Syllabus

Course Overview

This course focuses on designing effective solutions to resolve performance problems in organizations. Determining appropriate performance solutions is a systemic and systematic process. Faced with many options, how does the performance consultant make the best choice?

In this course, you will identify a performance problem from your current workplace or other professional experience for a comprehensive exploration of many kinds of performance-improvement interventions including training, incentives information, feedback, resources, personnel selection, organizational structure, and process improvement. From this research you will create a change-management plan, a project-management plan, and an evaluation plan to ensure the interventions will function as desired. Your final project deliverable will be a solution proposal for key decision makers and stakeholders in your organization.

The tools and techniques you develop in this course are directly applicable to a wide variety of performance problems you might encounter as a performance consultant.

ePortfolio

Your program of study requires the use of an electronic portfolio in which you will save assignments and other artifacts to demonstrate competency in the outcomes of this course and in your program overall. Your ePortfolio will travel with you from course to course, and you can update it anytime.

Updating your ePortfolio throughout your program is critical to the completion of your degree; a portfolio assessment with your instructor will be an important part of your capstone course. Review the assignments and other course activities to identify those that demonstrate your program outcomes and add them to your ePortfolio while you have access to this course. It is in your best interest to 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.

Remember: the content and layout of your ePortfolio is up to you. Refer to the Campus ePortfolio resource for complete information regarding the use and management of your ePortfolio.

Course Competencies **(Read Only)**

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

1. Analyze systems for performance strengths and deficiencies.
2. Select appropriate interventions to improve learning or performance.
3. Evaluate workplace performance, learning strategies, and interventions.
4. Communicate clearly and effectively with stakeholders during the design process.

Course Prerequisites

There are no prerequisites for this course.

Syllabus ›› Course Materials

Required

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

Integrated Materials

Once the Capella University Bookstore opens for the quarter, as a registered learner you will receive an e-mail containing a direct link you can use to obtain your materials. Please follow the instructions provided to you by the bookstore to download digital materials. Some materials are available only in hard-copy format and will be shipped to you. The bookstore will indicate any materials that may involve shipping.

Book

Gilbert, T. F. (2007). *Human competence: Engineering worthy performance* (tribute edition). San Francisco, CA: Pfeiffer. ISBN: 9780787996154.

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.

- Binder, C. (1998) The Six Boxes : A descendant of Gilbert's Behavior Engineering Model. *Performance Improvement Journal*, *37*(6), 48–52.
- Cicerone, B., Sassaman, R., & Swinney, J. (2005). The path to improved performance starts with theory: A lesson learned from Tom Gilbert. *Performance Improvement, 44*(2), 9–14.
- Lewis, J., & Van Tiem, D. (2004). Appreciative inquiry: A view of a glass half full. *Performance Improvement, 43*(8), 19–24.
- Marrelli, A. F. (2005). The performance technologist's toolbox: Process mapping. *Performance Improvement*, *44*(5), 40–44.
- Norberg, P. A. (2017). Employee incentive programs: Recipient behaviors in points, cash, and gift card programs. *Performance Improvement Quarterly*, *29*(4), 375–388.
- Olafsen, A. H., Halvari, H., Forest, J., & Deci, E. L. (2015). Show them the money? The role of pay, managerial need support, and justice in a self-determination theory model of intrinsic work motivation. *Scandinavian Journal of Psychology*, *56*(4), 447–457.
- Pershing, J. A. (Ed.). (2006). *Handbook of human performance technology: Principles, practices, and potential* (3rd ed.). San Francisco, CA: Pfeiffer.
- Skillsoft. (n.d.). *Giving feedback* [Tutorial].
- Skillsoft. (n.d.). *Organizational behavior: Dynamics of a positive organizational culture* [Tutorial].
- 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.

- Bellenger, G. (2004). Systems thinking: Root cause analysis. Retrieved from http://www.systems-thinking.org/rca/rootca.htm
- Dooley, J. (1999). Problem-solving as a double-loop learning system [PDF]. Retrieved from http://www.well.com/user/dooley/Problem-solving.pdf
- Fast Company. (2004, December 16). Creating a learning-driven culture [Blog post]. Retrieved from http://www.fastcompany.com/blog/fast-company-staff/fast-company-blog/creating-learning-driven-culture
- Free Management Library. (2019). Systems thinking, systems tools and chaos theory. Retrieved from https://www.managementhelp.org/systems/index.htm
- George Washington University. (n.d.). The history and development of cybernetics [PPT]. Retrieved from http://www.gwu.edu/~asc/slideshow/HistoryCybernetics_English.ppt
- Infed. (n.d.). Chris Argyris: Theories of action, double-loop learning and organizational learning. Retrieved from http://www.infed.org/thinkers/argyris.htm
- International Society for Performance Improvement (ISPI). (n.d.). International Society for Performance Improvement code of ethics. Retrieved from http://www.ispi.org/ISPI/Credentials/ISPI_Code_of_Ethics.aspx
- IntraHealth International, Inc. (n.d.). Performance improvement: Stages, steps and tools. Retrieved from http://www.intrahealth.org/sst/index.html
- IntraHealth International, Inc. (n.d.). Stage 7: Select and design interventions. Retrieved from https://www.intrahealth.org/sst/stage7.html
- IntraHealth International. (n.d.). Stage 8: Implement interventions. Retrieved from https://www.intrahealth.org/sst/stage8.html
- IntraHealth International. (n.d.). Step 1: Propose and select interventions. Retrieved from https://www.intrahealth.org/sst/step7-1.html
- Learning Theories. (n.d.). Retrieved from https://www.learning-theories.com/
- McNamara, C. (n.d.). Thinking about organizations as systems. Retrieved from http://managementhelp.org/organizations/systems.htm

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.

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.

- Iowa State University Facilities Planning and Management. (n.d.). Process mapping: What is process mapping? Retrieved from http://www.fpm.iastate.edu/worldclass/process_mapping.asp
- Kirkpatrick Partners. (n.d.). The Kirkpatrick model. Retrieved from http://www.kirkpatrickpartners.com/Our-Philosophy/The-Kirkpatrick-Model
- ROI Institute. (n.d.). Retrieved from http://www.roiinstitute.net/
- The Thiagi Group. (n.d.) Retrieved from http://www.thiagi.com/

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.

Library

The following optional readings may be available in the Capella University Library. 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. If the full text is not available, you may be able to request a copy through the Interlibrary Loan service.

- Baumeister, R. F., & Alghamdi, N. (2015). Resource-based interventions in the workplace: Integration, commentary, and recommendations. *Journal of Occupational & Organizational Psychology*, *88*(3), 623–629.
- Bernardez, M. L. (2009). Surviving performance improvement "solutions": Aligning performance improvement interventions. *Performance Improvement Quarterly*, *22*(2), 111–127.
- Cerasoli, C. P., Nicklin, J. M., & Ford, M. T. (2014). Intrinsic motivation and extrinsic incentives jointly predict performance: A 40-year meta-analysis. *Psychological Bulletin*, *140*(4), 980–1008.
- Chevalier, R. (2003). Updating the Behavior Engineering Model. *Performance Improvement*, *42*(5), 8–14.

- Crossman, D. C., (2010). Gilbert's Behavior Engineering Model: Contemporary support for an established theory. *Performance Improvement Quarterly*, *23*(1), 31.
- Jones, R. J., Woods, S. A., & Guillaume, Y. R. F. (2016). The effectiveness of workplace coaching: A meta-analysis of learning and performance outcomes from coaching. *Journal of Occupational & Organizational Psychology*, *89*(2), 249–277.
- Long, H. (2015). Intervention selection: An examination of evidence and changes in belief during the decision-making process. *Performance Improvement Quarterly, 28*(2), 27.
- Nel, B. (2013). *Performance in a box: Performance improvement toolbox for human resources.* Randburg, South Africa: Knowres.
- Phillips, J., & Phillips, P. (2006). Return on investment measures success. *Industrial Management*, *48*(2), 18–23.
- Rampersad, H. (2006). Self-examination as the road to sustaining employee engagement and personal happiness. *Performance Improvement*, *45*(8), 18–25.
- Ripley, D. E. (2016). Joe Harless, Ed.D.: An ounce of analysis. *Performance Improvement*, *55*(6), 41–48.
- Stiffler, M. A. (2006). Incentive compensation management: Making pay for performance a reality. *Performance Improvement, 45*(1), 25–30.
- Tosti, D. T., & Amarant, J. (2005). Energy investment beyond competence. *Performance Improvement*, *44*(1), 17–22.
- Tosti, D. T., & Jackson, S. D. (1997). The organizational scan. *Performance Improvement, 36*(10), 22–26.
- Turaga, R. (2017). The art of giving feedback. *IUP Journal of Soft Skills*, *11*(2), 53–61.

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.

