Apply the implementation of an intervention that could impact your selected performance problem when you revise and submit this week's assignment, Intervention Evaluation Plan.

Discussion Overview

Post a complete draft of next week's assignment, HPT Practice Case Study, so that you can receive feedback from your peers. Provide helpful and constructive feedback for two of your peers to help them improve their drafts.

u08s2 - What You Need to Know

The HPT Model

Continue to familiarize yourself with the model's systematic approach and the value it provides organizations that apply it:

- View Week 8 HPT Model.

- View <u>Interview with Dr. Judith Hale</u>, a discussion of HPI and the performance consultant profession. Dr. Hale is a leader in the field and author of one of your course texts, *The Performance Consultant's Fieldbook: Tools and Techniques for Improving Organizations and People.* Watch the following segments:
  - "Why Do HPT?"
  - "The Current State of Human Performance Improvement"

HPT Consultation Benefits

Read further about the value of HPT consultations:

- Hale, J. A. (2007). <u>*The performance consultant's fieldbook: Tools and techniques for improving organizations and people*</u> (2nd ed.). San Francisco, CA: Pfeiffer.
  - Chapter 1, "Performance Consulting," pages 3–31, which covers the role of the performance improvement consultant in organizations and the overall process used to assess performance problems.

Course Resources

<u>Interview with Judith Hale</u> | Transcript

u08a1 - Intervention Evaluation Plan

Overview

This assignment is the seventh in a series of eight assignments that culminates in your final project, the HPT Practice Case Study:

- Week 2: Selected Organization and Performance Problem.
- Week 3: Organizational Analysis.
- Week 4: Environmental Analyses.
- Week 5: Gap and Cause Analyses.
- Week 6: Intervention Selection.
- Week 7: Intervention Implementation/Change Plan.
- *Week 8: Intervention Evaluation Plan.*
- Week 9: HPT Practice Case Study.

Note: For each assignment, you will add new content to the Final Project Template that you began using at the beginning of the course. The final course project uses a practice case study approach, so the individual assignment components do not require actual performance consultation or data gathering within the identified organization.

Instructions

First **choose one intervention** from the Intervention Priority Chart you completed in the Intervention Selection assignment. Then complete the following worksheet:

- <u>Planning the Evaluation of a Performance Improvement Intervention [DOCX]</u>.

Then complete the following in the "Intervention Evaluation" section of the Final Project Template:

- **Relate the purpose and content of the assignment to the selected organization and performance issue in a brief introduction.**
  - Apply the HPT model as a conceptual framework.
  - Include a logical transition from your preceding assignment to this section.

- **Detail appropriate strategy for evaluating intervention impact.**
  - Justify the selected evaluation strategy.

- **Apply evaluation methods to specify measures and to address results.**
  - Provide relevant examples.

- **Analyze insights into the case study gained from this assignment.**
  - Identify specific factors that may be contributing to the problem identified in the study.

- **Communicate in a manner that is scholarly, professional, and consistent with expectations for members of professional contexts.**
  - Integrate course readings to support HPI-related points and to strengthen the narrative.
  - Use your judgment or consult with your instructor to make appropriate revisions based on feedback that you have received.

◦ Update the table of contents and reference page each time you add new content to the Final Project Template.

Additional Requirements

In addition to the requirements outlined above, your assignment should meet the following:

- **Written communication:** Written communication should be scholarly, professional, and consistent with expectations for members of professional contexts.
- **APA format:** Follow current APA guidelines for style and format, including a cover page, headings, and a hanging indent for all citation entries. See the Capella Writing Center for more information about APA.
- **References:** Follow applicable instructions in the Final Project Template.
- **Length:** Follow applicable instructions in the Final Project Template.
- **Font and font size:** Times New Roman, 12 points.

Note: Your instructor may use the Writing Feedback Tool when grading this assignment. The Writing Feedback Tool is designed to provide you with guidance and resources to develop your writing based on five core skills. You will find writing feedback in the Scoring Guide for the assignment, once your work has been evaluated.

Competencies Measured

By successfully completing this assignment, you will demonstrate your proficiency in the following course competencies:

- **Competency 1: Analyze and diagnose systems for performance strengths and deficiencies.**
  ◦ Relate the purpose and content of the assignment to the selected organization and performance issue in a brief introduction.

- **Competency 3: Apply appropriate evaluation to workplace performance, learning strategies, and interventions.**
  ◦ Detail appropriate strategy for assessing intervention impact.
  ◦ Apply evaluation methods to specify measures and to address results.