- American Evaluation Association (AEA). (n.d.). Retrieved from http://www.eval.org/
- American Management Association (AMA). (n.d.). Change management workshop. Retrieved from http://www.amanet.org/training/seminars/onsite/Change-Management-Workshop.aspx
- Association for Talent Development. (n.d.). Retrieved from http://www.astd.org/
- Ganttchart.com. (n.d.) Example Gantt charts created with scheduling software. Retrieved from http://www.ganttchart.com/Examples.html
- International Society for Performance Improvement (ISPI). (n.d.). Retrieved from https://www.ispi.org/
- Smartdraw. (n.d.). How to create a Gantt chart with SmartDraw. Retrieved from https://www.smartdraw.com/gantt-chart/how-to-create-a-gantt-chart.htm

Projects

Project ›› Intervention Solution Proposal

Project Overview

For your final project, you will select a performance improvement project, preferably from your workplace or professional experience. The project must involve a performance gap that can be defined in terms of accomplishments (value in terms of money, energy, time invested in behavior) rather than behavior (work, motivation, or knowledge). The performance gap must:

- Influence the accomplishment of the organization’s goals.
- Not have a predetermined solution.

Note: If you have completed ED7631 or ED7641, you may continue with the same project or choose a different one. If this is your first course in Human Performance Technology (HPT), you must identify the performance gap as well as the cause of the gap.

Your solution proposal is a pitch to stakeholders and leadership in your organization to allocate resources to implement your recommendations, so they must be confident that you have carefully thought through all aspects of the performance problem, are presenting the best solution, and will execute this project with care and attention to detail.

Try to select a performance gap that is clearly linked to overall organizational goals. It is critical that you define the gap precisely to choose the proper solution. Pose critical questions such as:

- Whose performance is at issue?
- What is the desired performance—defined as *accomplishments*?
- How do you measure the performance to quantify the gap between the current and the desired performance?

If we cannot articulate the performance gap we are trying to close, we risk solving for the wrong problem. Mager (1997) cautions, "...if you're not sure where you're going, you are liable to end up someplace else—and not even know it" (p. vi). The Performance Improvement: Stages, Steps and Tools website will provide some guidance and tools for conducting the root-cause analysis. You may also refer to the *Handbook of Human Performance Technology*.

There are four components related to the final course project. Use the templates provided in the unit resources for each assignment.

Unit 2—Statement of the Problem. For this assignment, you will:

1. Select a performance improvement problem. *Note:* Throughout this project you should collaborate with the key stakeholders who are ultimately responsible for implementing the project.
2. Use the Statement of Problem template to complete this assignment.
3. Make an initial analysis of the situation. Discuss how the organization is losing profit, productivity, quality, and so on, as a result of this performance problem.
4. Post a draft of your Statement of the Problem in the Unit 2 discussion for peer feedback.
5. Revise your draft based on the feedback received from your peers and submit your assignment.

Unit 7—Non-Training Intervention. For this assignment, you will:

1. Select one of the non-training interventions you wrote about in Units 3 through 6.
2. Use the Non-Training Intervention template to complete this assignment.
3. Post a draft of your Non-Training Intervention in the Unit 7 discussion for peer feedback.
4. Use the feedback you receive from your peers and instructor to expand on the description and design of the intervention. Provide a full idea of how the intervention will be constructed.
5. Revise your work and submit in the assignment area.

Unit 8—Knowledge and Skills Intervention. For this assignment, you will:

1. Identify a training intervention to address a root cause of the performance problem or that would support the non-training intervention you identified in the Unit 8 assignment.
    - For instance, while your performance problem may not have a root cause in lack of knowledge and skill, you could create a training program that would support the non-training intervention in the Unit 7 assignment. In that assignment, you might have created a new process for handling paperwork in a department. Workers will probably need training in how to carry out the new process, so you could create a training program that helps workers use the new paperwork process.
2. Use the Knowledge and Skills Intervention template to complete this assignment.
3. Post a draft of your Knowledge and Skills Intervention in the Unit 8 discussion for peer feedback.
4. Incorporate the desired peer feedback. Revise your work and submit in the assignment area.

Unit 9—Implementation and Evaluation Plan. For this assignment, you will:

1. Draft the change-management, project-management, and evaluation plans for your Performance Improvement Project.
    - Follow Dormant's "Suggestions to Minimize Resistance" for your change-management plan (Van Tiem, Moseley, & Dessinger, 2012, p.70).
    - Follow Andreadis's "Project Life Cycle Processes" (Pershing, 2006, p. 946) for your project-management plan.
2. Use the Implementation and Evaluation Plan template to complete this assignment.
3. Include these elements:
    - **Evaluation Plan.** Identify how you propose to collect evaluation data for the five levels of the Phillips ROI model:
        - Reaction.
        - Learning.
        - Application.
        - Business impact.
        - Return on investment (You are not expected to do a full ROI analysis in this course. Indicate some of the costs of your interventions and some of the financial and nonfinancial benefits. You will learn more about doing a formal ROI analysis in ED7675).
    - **Change-Management Plan.** Describe how you will carry out your change-management plan, using Dormant's ideas or another change-management model.
    - **Implementation Plan.** Create a Gantt chart, showing the various steps in your project and the deadlines for each step.
4. Post a draft of your Implementation and Evaluation Plan in the Unit 9 discussion for peer feedback.
5. Incorporate the desired peer feedback. Revise your work and submit in the assignment area.

Instructions

Unit 10—Intervention Solution Proposal.

The purpose of your solution proposal is to garner support for your recommendations from stakeholders and organizational leadership. Because you are asking them to allocate resources to implement your recommendations, they must be convinced that you have considered all aspects of the performance problem carefully and are recommending the best solution. They must also be confident that you will execute this project with care and attention to detail. To do this successfully:

- Direct your proposal to the stakeholders who approve your plan.
- Include enough background information and explanation to create a complete picture for other executives who may need to approve the plan and its associated expenditures.

Like the other assignments in this course, a template is provided to help you structure your final proposal. You will find it in the Unit 10 Resources. There is also a sample final project paper to serve as a model for your project.

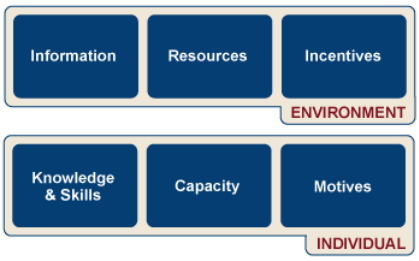
Following are requirements for the following sections included in your Proposed Performance Solution:

- **Executive Summary.** The executive summary is a snapshot of the entire proposal designed as a persuasive, stand-alone document. Include a very brief statement of the performance gap, its significance, root causes, and your proposed solution. It should be no more than one page and end with a recommendation. Because it may be the only page that the senior executives in an organization will read, it must provide a complete yet clear and concise picture of your recommendations.
- **Statement of the Problem.** Make sure that everyone reading the proposal understands the nature and significance of the performance gap you are trying to resolve. Include the name of the organization, the organizational background and context, the performance gap, the significance of the problem, the root causes, and the key stakeholders.
- **Proposed Solution.** Describe clearly the interventions you are recommending to resolve the performance problem. Include in your list of proposed interventions a description of each intervention, a summary of the proposed solutions, a rationale for each intervention selected, and a completed Intervention Selection Worksheet.
- **Implementation Plan**. Present a detailed plan for the successful adoption of the interventions with viable design, development, and implementation strategies for the proposed interventions. Include a change-management plan and a project-management plan.

Before submitting your final proposal, you will need to incorporate the feedback you receive from your instructor and peers.

Additional Requirements

- **Written communication:** Written communication is free of spelling, grammar, and punctuation errors that detract from the overall message.
- **APA formatting:** Resources and citations are formatted according to current edition APA style and format.
    - Exception: because you may submit this proposal to your organization, you may deviate from APA style for formatting that is more common in business communications. Any deviations from APA format must be done to enhance clarity and readability of the proposal. We will refer to this as "business style." You may:
        - Choose to single space rather than double space the body paragraphs.
        - Use numbered and bulleted lists.
        - Use bold type where appropriate.
        - Insert tables and figures in the appropriate positions in the body of the paper.
- **Number of resources**: There is no minimum number of resources.
- **Length of paper:** No minimum length of paper.
- **Font and font size**: Arial, 10 points.
- **Portfolio prompt**: You are required to save this learning activity to your ePortfolio.



In Unit 1, we will discuss how this course fits into the context of the human performance technology (HPT) model. You will also learn about the requirements for the performance-improvement project. Finally, you will be introduced (or reintroduced) to Thomas Gilbert, one of the founding leaders in the performance-improvement field.

Where Are We in the HPT Model?

Look at the HPT model in Chapter 1 of *Performance Improvement Interventions,* which is the same model that you will find in the other texts and at www.ispi.org. This course encompasses the Intervention Selection and Design and Intervention Implementation and Change boxes and half of the Cause Analysis box. Other courses in the Training and Performance Improvement specialization address the earlier boxes in this model. ED7631, Introduction to Training and Performance Systems, provides an overview of the entire model. ED7641, Needs Assessment: Models and Procedures, addresses the Cause Analysis box of the HPT model. If you have not completed these courses, you will need to quickly become familiar with at least the basic concepts of these earlier phases in the model by reviewing materials in the textbooks at www.ispi.org or at the Performance Improvement: Stages, Steps and Tools website.

Thomas Gilbert

If you are not familiar with Thomas Gilbert, you will know him well by the end of this course. As a founder of the performance-improvement field, he expanded the vision beyond training to consider other factors that affect performance improvement. His text, *Human Competence: Engineering Worthy Performance*, was first published in 1978 and is considered a classic in the field. In this unit, you will learn about Gilbert's Behavioral Engineering Model (BEM) and his related PROBE model. You will learn how these models can be used to diagnose performance problems, plan solutions, and set priorities.

If you compare the unit titles in this course to Gilbert's BEM, you will discover that Units 3–6 each address one of the cells in this model and Unit 7 addresses the last two cells together. This model is elegant in its simplicity and easy to explain to clients. Learn this model inside and out and add it to your performance consultant's tool kit.

Project Selection

The focus of this course is designing solutions to resolve performance gaps. The course project is structured as a proposal that can be presented to leadership at your workplace. As a performance improvement consultant, you should collaborate with key stakeholders to formulate this proposal. The proposal should be written so that you or these stakeholders can present your proposal to leadership for endorsement and funding.

You will be required to complete the following assignments due at the end of these units:

- Unit 2: Statement of the Problem.
- Unit 7: Non-Training Intervention.
- Unit 8: Knowledge and Skills Intervention.
- Unit 9: Implementation and Evaluation Plan.
- Unit 10: Intervention Solution Proposal.

References

Gilbert, T. F. (2013). *Human competence: Engineering worthy performance* (tribute ed.). San Francisco, CA: Pfeiffer.

Mager, R. (1997). *Preparing instructional objectives* (3rd ed.). Atlanta, GA: Center for Effective Performance.

Pershing, J. A. (2006). *Handbook of human performance technology: Principles, practices, and potential* (3rd ed.). San Francisco, CA: Pfeiffer.

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.

Learning Activities

u01s1 - Studies

Readings

Use your *Fundamentals of Performance Improvement: Optimizing Results Through People, Process, and Organizations* text to read the following:

- Chapter 1, "Overview of Performance Improvement," pages 3–40.
- Chapter 2, " Performance Improvement Model," pages 41–60.
- Chapter 3, "Change Management," pages 61–80.
- Appendix A, "ISPI's Performance Technology Standards," pages 587–612.
- Appendix B, "Certified School Improvement Specialist Standards," pages 613–622.

Use your *Human Competence: Engineering Worthy Performance* text to read the following:

- Chapter 1, "A Leisurely Look at Worthy Performance," pages 13–28.
- Chapter 2, "Measuring Human Competence," pages 43–53 and 59–72.
- Appendix, "An Application of Performance Engineering," page 347.

Multimedia

- View Welcome to Designing Training and Performance Solutions for an overview of this course.
- Complete Gilbert's Behavioral Engineering Model Quiz 1 to check your understanding of Gilbert's Behavioral Engineering Model (BEM). The quiz is not graded, but your understanding of the model is important. You will have an opportunity to retest your knowledge of Gilbert's BEM in Unit 7.
- Complete Gilbert's Behavioral Engineering Model (BEM).
- View Gilbert's First Leisurely Theorem.
- Complete W = A/B Theorem to learn more about the value of performance based on Gilbert's First Leisurely Theorem.

Optional Internet

The following professional associations provide support and resources for project management and performance-improvement solutions:

- American Evaluation Association (AEA). (n.d.). Retrieved from http://www.eval.org/
- American Management Association (AMA). (n.d.). Change management workshop. Retrieved from http://www.amanet.org/training/seminars/onsite/Change-Management-Workshop.aspx
- Association for Talent Development. (n.d.). Retrieved from http://www.astd.org
- International Society for Performance Improvement (ISPI). (n.d.). Retrieved from https://www.ispi.org/

Optional Readings

Use the Capella University Library to read the following:

- Binder, C. (1998). The Six Boxes : A descendent of Gilbert's Behavior Engineering Model. *Performance Improvement Journal, 37*(6), 48–52.
- Chevalier, R. (2003). Updating the Behavior Engineering Model. *Performance Improvement, 42*(5), 8–14.
  - Gilbert's BEM and PROBE models are covered in this article.
- Crossman, D. C., (2010). Gilbert's Behavior Engineering Model: Contemporary support for an established theory. *Performance Improvement Quarterly, 23*(1), 31.
  - The author illustrates how Gilbert's performance tools are adaptable to any workplace.
- Ripley, D. E. (2016). Joe Harless, Ed.D.: An ounce of analysis. *Performance Improvement, 55*(6), 41–48.
  - This article discusses Harless's Performance Improvement Process and its emphasis on a rigorous, systematic approach.

For Learners New to HPT and Needs Analysis

If this is your first course in human performance technology (HPT), this course requires that you identify a performance gap as well as the cause of the gap. Use the Internet to complete the following:

- Bellenger, G. (2004). Systems Thinking - Root Cause Analysis. Retrieved from www.systems-thinking.org/rca/rootca.htm
  - This website will you help define the performance gap and identify root causes for your performance-improvement project.
- IntraHealth International, Inc. (n.d.). Performance improvement: Stages, steps and tools. Retrieved from www.intrahealth.org/sst/index.html
  - This website will provide some guidance and tools for making a root-cause analysis.

For additional core content on performance gaps and needs analysis, use the *Handbook of Human Performance Technology* text to read the following:

- "Part One: Foundations of Human Performance Technology," pages 1–188.

u01s2 - Project Preparation: Intervention Solution Proposal

In the next unit, you will identify a performance improvement project at your current workplace or other professional experience and develop an Intervention Solution Proposal to present to stakeholders. You should start thinking about this selection now.

- *If you have completed ED7631 or ED7641*, you may continue with the same project or you may choose a different one.
- *If this is your first course in human performance technology (HPT)*, you must identify the performance gap as well as the cause of the gap. The Performance Improvement Stages, Steps and Tools website will provide some guidance and tools for doing a root-cause analysis. You may also refer to related chapters in the *Handbook of Human Performance Technology*.

The initial units in this course provide an opportunity for you to explore performance problems and intervention possibilities.

- Try to choose a performance gap that is clearly linked to overall organizational goals. It is critical that you have a precise definition of the performance gap, so please be specific.
- At this point, you should not try to identify interventions to resolve the performance gap or even discuss ways to close the gap. Keep an open mind about a solution to the performance problem—at least until Unit 8.

There are templates available for every assignment in this course. These templates delineate the requirements needed to complete each assignment successfully.

u01d1 - Distinguishing Between Behavior and Accomplishment

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

In Chapter 1 of your *Human Competence* text, use Table 1-1 to illustrate the difference between "behavior" and "accomplishment." While we can count behaviors, such as the target-shooting behaviors in Table 1-1, the critical thing is *accomplishment*—how many times the shooters hit the target. Gilbert also gives us a simple formula for judging whether our accomplishment is "worthy"—whether it has value, usually monetary value.

For this discussion, you will:

1. Watch the Interactive media W = A/B Theorem (linked in Resources).
2. Use Gilbert's W = A/B Theorem. Describe an activity in your work in terms of worthy performance.
    - What do you accomplish, in terms of measurable, valuable results?
    - What is the cost of the behavior you put into this activity (the amount of pay you receive as you carry out the behaviors needed to accomplish the results, as well as other costs).
3. Describe a second activity in your work in the same terms. This time, find an activity that may have more or less worth—an activity that costs more to produce results or an activity that produces less-valuable results than the first activity.
4. Compare these two activities:
    - What did you learn by calculating the worth of these two activities?
    - How can these lessons and ideas be applied to whole organizations?

Response Guidelines

Respond to at least one learner. Comment on the implications of the results that he or she addressed. Can you add to the implications already mentioned?

Course Resources
Graduate Discussion Participation Scoring Guide
W = A/B Theorem | Transcript

u01d1 - Learning Components

- Recognize a performance problem.
- Define measurable terms.
- Apply measurable terms.

u01d2 - The Behavioral Engineering Model

Gilbert's Behavioral Engineering Model is a very powerful tool for many stages in the HPT model. It can be used to identify root causes of poor performance and to design interventions to address those root causes.

For this discussion, write a post of approximately 200 words in which you:

- Identify one or more causes of this poor performance (lack of information, lack of necessary tools, and so on).
- Describe the symptoms of the performance problem.
- Identify any performance gaps between levels of desired performance and current performance.
- Discuss what you learned from using the BEM to understand the root causes of poor performance in this situation.

Response Guidelines

Respond to at least two learners, using critical thinking to identify strengths and development needs in their posts.

Course Resources

Graduate Discussion Participation Scoring Guide

u01d2 - Learning Components

- Identify a performance gap.
- Determine effect of performance gap on an organization.

Unit 2 >> Intervention Selection Process

Introduction

Just as there are many different kinds of performance problems and causes, so are there numerous solutions or performance-improvement interventions. A quick scan of the texts for this course will reveal dozens—even hundreds—of potential interventions to improve performance. How does one go about determining appropriate solutions for the need? It goes back to the root-cause analysis: What is causing the performance gap?

In this unit, you will focus on the intervention selection process itself and the many factors you must consider when choosing an intervention to resolve a performance gap.

Learning Activities

u02s1 - Studies

Readings

Use your *Fundamentals of Performance Improvement* text to read the following:

- Chapter 4, "Overview of Performance Analysis," pages 123–132.
- Chapter 5, "Organizational Analysis," pages 133–144.
- Chapter 6, "Environmental Analysis," pages 145–154.
- Chapter 7, "Gap Analysis," pages 155–162.
- Chapter 8, "Cause Analysis," pages 163–179.
- Chapter 9, "Intervention Selection," pages 195–242.

Use your *Human Competence: Engineering Worthy Performance* text to read the following:

- Chapter 2, " Measuring Human Competence," pages 43–52, and pages 59–72.
- Chapter 3, “The Behavior Engineering Model,” pages 73–108.
- Chapter 4, “The Performance Matrix,” pages 111–142.