- **Competency 4: Communicate the value of performance consulting within the field of HPI.**
  ◦ Analyze insights into the case study gained from this assignment.

- **Competency 5: Communicate in a manner that is scholarly, professional, and consistent with expectations for members of the education profession.**
  ◦ Communicate in a manner that is scholarly, professional, and consistent with expectations for members of professional contexts.

u08d1 - Write Your Discussion Post

Peer Review: HPT Practice Case Study

Your final project, HPT Practice Case Study, is due next week. For this discussion activity, carefully review the assignment instructions in Week 9 and complete the following:

- Post a complete draft of the assignment so that you can receive feedback from your peers.
- Provide helpful and constructive feedback for two of your peers to help them improve their drafts.

Respond to Your Peers

- After you have posted a complete draft of the assignment to the discussion board, review the drafts of two of your fellow learners and provide constructive feedback that might help them improve their drafts next week before they submit their assignments to be graded.
- Refer to the assignment scoring guide when making your suggestions and cite the grading criteria when appropriate.
- Review the Discussion Participation Scoring Guide to learn how the instructor will evaluate your discussion participation.

Course Resources

SOE Discussion Participation Rubric

Unit 9 ≫ HPT Practice Case Study

Introduction

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Reflection

Now that your course project is complete, you will have time this week to consider how much you have learned in a few short weeks. Which aspects of HPI and the HPT Model strike you as most memorable, important, or applicable to your own professional goals?

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This week, you will reflect on what you have learned in the course. Since the practice case study involves many different tools and perspectives, it can be difficult to remember where you started in this course and how each week provided new insights and learning opportunities. While this course skimmed quickly through the HPT model, in your next courses you will look at specific phases of the model in more depth.

To-Do List

- **Discussion:** Participate in the course discussion board.
- **Assignment:** Revise and submit your final course project, HPT Case Study, for a grade.
- **What You Need to Know:** Review fundamental elements of the HPT Model.
- **Plan:** Confirm that you saved course documents to your ePortfolio.

Learning Activities

u09s1 - Activity Overviews

Assignment Overview

Finish your course project when you revise and submit this week's assignment, HPT Practice Case Study. Remember to submit the finished product to your ePortfolio.

Discussion Overview

Discuss key course concepts with your fellow learners.

u09s2 - What You Need to Know

The HPT Model

As you reflect on your progress throughout this course, consider what you have learned.

- Review the Week 8 HPT Model to review the systematic approach and major phases of the human performance technology model. Consider the relationships between the model's various components.

Human Performance Improvement

Review this Capella Library resource as you review your progress throughout the course:

- Pershing, J. (Ed.). (2006). *Handbook of human performance technology: Principles, practices, and potential* (3rd ed.). San Francisco, CA: Pfeiffer.
  - Chapter 1, "Human Performance Technology Fundamentals," pages 5–34.

u09a1 - HPT Practice Case Study

Overview

This assignment, the HPT Practice Case Study, is the final project. All the other assignments you have completed in the course contribute to this final project:

- Week 2: Selected Organization and Performance Problem.
- Week 3: Organizational Analysis.
- Week 4: Environmental Analyses.
- Week 5: Gap and Cause Analyses.
- Week 6: Intervention Selection.
- Week 7: Intervention Implementation/Change Plan.
- Week 8: Intervention Evaluation Plan.
- *Week 9: HPT Practice Case Study.*

Note: To finish your course project, you will complete all sections of the Final Project Template that you began working on at the beginning of the course. The final course project uses a practice case study approach, so the individual assignment components do not require actual performance consultation or data gathering within the identified organization.

- This final draft should reflect any revisions and modifications made to all assignments completed during the course.
- Ensure that you have completed and finalized all of the necessary sections of the paper.

Instructions

To complete your Final Project Template, you will finalize the following sections: Value of HPT Application for the Organization, the Introduction, and the Conclusion. Your completed Final Project Template should accomplish all of the following:

- **Analyze workplace, process, and performer factors affecting specific performance results in the organization.**
  - Assess relevant strengths and deficiencies that might cause a performance problem.

- **Analyze performance gaps based on expected results.**
  - Identify the underlying factors affecting performance.

- **Articulate appropriate interventions to close performance gaps.**
  - Provide rationale based on gaps and causes of a problem.