Use the Capella library to complete the following:

- Pershing, J. A. (Ed.). (2006). *Handbook of human performance technology: Principles, practices, and potential* (3rd ed.) San Francisco, CA: Pfeiffer.
    - Read the following:
        - Chapter 1, "Human Performance Technology Fundamentals:"
            - "Intervention Selection and Feasibility Analysis," pages 21–24.
        - Chapter 2, "The Performance Architect's Essential Guide to the Performance Technology Landscape:"
            - "What is Performance Architecture," pages 42–48.
        - Chapter 8, Aligning Human Performance Technology Decisions With an Organization's Strategic Direction:"
            - "Phase 3," page 205.
        - Chapter 35, "Using Content Analysis During Intervention Selection and Design," page 824.
        - Chapter 39, "Using an HPT Model to Become Management's Partner," pages 924–942.
    - Review the following:
        - Chapter 9, "Analysis and More:"
            - Tables 9.4 and 9.5, pages 218–219.
- Cicerone, B., Sassaman, R., & Swinney, J. (2005). The path to improved performance starts with theory: A lesson learned from Tom Gilbert. *Performance Improvement, 44*(2), 9–14.

Use the Internet to complete the following:

- IntraHealth International, Inc. (n.d.). Step 1: Propose and select interventions. Retrieved from https://www.intrahealth.org/sst/step7-1.html

Multimedia

Complete the following:

- Watch the interactive Selecting Interventions for Human Performance Improvement.
    - Pay careful attention to the process steps and the factors to consider before making final intervention selections.
- Watch the interactive Intervention and Design Process Q&A Session.

Optional Readings

Use the Capella library to read the following:

- Pershing, J. A. (Ed.). (2006). *Handbook of human performance technology: Principles, practices, and potential* (3rd ed.). San Francisco, CA: Pfeiffer.
    - Chapter 39, "Using an HPT Model to Become Management's Partner," pages 924–942.
- Nel, B. (2013). *Performance in a box: Performance improvement toolbox for human resources*. Randburg, South Africa: Knowres.
- Long, H. (2015). Intervention selection: An examination of evidence and changes in belief during the decision-making process. *Performance Improvement Quarterly, 28*(2), 27.
    - This article discusses changes in performance-improvement professionals related to sources of evidence in intervention programs.
- Bernardez, M. L. (2009). Surviving performance improvement "solutions": Aligning performance-improvement interventions. *Performance Improvement Quarterly, 22*(2), 111–127.
    - This article examines how organizations can avoid negative effects of performance improvement interventions.

u02a1 - Statement of the Problem

Read the Intervention Solution Proposal course project description to ensure you meet the requirements for this assignment.

As a performance improvement consultant, you should collaborate with key stakeholders to formulate this proposal. The proposal should be written so that you or these stakeholders can present your proposal to leadership for approval and funding. Refer to the linked Resources to support you as needed.

For this assignment, you will:

1. Select a performance improvement problem.
2. Use the Statement of Problem template linked in Resources to complete this assignment.
3. Make an initial analysis of the situation. Discuss how the organization is losing profit, productivity, quality, and so on, as a result of this performance problem.
4. Post a draft of your Statement of the Problem for peer feedback.
5. Incorporate the desired peer feedback. Revise your work and submit in the assignment area.

Course Resources

APA Style and Format

Research Guide - Training & Performance Improvement

Capella University Library

Statement of the Problem Template [DOC]

u02d1 - Factors to Consider

The models in the unit studies identified factors that must be considered when evaluating the appropriateness of interventions for a particular situation, such as life cycle of the solution (time); linkage of solution to organizational goals and strategic objectives; management interest; cost of the solution; size of the target audience; and distance. In your experience, are there other factors that should be thought out? Are there any factors that you will find difficult to evaluate?

For this discussion:

1. Write a short description of important factors for selecting interventions for the project you are considering.
2. Describe the constraints, opportunities, or expectations you must take into account.

Response Guidelines

Review the responses from several learners to discover if they are describing factors that you should also consider for your own project. Respond to at least one learner with questions or suggestions regarding the factors he or she is considering. Remember to include all these factors in your intervention selection worksheet.

Course Resources

Graduate Discussion Participation Scoring Guide

u02d1 - Learning Components

- Assess organizational needs.
- Explore causes of performance gaps.
- Recognize effect of performance gap on stakeholders.

u02d2 - Post Draft of Statement of the Problem

For this discussion:

1. Complete the Unit 2 assignment, Statement of the Problem, using the template linked in Resources.

2. Post a draft of the assignment to the discussion.

You will use the feedback from other learners to enhance your draft before submitting the final assignment.

Response Guidelines

Refer to the Statement of the Problem Scoring Guide to provide feedback to at least two other learners.

1. Review the posts of other learners and select several projects that you will follow throughout this course.
2. Carefully review the Statement of the Problem for each selected project and respond to the author with questions or suggestions for clarification.

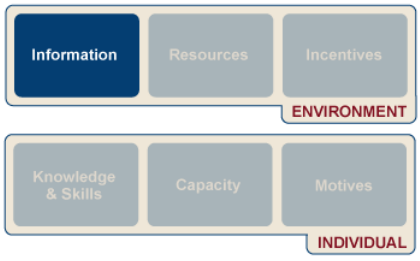
Course Resources
Graduate Discussion Participation Scoring Guide
Statement of the Problem Template [DOC]

u02d2 - Learning Components

- Use proper grammar and punctuation.
- Apply academic writing skills.

Unit 3 >> Information Interventions

Introduction



Imagine starting a new job where no one tells you what you are expected to do. Or perhaps you are told what to do but not that you are expected to follow specific procedures to get the job done. Suppose that you have been working at this job for two weeks and have not received any feedback indicating whether your accomplishments meet expectations:

- How would you feel?
- Do you think you would be working at peak performance under these circumstances?

This is the first in a series of units exploring the many different kinds of potential interventions. This unit focuses on the first cell in Gilbert's (2013) model, Information. This cell contains three main topics: expectations, feedback, and work guidelines. A fourth topic, data, could also be included.

Expectations

Expectations can be expressed in formal organizational documentation such as mission, vision, and values statements or job descriptions. They could be built into task assignments such as the tolerances and specifications in an engineering schematic. There may be other formally documented standards of performance. Perhaps they are informally communicated on the job by supervisors and peers. If a worker is not performing as expected, ask first how those expectations are being communicated to the worker.

Feedback

You will read about some formal feedback programs such as 360-degree feedback and performance appraisals. Do not overlook the power of the informal and often impromptu feedback, such as a smile, a question, or a passing comment to guide a worker's performance in the desired direction. Pay attention to ways of providing both confirmative and corrective feedback. Confirmative feedback assures performers that they are on the right track and corrective feedback helps underperformers get back on track.

Work Guidelines

Work guidelines simply communicate how the task is to be completed. Job aids are useful tools here. Documented work instructions are a vital component of such quality initiatives as ISO 9000.

It is important to note that work guidelines do not teach a person the knowledge or skills to complete the task. Remember that Information is one of the environment cells in Gilbert's model; it addresses those items external to the individual, whereas knowledge and skill are internal. Therefore, work guidelines communicate the standards or expectations for steps in performing the task. They may also be reminders of steps in a procedure or process. Such consistency is important in quality programs.

Data

To perform a task efficiently, the worker must have easy access to necessary data such as codes, interest rates, phone numbers, prices, and costs. Many types of data are subject to frequent change, so you should discourage workers from memorizing it. Instead, make the most current data easily accessible. Look for interventions to accomplish this.

Collect Intervention Ideas

As you explore the many interventions in this unit, create a log of interventions with indicators that a particular intervention should be considered. You may have several interventions for each situation.

A Word About the Textbooks

Your *Fundamentals of Performance Improvement* text is filled with information about various interventions and will prove a valuable reference tool. *Fundamentals of Performance Improvement* also contains job aids that you can use in your own setting. You may wish to record other resources about a particular type of intervention in one of these texts or in your log of interventions.

Reference

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.

Learning Activities

u03s1 - Studies

Readings

Use your *Human Competence: Engineering Worthy Performance* text to read the following:

- Chapter 6, "Information and Competence," pages 175–210.

Use your *Fundamentals of Performance Improvement* text to read the following:

- Chapter 12, "Job Analysis/Work Design Interventions," pages 291–312.
- Chapter 13, "Personal Development Interventions," pages 313–324.
- Chapter 15, "Organizational Communication Interventions," pages 363–372.

Use the Capella library to read the following:

- Pershing, J. A. (Ed.). (2006). *Handbook of human performance technology: Principles, practices, and potential* (3rd ed.). San Francisco, CA: Pfeiffer.
    - Chapter 26, "Knowledge Management, Organizational Performance, and Human Performance Technology," pages 619–639.

Internet Resources

Cybernetics is one of the theoretical frameworks for understanding the importance of information in individual and organizational performance. Use the Internet to complete the following:

- George Washington University. (n.d.). The history and development of cybernetics [PPT]. Retrieved from http://www.gwu.edu/~asc/slideshow/HistoryCybernetics_English.ppt

A related framework is *single-* and *double-loop learning*, developed by Chris Argyris and Donald Schön. Use the Internet to complete the following:

- Dooley, J. (1999). Problem-solving as a double-loop learning system [PDF]. Retrieved from http://www.well.com/user/dooley/Problem-solving.pdf

- Fast Company. (2004, December 16). Creating a learning-driven culture [Blog post]. Retrieved from http://www.fastcompany.com/blog/fast-company-staff/fast-company-blog/creating-learning-driven-culture
- Infed. (n.d.). Chris Argyris: Theories of action, double-loop learning and organizational learning. Retrieved from http://www.infed.org/thinkers/argyris.htm

Self-Paced Tutorial

Complete the following Skillsoft tutorial about providing both positive and constructive feedback.

- Go to Giving Feedback.
  - Complete all of the topics in all of the lessons on the page. This tutorial runs approximately 1 hour.

Skillsoft Technical Support

Capella provides Academic Technical Support to help learners with technical issues in courses. Visit the Online Technical Support Center if you have any issues with the Skillsoft self-paced tutorials.

Optional Activities

Reading

Use the Capella library to learn more about giving feedback to improve performance:

- Turaga, R. (2017). The art of giving feedback. *IUP Journal of Soft Skills*, *11*(2), 53–61.

Self-Paced Tutorial

This Skillsoft tutorial will explain the importance and phases of a performance management system.

- Go to Planning for Performance.
  - Complete all of the topics in all of the lessons on the page. This tutorial runs approximately 1 hour.

u03s2 - Intervention Log

Intervention Log

Start logging interventions that might be used to address the performance gaps you identified in your Statement of the Problem assignment. An *intervention log* is simply a document where you catalog intervention examples as you progress through the course. Use the log as an idea bank of potential interventions. You can list the interventions using the same headings found in the assessment templates.

u03d1 - Information Interventions

In Gilbert's model, Information interventions fall into one of three main categories:

- Expectations and standards.
- Work instructions and guidance.
- Feedback.

A fourth category could easily be added:

- Access to information.

For this discussion:

1. Select one of the above categories.
2. Write a 250–300 word post that describes:

- The importance of the category.
- Indicators of a need for performance improvement in this area.
- One theory or conceptual framework that you consider significant to understanding this category of interventions. (Examples for this unit: Argyris's double-loop learning, cybernetics; a framework for an effective job description.)
- Various solutions or interventions to improve performance.

Response Guidelines

Respond to two learners' posts in different categories (for example, respond to one learner who wrote about expectations and one learner who wrote about access to information). Focus your response on the importance of these categories for improving performance. Can you suggest other indicators or solutions?

Course Resources

Graduate Discussion Participation Scoring Guide

Gilbert's Behavioral Engineering Model (BEM) | Transcript

u03d1 - Learning Components

- Explore options for performance problem intervention.
- Differentiate various theoretical frameworks.
- Apply theoretical framework to an intervention design.

u03d2 - Information Interventions for Your Project

For this discussion, consider how an Information intervention might address the performance gaps in your organization.

- Use what you have learned in this unit to write a 200–300 word description of a possible Information intervention to address a performance gap in your organization. This may be a performance gap you have identified for your project or another performance gap.
- Use this outline to describe a possible Information intervention:
  - **Intervention title.**
  - **Purpose.**
  - **Target audience.**
  - **Theory.** Describe the theory that undergirds your design of the intervention.
  - **Timing.** How long will it take to implement the intervention?
  - **Requirements.** What kinds of logistical and other elements are required to make the intervention work?
  - **Design description.** Describe in detail the critical elements of the intervention, the sequence or arrangement of these elements, and any other description that will help you or others create the supporting material that will implement the intervention.

Response Guidelines

Respond at least two other learners. Provide constructive feedback and address the following questions in your responses:

- Does the intervention description address the performance problem?
- Does the intervention description fully explain each of the elements in the outline?

Course Resources

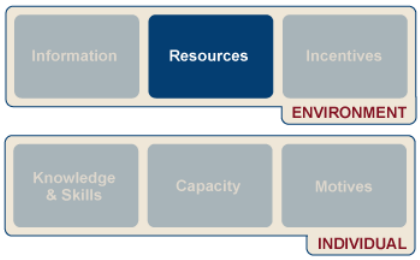
Graduate Discussion Participation Scoring Guide

u03d2 - Learning Components

- Deconstruct a performance gap to find root cause.
- Evaluate causation.
- Explore non-training intervention designs.

Unit 4 >> Resources and Structure Interventions

Introduction



Have you ever been stymied in completing a job because you lacked the right tools, resources, and access to the right people? Have you ever worked without direction at a task because no one had figured out a way to organize the work process? More than likely you answered yes to both questions. Your inability to complete a particular job task probably had little to do with skills, but it may have had a lot to do with a poorly organized work environment.

This unit focuses on the second cell in Gilbert's (2013) model: Resources. The resources cell includes many environmental factors that must be in place to achieve high performance levels, such as:

- Tools and equipment in good working order.
- Proper ergonomics and conducive human factors.
- Safety.
- Sufficient materials of appropriate quality.
- Adequate personnel time.
- Access to leaders.
- Organized work processes.
- Strategic alignment of workers, work processes, and organizational structure.
- Functional work teams.

It is easy to remember that this cell in Gilbert's model includes tools, materials, and people. We must also remember that it includes the very important topics of structure and process. Geary Rummler and Alan Brache, leading theorists in performance improvement, state:

> If you pit a good performer against a bad system, the system will win almost every time. We spend too much of our time "fixing" people who are not broken, and not enough time fixing organization systems that are broken (1995, pp.15–16).

In this unit, we will look at organizations as systems.

Is It Analysis or Intervention?

As you read some of the study assignments for this unit and participate in the discussions, you may wonder if techniques such as process mapping are really interventions or just more analysis tools. The answer is yes to both.

The initial cause analysis may have identified a deficient or inefficient process, but not provided the details identifying parts of the process that could be improved. Process mapping is an analytical tool that will reveal specific problems with the process. Like a zoom lens on a camera, you are zooming in to look more closely at each step in the process. The closer you look, the more that gaps, bottlenecks, and other deficiencies in the process become apparent and the solutions, obvious.

The mere act of mapping the current and desired process is an intervention because you have focused the attention of the workers on the process steps and indices, which may result in changes in their behaviors. Until you map the process, you will not know if the process is flawed or if the process is fine but the workers are not following it. The resulting map documents the process and can serve as a work guideline, as described in Unit 3.

Similarly, you will need to use other, more detailed analytical tools to zoom in and get a closer look at materials inventory, staff loading, equipment usage and repair records, work-related injuries, and safety violations. Record-keeping alone is an intervention; it is the first step in behavioral modification programs. Once you can see a problem clearly, the appropriate solution will begin to emerge.

References

Gilbert, T. F. (2013). *Human competence: Engineering worthy performance* (tribute ed.). San Francisco, CA: Pfeiffer.

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.

Learning Activities

u04s1 - Studies

Readings

Use your *Fundamentals of Performance Improvement* text to read the following:

- Chapter 12, "Job Analysis/Work Design Interventions," pages 291–312.
- Chapter 16, "Organization Design and Development," pages 373–394.
- Chapter 17, " Financial Systems Interventions," pages 395–406.

Use the Capella library and the Internet to complete the following:

- Pershing, J. A. (Ed.). (2006). *Handbook of human performance technology: Principles, practices, and potential* (3rd ed.). San Francisco, CA: Pfeiffer.
  - Chapter 42, "The Anatomy of Performance: A Framework for Consultants," pages 986–1007.
- Marrelli, A. F. (2005). The performance technologist's toolbox: Process mapping. *Performance Improvement*, *44*(5), 40–44.
  - This article reviews process mapping and data collection methods.
- Rummler, G. A. (2003). The Human Performance System [PDF].
  - Skim over the discussion about consequences and focus on the HPS model itself. You will examine the consequences in Unit 5. Be prepared to analyze the human performance system for a key performer in your course project and discuss the results you find.
- Free Management Library. (n.d.). Systems thinking, systems tools and chaos theory. Retrieved from http://managementhelp.org/systems/index.htm#anchor12345
  - General systems theory is a theoretical thread running through many interventions that can be classified as resources and structure interventions. Read the following to get some grounding in systems theory and systems thinking:
    - Basics—Definitions.
    - Under the topic "What's Systems Theory," look particularly at the link to "Systems Theory."
    - Under "What Are Some Systems Principles," go to "Some Systems Principles (for changing systems)."
    - Under "What Are Some Systems Tools?," go to "Causal Loop Diagrams" and "System Diagrams."
    - Under "Organizations as Open Systems," go to "Open Systems Concepts" and "What's an Open System?"
    - Feel free to explore other links on this page to understand more about systems and systems thinking.
- McNamara, C. (n.d.). Thinking about organizations as systems. Retrieved from http://managementhelp.org/organizations/systems.htm

Cross-Functional Flowchart

Use the Internet to complete the following:

- Print the Cross-Functional Flowchart Template [DOC].
  - Be prepared to complete a process map for your course project or another process. You will learn how to use a cross-functional flowchart to map a process and identify bottlenecks and inefficiencies.
- View the Cross-Functional Flowchart animation.

Optional Readings

Use the Capella library to complete the following:

- Baumeister, R. F., & Alghamdi, N. (2015). Resource-based interventions in the workplace: Integration, commentary, and recommendations. *Journal of Occupational & Organizational Psychology*, *88*(3), 623–629.