- **Articulate change plan that allows organization to sustain expected improvements.**
  - Provide rationale based on HPI concepts

- **Apply evaluation methods to specify measures and to address results.**
  - Provide justification for selected evaluation strategy

- **Articulate the value that HPT can offer the organization.**
  - Provide relevant examples of potential benefits applicable to the case study.

- **Communicate in a manner that is scholarly, professional, and consistent with expectations for members of professional contexts.**
  - Integrate course readings to support HPI-related points and to strengthen the narrative.
  - Use your judgment or consult with your instructor to make appropriate revisions based on feedback that you have received.
  - Update the table of contents and reference page after you have added new content.

Additional Requirements

In addition to the requirements outlined above, your assignment should meet the following:

- **Written communication:** Written communication should be scholarly, professional, and consistent with expectations for members of professional contexts.
- **APA format:** Follow current APA guidelines for style and format, including a cover page, headings, and a hanging indent for all citation entries. See the Capella Writing Center for more information about APA.
- **References:** Follow applicable instructions in the Final Project Template.
- **Length:** Follow applicable instructions in the Final Project Template.
- **Font and font size:** Times New Roman, 12 points.

Note: Your instructor may use the Writing Feedback Tool when grading this assignment. The Writing Feedback Tool is designed to provide you with guidance and resources to develop your writing based on five core skills. You will find writing feedback in the Scoring Guide for the assignment, once your work has been evaluated.

Competencies Measured

By successfully completing this assignment, you will demonstrate your proficiency in the following course competencies:

- **Competency 1: Analyze and diagnose systems for performance strengths and deficiencies.**
    ◦ Analyze workplace, process, and performer factors affecting specific performance results in the organization.
    ◦ Analyze performance gaps and causes of a problem based on expected results.

- **Competency 2: Select and apply appropriate interventions to improve learning or performance.**
    ◦ Articulate appropriate interventions to close performance gaps.
    ◦ Articulate change plan that allows organization to sustain expected improvements.

- **Competency 3: Apply appropriate evaluation to workplace performance, learning strategies, and interventions.**
    ◦ Apply evaluation methods to track measures and to address results.

- **Competency 4: Communicate the value of performance consulting within the field of HPI.**
    ◦ Articulate the value that HPT can offer the organization.

- **Competency 5: Communicate in a manner that is scholarly, professional, and consistent with expectations for members of the education profession.**
    ◦ Communicate in a manner that is scholarly, professional, and consistent with expectations for members of professional contexts.

u09d1 - Write Your Discussion Post

Key Learning

Look back at Weeks 1–8 and summarize one or two key concepts that you learned each week. Your summary may be about HPI contributors, processes, tools, or any other new things you have learned.

After you complete your summary, explain how you plan to use this learning professionally or through your work in the T&PI program.

Response Guidelines

- Respond to the post of one other learner with clear writing, using proper grammar, spelling, and APA formatting.
- Make sure your responses are substantive; integrate your readings to support key points and observations.

Read the Discussion Participation Scoring Guide to learn how the instructor will evaluate your discussion participation.

Course Resources

SOE Discussion Participation Rubric

u09d2 - Write Your Discussion Post

ePortfolio Confirmation

For this discussion activity, post a confirmation of having saved your final project paper to your ePortfolio.

Also, keep in mind that Capella learners in the Master's program have the opportunity to apply for the Certified Performance Technologist (CPT) offering from the International Society of Performance Improvement. The capstone course, ED5994, requires that you submit via ePortfolio portions of the CPT application and evidence that you have appropriate artifacts to demonstrate completion of the standards. You will use the ePortfolio as a repository for your artifacts and, throughout the ten weeks of the course, upload a wide variety of work samples to create a full repertoire of your accomplishments.

Archive all T&PI coursework in your ePortfolio to be prepared for the **ED5994 Capstone Course.**

It is important that you add files to your ePortfolio as you progress through your program, as you will eventually lose access to your courses and the files in them. If you have not done so already, paste the link to your ePortfolio in the **WRITE SUBMISSION** text box in the assignment submission area.

See the Tools and Resources area for more information about ePortfolio.

Course Resources

Unit 10 ≫ Organizational Improvement

 Introduction

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Ongoing Professionalization

Now that you have carefully studied and practiced the process and principles of HPI and the HPT Model, now is a good time to consider how you will apply them in your ongoing professional life. Which organizations, associations, and other professional development opportunities will best help you succeed in meeting your goals?

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This final week of the course, you will take a close look at the International Society for Performance Improvement (ISPI) and the Association for Talent Development (ATD) professional standards and core competencies. You will have an opportunity to self-assess against these skill sets and to create your own development plan. Additionally, you will learn about specific ways to build professional credibility and influence in your organization and how to articulate the value of using HPT in your organization. You will also consider the major factors that must be in place to transition an organization to an HPI approach for addressing performance gaps.

To-Do List

- **Discussion:** Participate in the course discussion board.
- **What You Need to Know:** Read about professional development opportunities.

Learning Activities

u10s1 - Activity Overviews

Discussion Overview

Discuss with your fellow learners how you can apply professional performance improvement standards in your career.

u10s2 - What You Need to Know

The HPT Model

Review the overall functions of the comprehensive HPT Model:

- Review the Week 8 HPT Model.

Professional Development

In this final week of the course, review the standards, credibility, and application of HPI in professional contexts:

- Van Tiem, D. M., Moseley, J. L., & Dessinger, J. C. (2012). _Fundamentals of performance improvement: Optimizing results through people, process, and organizations_ (3rd ed.). San Francisco, CA: Pfeiffer.
    - Review Appendix A, "ISPI's Performance Technology Standards," pages 587–612. This reading will explain more about the ISPI professional standards and help you to consider your own development plan, which you will post in this week's discussion forum.

- Hale, J. (2007). _The performance consultant's fieldbook: Tools and techniques for improving organizations and people_ (2nd ed.). San Francisco, CA: Pfeiffer.

- Read Chapter 4, "Credibility and Influence," pages 79–101. This chapter discusses ways to develop key HPI competencies and to establish credibility in the organization as an HPI professional.
- Rothwell, W. J., Hohne, C. K., & King. S. B. (2018). *Human performance improvement: Building practitioner performance* (3rd ed.). New York, NY: Routledge.
  - Read Chapter 7, "Transforming the Training Department into an HPI Function," pages 158–172. This chapter will help you consider how to employ HPI on the job.

Internet Resources

- View the International Society for Performance Improvement (ISPI) website, and search the site for the organization's complete list of standards. These standards provide a clear set of expectations for HPI professionals.
- Similarly, view the Association for Talent Development (ATD) website. The ATD identifies core competencies for training and performance improvement professionals. See the list of these competencies in *Human Performance Improvement* on pages 19–34. You will note similar skill sets running through both lists.

ISPI Capella Virtual Chapter Membership

Capella University offers free membership to the virtual chapter of International Society for Performance Improvement (ISPI) for all T&PI learners. ISPI's mission is to develop and recognize the proficiency of its members and advocate the use of human performance technology. Additionally Capella learners receive a discount for certification through ISPI and can often use course projects as possible fulfillment toward some of the standards.

ISPI's programs provide excellent resources for coursework you are already doing toward your degree completion. Programs include CPT certification, publishing your course work, networking by industry, e-mentoring, and even an HPT project bank with real work for real organizations.

- Visit the ISPI Capella Virtual Chapter to access your free membership and investigate the resources available to you.

u10d1 - Write Your Discussion Post

Self-Evaluation

The readings from this week have provided you with rich resources for helping to identify your strengths and needs for necessary HPI skill development. Please respond to the following:

- Using the ISPI and ATD lists of standards and competencies, which of these would you identify as strengths and which do you feel might be areas for improvement?
- After prioritizing the development needs, what specific ways would you identify for developing the top two priorities?

Response Guidelines

- Respond to the post of one other learner with clear writing, using proper grammar, spelling, and APA formatting.
- Make sure your responses are substantive; integrate your readings to support key points and observations.

Read the Discussion Participation Scoring Guide to learn how the instructor will evaluate your discussion participation.

Course Resources

SOE Discussion Participation Rubric

u10d2 - Write Your Discussion Post

Transition Plan

Review the readings from this week and respond to the following:

- Describe how you plan to apply HPI/HPT concepts in your professional life.

- Describe steps your organization might take to begin transitioning to an HPT approach for closing performance gaps.

Response Guidelines

- Respond to the post of one other learner with clear writing, using proper grammar, spelling, and APA formatting.
- Make sure your responses are substantive; integrate your readings to support key points and observations.

Read the Discussion Participation Scoring Guide to learn how the instructor will evaluate your discussion participation.

Course Resources

SOE Discussion Participation Rubric