Process Mapping

Use the Internet to complete the following:

- Iowa State University Facilities Planning and Management. (n.d.). Process mapping: What is process mapping? Retrieved from http://www.fpm.iastate.edu/worldclass/process_mapping.asp

Performance Improvement Consulting

Use the Internet to complete the following:

- Kirkpatrick Partners. (n.d.). The Kirkpatrick model. Retrieved from http://www.kirkpatrickpartners.com/Our-Philosophy/The-Kirkpatrick-Model
- ROI Institute. (n.d.). Retrieved from http://www.roiinstitute.net/
- The Thiagi Group. (n.d.) Retrieved from http://www.thiagi.com/

u04d1 - Process Map

For this discussion:

1. Choose a process related to your performance-improvement project or one from your work experience that could use some improvement. Make sure that the chosen process involves multiple job roles or departments.
2. Print the Cross-Functional Flowchart template linked in Resources and follow the instructions to sketch the process as it currently exists. You may use a template from Microsoft Visio if you prefer.
    - Refer to the examples of cross-functional flowcharts on page 1003 of the *Handbook of Human Performance Technology* and in the tool kit of Performance Improvement – Stages, Steps and Tools (linked in Resources).
    - Refer also to the guidelines in Marelli's article, "The Performance Technologist's Toolbox: Process Mapping," linked in Resources.
3. Sketch the process as it currently exists. Note any unusual delays or areas of potential improvement in the process.
4. Post the process map and a description of your experience in mapping this process, addressing the following:
    - Are there areas of the process that are fuzzy?
    - Are there any unusual delays?
    - Are there areas that obviously need some improvement?
    - Are there areas that require some measurement or further analysis before you recommend changes?
    - Based on your analysis so far, do you see any ways to improve this process? If so, how might the organization gain from this process improvement?

Response Guidelines

Respond to at least one learner. Focus your comments on the experiences and discoveries he or she made through process mapping.

Course Resources
Graduate Discussion Participation Scoring Guide
Performance Improvement: Stages, Steps and Tools
Cross-Functional Flowchart Template [DOC]
The Performance Technologist's Toolbox: Process Mapping

u04d1 - Learning Components

- Recognize a performance gap.
- Identify a root cause.
- Identify appropriate non-training interventions to address a performance problem.
- Differentiate theoretical frameworks.

u04d2 - HPS: Human Performance System

For this discussion, refer to the diagrams of human performance systems on pages 992 and 1202 of the *Handbook of Human Performance Technology* and Figure 10 in Rummler's "The Human Performance System" (linked in Resources).

- Select a job performer who is at the center of the performance gap described in your Statement of the Problem in Unit 1:
    - Where could there be some improvement?
    - With that job in mind, how well are all of the conditions in Figure 42.3 on page 992 satisfied?
- Now look at the job situation from the performer's viewpoint as shown in Figure 52.7 on page 1202.
    - How do you think the performer perceives the four system variables: direction, support, consequences, and feedback?
- Post a description of your findings for each of the above analyses.
    - Identify and discuss which types of improvements are needed.

Response Guidelines

Respond to at least two other learners. Ask probing questions or seek clarification where needed.

Course Resources

Graduate Discussion Participation Scoring Guide

The Human Performance System [PDF]

Handbook of Human Performance Technology

u04d3 - Possible Resource and Tools Interventions for Your Project

For this discussion, you will consider how a Resource and Tools intervention might address the performance gaps in your organization.

- Use what you have learned in this unit to write a 200–300 word description of a Resource and Tools intervention to address a performance gap in your organization. This may be a performance gap you have identified for your project or another performance gap.
- Use the following outline to describe a possible Resource and Tools intervention:
  - **Intervention title.**
  - **Purpose.**
  - **Target audience.**
  - **Theory.** Describe the theory or conceptual framework that undergirds your design of the intervention. Examples for this unit: process mapping, new computer systems.
  - **Description of successful examples from the literature.** Who has implemented a similar intervention? What was the impact on performance?
  - **Timing.** How long will it take to implement the intervention?
  - **Requirements.** What kinds of logistical and other elements are required to make the intervention work?
  - **Design description.** Note this is not an implementation plan. Give a detailed description of the critical elements of the intervention, the sequence or arrangement of these elements, and any other description that will help you or others create the supporting material to implement the intervention.

Response Guidelines

Review and comment on the work of two other learners. Offer resources to support their designs with theory and successful examples from the literature. Help them with feedback about the description of the elements of the intervention as well as the sequencing of these elements or other relevant arrangement of the elements.

Course Resources

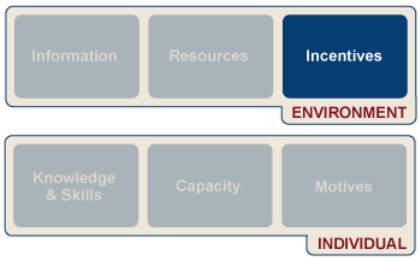
Graduate Discussion Participation Scoring Guide

u04d3 - Learning Components

- Define performance gaps.
- Differentiate severity of performance gaps.

Unit 5 >> Incentive Interventions

Introduction



Have you ever worked in a position where you were penalized for doing a good job? Unfortunately, this happens all too often. Consider the salaried employee who is always asked to do the more difficult and demanding tasks because she can be relied upon to do a good job. This employee will eventually resent having to stay late and work overtime—usually without additional compensation—while the less-capable coworkers go home on time every night. Consider also the worker who is derided and shunned by his peers for raising the productivity bar. This productive worker will likely resign or slow his production to a level that pleases his coworkers. Gilbert (2013) distinguishes between two aspects of motivation:

- *Incentives* are the external rewards available in the work environment.
- *Motives* are the internal desires of the individual.

This unit explores the third cell in Gilbert's model: Incentives. The key factors in the incentives cell are:

- Adequate financial compensation contingent upon performance. This includes not only direct pay, but benefits and valuable perks such as a company car.
- Nonfinancial rewards, recognition, and status perks such as a corner office. This includes inexpensive trinkets, achievement certificates, and public and private commendations. Most important, it includes the all-powerful "Thank you for a job well done." This aspect of incentives is very closely linked with feedback, as discussed in Unit 3.
- Career development opportunities. This includes monetary support for attendance at professional conferences, opportunities to develop new skills, and opportunities to demonstrate capabilities that could lead to promotion or greater responsibility.

Alignment of Consequences

Look also at the possibility that you may need to provide incentives for supervisors to support the desired performance of their staff. Sometimes the consequences and incentives are not as well aligned in the organizational structure as they should be. One company wanted all employees to complete some training, but the first-line supervisors were not enthusiastic about releasing their employees for the time to complete the training. The solution was to include an item in each senior manager's bonus plan that was contingent upon all their subordinates meeting their training requirements.

References

Collins, J. (2014). *Good to great: Why some companies make the leap and others don't*. New York, NY: Harper Collins.

Gilbert, T. F. (2013). *Human competence: Engineering worthy performance*. San Francisco, CA: Pfeiffer.

Learning Activities

u05s1 - Studies

Readings

Use your *Fundamentals of Performance Improvement* text to read the following:

- Chapter 8, "Cause Analysis (Analyzing Expectations)," pages 163–178.

Use the Capella library and the Internet to complete the following:

- Pershing, J. A. (Ed.). (2006). *Handbook of human performance technology: Principles, practices, and potential* (3rd ed.). San Francisco, CA: Pfeiffer.
  - "Financial Incentives That Create Value," pages 488–490.
- Norberg, P. A. (2017). Employee incentive programs: Recipient behaviors in points, cash, and gift card programs. *Performance Improvement Quarterly*, *29*(4), 375–388.
- Olafsen, A. H., Halvari, H., Forest, J., & Deci, E. L. (2015). Show them the money? The role of pay, managerial need support, and justice in a self-determination theory model of intrinsic work motivation. *Scandinavian Journal of Psychology*, *56*(4), 447–457.
- Rummler, G. A. (2003). The Human Performance System [PDF].

- Review the paper, focusing on the consequences sections and example. Be prepared to complete the consequences tree for a key performer.

Self-Paced Tutorial

Complete the following self-paced tutorial, which explores how employees and employers impact organizational culture.

- Go to Organizational Behavior: Dynamics of a Positive Organizational Culture.
  - Complete all of the topics in all of the lessons on the page. This tutorial runs approximately one hour.

Optional Readings

Use your *Human Competence Engineering* text to read the following:

- Chapter 10, "Motivation and Human Capital," pages 307–330.

Use the Capella library to learn more about money and workplace motivation:

- Dickinson, A. (2005). Are we motivated by money? Some results from the laboratory. *Performance Improvement, 44*(3), 18–24.
- Stiffler, M. A. (2006). Incentive compensation management: Making pay for performance a reality. *Performance Improvement*, *45*(1), 25–30.

u05d1 - Rummler's Consequences Tree

For this discussion:

1. Print a blank copy of the Consequences Tree (linked in Resources).
2. Select a key performer from your course project or another performance-improvement situation who is producing undesired output or insufficient desired output.
3. Complete the Consequences Tree for that performer and consider the following questions in your discussion:
   - What did you discover when you completed the Consequences Tree?
   - How and when might you use this tool in the future?
   - How might you adapt this tool to work with teams?
4. Attach your Consequences Tree to your main response to the discussion question.

Response Guidelines

Respond to at least one other learner. Focus your comments on the usefulness of the tool.

Course Resources
Graduate Discussion Participation Scoring Guide
Consequences Tree [DOC]

u05d1 - Learning Components

- Recognize a performance gap.
- Evaluate root causes of performance gaps.

u05d2 - Incentives Interventions for Your Final Project

For this discussion, identify and discuss how an Incentive intervention might help to address the performance gaps in your organization.

- Use what you have learned in this unit and write a 200–300 word description of an incentive intervention to address a performance gap in your organization. This may be a performance gap you have identified for your project or it may be another performance gap.
- Use the following outline to describe an Incentive intervention:
  - **Intervention title**.

- **Purpose**.
- **Target audience**.
- **Theory.** Describe the theory or conceptual framework that undergirds your design of the intervention. Examples for this unit: Rummler's Consequence Tree, Herzberg's Two Factor Theory.
- **Description of successful examples from the literature.** Who has implemented a similar intervention? What was the impact on performance?
- **Timing.** How long will it take to implement the intervention?
- **Requirements.** What kinds of logistical and other elements are required to make the intervention work?
- **Design description.** Give a detailed description of the critical elements of the intervention, the sequence or arrangement of these elements, and any other description that will help you or others create the supporting material to implement the intervention.

Response Guidelines

Review other learners' posts and add their ideas to your reference list of interventions. Respond to at least one other learner. Focus your comments on the value of incentive interventions.

Course Resources

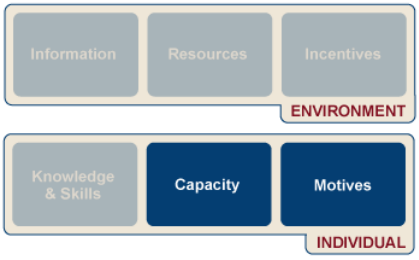
Graduate Discussion Participation Scoring Guide

u05d2 - Learning Components

- Demonstrate knowledge of training interventions.
- Recognize effective training design elements.
- Summarize training intervention design best practices.

Unit 6 >> Motivation and Capacity Interventions

Introduction



In *Good to Great*, Jim Collins writes:

> First Who... Then What. We expected that good-to-great leaders would begin by setting a new vision and strategy. We found instead that they first got the right people on the bus, the wrong people off the bus, and the right people in the right seats—and then they figured out where to drive it. The old adage "People are your most important asset" turns out to be wrong. People are not your most important asset. The right people are (2001, p.13).

This unit is about finding the right people to get on the bus, finding the right seats for them, and then keeping them happy. This unit addresses the last two cells in Gilbert's (2013) model: Capacity and Motives.

Capacity

Capacity refers to the mental, emotional, and physical abilities of workers to perform desired tasks. One aspect of this cell is a good match between the abilities of the individual and the requirements of the job or position. Thus, good selection processes are important here. This category also includes flexible scheduling of the work to match peak performance capacity of the workers. A final element for capacity is the use of prostheses or aids to augment physical capacity.

As you browse through the many capacity-related interventions in your texts, pay special attention to those that are less familiar to you. There are many different aspects to this cell in Gilbert's model.

Motives

Remember that motives are internal to the individual as opposed to incentives, which are environmental. The key factors in the motives cell are:

1. Assessment of people's motives to work.
2. Recruitment of people to match the realities of the situation.

The challenge in this area is to hire employees who are motivated to do the kind of work needed, then to keep them happy by addressing all the factors in the environment in Gilbert's model. Provide all the education and training they need and offer them the flexibility to work at their peak performance. Another factor that influences internal motives is a sense of pride in the organization and its contributions to society. A positive organizational image helps influence motives.

References

Collins, J. (2001). *Good to great: Why some companies make the leap and others don't*. New York, NY: Harper Collins.

Gilbert, T. F. (2013). *Human competence: Engineering worthy performance*. San Francisco, CA: Pfeiffer.

Learning Activities

u06s1 - Studies

Readings

Use your *Fundamentals of Performance Improvement* text to browse the following chapter selections:

- Chapter 12, "Job Analysis/Work Design Interventions:"
  - "Work Design," pages 291–308.
- Chapter 13, "Personal Development Interventions:"
  - "Emotional, Social, Cultural Intelligence," pages 319–321.
  - "Communities of Practice," page 321.
- Chapter 14, "HRD Interventions:"
  - "Human Resource Management," pages 325–328.
  - "Health and Wellness," pages 339–340.
  - "Competency Testing and Assessment Centers," pages 350–351.
  - "Succession Planning," pages 352–353.
  - "Leadership, Executive, Management, and Supervisory Development," pages 353–357.
- Chapter 15, " Organizational Communication Interventions:"
  - "Grievance Systems," pages 366–369.
  - "Conflict Resolution," pages 369–370.
  - "Social Media," pages 370–371.
- Chapter 16, "Organization Design and Development"
  - "Organizational Values," pages 386–391.

In preparation for your Unit 6 discussion, use your *Fundamentals of Performance Improvement* text to read the following:

- Chapter 11, "Performance Support Interventions," pages 281–290.
- Chapter 12, "Job Analysis/Work Design Interventions," pages 291–298.

Use the Capella library to read the following:

- Pershing, J. A. (Ed.). (2006). *Handbook of human performance technology: Principles, practices, and potential* (3rd ed.). San Francisco, CA: Pfeiffer.
  - Chapter 20, "Motivating Individuals, Teams, and Organizations," pages 478–497.

Optional Readings

Use the Capella library to complete the following:

- Cerasoli, C. P., Nicklin, J. M., & Ford, M. T. (2014). Intrinsic motivation and extrinsic incentives jointly predict performance: A 40-year meta-analysis. *Psychological Bulletin*, *140*(4), 980–1008.
- Rampersad, H. (2006). Self-examination as the road to sustaining employee engagement and personal happiness. *Performance Improvement*, *45*(8), 18–25.

- Tosti, D. T., & Amarant, J. (2005). Energy investment beyond competence. *Performance Improvement*, *44*(1), 17–22.
    - This article examines motivational factors that arise from organizational conditions and climates.

u06d1 - Motivation and Culture Job Aids

For this discussion:

1. Post an analysis of a job in your organization.
    - Remember to use a fictional name for the organization.
    - You may use the job aid from Van Tiem, Moseley, and Dessinger's *Fundamentals of Performance Improvement* text.
2. Complete the Performance Support Tool 12.1: Job Analysis Survey found in *Fundamentals of Performance Improvement*.
    - Determine which capacities are required to do the job you analyzed.
    - Attach the support tool to your discussion post.
3. Post a summary of the results of the job analysis survey.
4. Post the completed Job Analysis Survey with your comments. Based on these results:
    - What are the implications for your organization?
    - What did you learn from completing these job aids?
    - How easy or difficult was it to complete these job aids?

Response Guidelines

Respond to the post of at least one learner. Focus on what was learned through completing these job aids.

Course Resources

Graduate Discussion Participation Scoring Guide

u06d1 - Learning Components

- Define specific organizational needs.
- Assess evaluation strategies for positive outcomes.

u06d2 - Capacity and Motivation Interventions for Your Project

For this discussion:

1. Describe how a Capacity and Motivation intervention might help address the performance gaps in your organization.
2. Use what you have learned in this unit and write a 200–300 word description of a possible Capacity and Motivation intervention to address a performance gap in your organization. This may be a performance gap you have identified for your project or another performance gap.
3. Use the following outline to describe a possible Capacity and Motivation intervention:
    - **Intervention title.**
    - **Design description.** While this is not an implementation plan, you should give a detailed description of the critical elements of the intervention, the sequence or arrangement of these elements, and any other description to help you or others create supporting material to implement the intervention.
    - **Requirements.** What kinds of logistical and other elements are needed to make the intervention work?
    - **Timing**. How long will it take to implement the intervention?
    - **Description of successful examples from the literature.** Who has implemented a similar intervention? What was the impact on performance?
    - **Theory.** Describe the theory or conceptual framework that undergirds your design of the intervention. Examples for this unit: motivational theories; job capacities, such as emotional intelligence, problem-solving skills, writing and speaking skills.
    - **Target audience.**
    - **Purpose.**

Response Guidelines

Read the posts of your fellow learners and add their ideas to your reference list of interventions. Respond to at least one other learner. Focus your comments on the consequences of the situation.

Course Resources

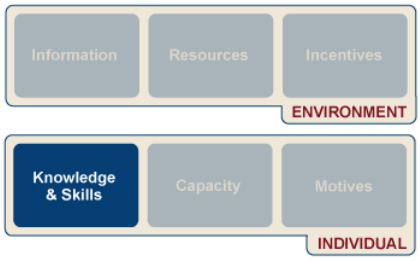
Graduate Discussion Participation Scoring Guide

u06d2 - Learning Components

- Analyze performance improvement practices.
- Critique the performance of organization.
- Evaluate change-management strategies.

Unit 7 >> Knowledge and Skill Interventions

Introduction



This unit is about knowledge and skill interventions. This is the first cell in the lower row of Gilbert's (2013) model. All of the cells in this row address factors within the individual.

Training and education interventions are perhaps the most familiar to us, so we tend to choose these solutions more often. As a performance consultant, you may get a request for training, when perhaps some other solution would be better. So whenever you are considering a knowledge intervention, stop and think about it first: Is there really a lack of knowledge? To quickly confirm the need for a knowledge intervention, ask the following:

1. Could the people perform the task well if their lives depended on it?
2. Do high-performing people know something that others do not?

If the answer to the first question is yes, you should not provide training because your participants would be bored, uncooperative, and possibly angry because of having to sit through unnecessary training. Instead, you should dig deeper and look more broadly for the underlying causes of poor performance and consider other interventions. Only when you can confirm that people really do not have the knowledge should you consider knowledge interventions.

To answer the second question, you would have to interview high-performing people (exemplars) and their bosses, and perhaps observe their performance. If the answer to the question is, "Yes, they do have some special knowledge or skill," you should find out what it is and share it with others to improve their job performance. If the answer to the second question is no, look for other causes of low performance.

Explore New Knowledge Interventions

Once you have confirmed that there is indeed a lack of knowledge or skill, keep an open mind as you explore the many interventions available to improve knowledge or skill. A quick review of the study assignments will reveal many options. Some may be very familiar to you and others may be new. Take this opportunity to add new interventions to your tool kit and spend your time on the less familiar options.

Remember that as a performance consultant, you should have a broad awareness of many different kinds of interventions so you can recommend the most appropriate solutions. You are not expected to be an expert in designing and developing all of them. You will most likely be working with specialists for the actual development and implementation. You need to learn a little about all of the options so you can make the best recommendations.

In the discussions you will have a chance to research a topic in more depth. Choose a topic that is new to you. Even though you do not need to respond to all of them, you might want to at least review all other learners' research findings and save the resources that they recommend.

Reference

Gilbert, T. F. (2013). *Human competence: Engineering worthy performance*. San Francisco, CA: Pfeiffer.

Learning Activities

u07s1 - Studies

Readings

Use your *Fundamentals of Performance Improvement* text to read the following excerpts:

- Chapter 10, "Learning Interventions:"
  - "Education and Training," pages 259–260.
  - "Action Learning," pages 263–264.
  - "Interactive Learning Technologies," pages 267–268.
  - "Games and Simulations," pages 272–274.
- Chapter 13, "Personal Development Interventions"
  - "Coaching," pages 314–317.
  - "Mentoring," pages 317–319.
- Chapter 22, "Techniques for Implementation and Maintenance"
  - "Learning Organization," page 496.

Use the Capella library to read *two* of the following. Browse through the rest:

- Pershing, J. A. (Ed.). (2006). *Handbook of human performance technology: Principles, practices, and potential* (3rd ed.). San Francisco, CA: Pfeiffer.
  - Chapter 15, "Instruction as an Intervention," pages 335–369.
  - Chapter 17, "Games and Simulations for Training," pages 414–436.
  - Chapter 18, "Distance Training," pages 437–454.
  - Chapter 19, "Innovations in Performance Improvement with Mentoring," pages 455–477.
  - Chapter 25, "The Fifth Discipline: A Systems Learning Model for Building High-Performing Learning Organizations," pages 592–618.
  - Chapter 27, "Coming to Terms With Communities of Practice," pages 640–664.

Use the Internet to complete the following:

- Learning Theories. (n.d.). Retrieved from https://www.learning-theories.com/
  - Read about various learning theories on this website.

Multimedia

Take Gilbert's Behavioral Engineering Model Quiz 2 to check your understanding of Gilbert's Behavioral Engineering Model (BEM). The quiz is not graded, but your understanding of the model is important.

Optional Readings

Use your *Human Competence* text to read the following:

- Chapter 7, "Knowledge Policy at Work," pages 211–230.
- Chapter 9, "Knowledge Strategies and Tactics," pages 253–306.

Use the Capella library to read the following:

- Jones, R. J., Woods, S. A., & Guillaume, Y. R. F. (2016). The effectiveness of workplace coaching: A meta-analysis of learning and performance outcomes from coaching. *Journal of Occupational & Organizational Psychology*, *89*(2), 249–277.

u07a1 - Non-Training Intervention

For this assignment:

1. Select one of the non-training interventions you wrote about in Units 3 through 6.
2. Use the Non-Training Intervention template linked in Resources to complete this assignment.
3. Post a draft of your Non-Training Intervention in the Unit 7 discussion for peer feedback.
4. Use the feedback from your peers and instructor to expand on the description and design of the intervention. Provide a full idea of how the intervention will be constructed.
5. Revise your work and submit in the assignment area.

Course Resources

APA Style and Format

Research Guide - Training & Performance Improvement

Non-Training Intervention Template [DOCX]

u07d1 - Post Draft of Non-Training Intervention

Post your draft of the Unit 7 assignment, Non-Training Intervention.

Use the feedback you receive in this discussion from your instructor and peers to improve your intervention design.

Response Guidelines

Respond to at least two other learners' drafts. Refer to the Non-Training Intervention Scoring Guide to ensure you meet the feedback criteria.

Course Resources

Graduate Discussion Participation Scoring Guide

u07d1 - Learning Components

- Use proper grammar and punctuation.
- Apply academic writing skills.

u07d2 - Research a Knowledge and Skills Topic

For this discussion, you will search your textbooks, the Internet, and the Capella library for more information on a Knowledge and Skills research topic. Campus links are provided in Resources to help you.

- Look for information that supplements and enriches our class learning beyond the assigned readings in this unit. In particular, you should look for websites or articles that provide best practices employed in the selection, design, and delivery of your selected knowledge and skills topic.
- Choose any of these topics:
  - Accelerated learning.
  - Action learning.
  - Experiential learning.
  - Gagne's Instructional Events.
  - Apprenticeships.
  - Coaching.
  - Communities of practice.
  - eLearning.
  - Mentoring.
  - On-the-job training (OJT).

- Self-directed learning.
- Simulations.
- Training games.
- Other. Check with your instructor if you would like to research a knowledge and skills intervention topic that is not already listed above.

1. Identify at least three resources to recommend to your fellow learners.
   - If you are working alone, avoid recommending the same resources as others working on the same topic.
   - If you are working as a team, identify three resources per team member.
2. Prepare an annotated bibliography of the resources that you recommend for your topic. For each resource, provide:
   - Complete reference in APA format and retrieval instructions.
   - A paragraph-long summary of the resource. Explain how it goes beyond the study assignments and contributes to increased knowledge about the topic. Why would it be valuable for other learners to review this resource?
   - Conclude with a paragraph describing your significant learning about this topic and questions you have for further research.

Response Guidelines

Review the posts of at least two learners in two topic areas other than the one you researched. Select topics that are new to you. Evaluate the resources in their annotated bibliographies. Comment on the usefulness of these resources to expand your knowledge of each topic. What did you find most interesting about the topic? What questions do you have for further research on the topic?

Course Resources

Graduate Discussion Participation Scoring Guide

APA Style and Format

Annotated Bibliography

u07d2 - Learning Components

- Explore options for performance problem intervention.
- Recognize hierarchy of design elements.

u07d3 - Possible Knowledge and Skill Interventions for Your Project

For this discussion, discuss and describe how a Knowledge and Skill intervention might help address the performance gaps in your organization.

- Use what you have learned in this unit and write a 200–300 word description of a Knowledge and Skill intervention to address a performance gap in your organization. This may be a performance gap you have identified for your project or it may be another performance gap.
- Use this outline to describe a possible Knowledge and Skill intervention:
  - **Intervention title.**
  - **Purpose.**
  - **Target audience.**
  - **Theory.** Describe the theory or conceptual framework that undergirds your design of the intervention. Examples for this unit: Kolb's Experiential Learning Theory, Gagne's Instructional Events.
  - **Description of successful examples from the literature.** Who has implemented a similar intervention? What was the impact on performance?
  - **Timing.** How long will it take to implement the intervention?
  - **Requirements.** What kinds of logistical and other elements are required to make the intervention work?
  - **Design description.** While this is not an implementation plan, you should give a detailed description of the critical elements of the intervention, the sequence or arrangement of these elements, and any other description that will help you or others create supporting material to implement the intervention.

Response Guidelines

Read the experiences of other learners and add them to your reference list of interventions. Respond to at least one learner and focus your comments on the recommendations made for designing powerful learning experiences.

Course Resources

Graduate Discussion Participation Scoring Guide

u07d3 - Learning Components

- Demonstrate knowledge of training interventions.
- Recognize effective training design elements.

Unit 8 >> Proposed Solutions

Introduction

In Units 2 through 7, you explored many different interventions and created your own intervention selection tools. In this unit, you will turn your attention to the performance improvement project that you selected and described in Unit 2.

Select Interventions

Normally you would not have a seven-week gap between defining the performance problem and selecting interventions to resolve the performance gap. It usually takes a few hours to a week to complete this step, depending upon the availability of all the key players. It is important to complete this step in collaboration with your primary client because they will be an invaluable resource for identifying and evaluating critical factors that will influence the intervention choice for the proposed solution. Furthermore, they must be 100 percent behind the recommendations for a successful project.

First, use your own intervention selection tools to help you select interventions for your performance improvement project. Make sure to keep track of all the factors you considered and the thought process you used to make your choices.

Consider many factors in your decision process, such as:

- **Root causes**. The first priority is to select interventions that are likely to address the root cause and close the performance gap. It is quite possible that you will have several interventions that met this criterion. Then some other factors must be considered to make the final selection of interventions. Even if only one intervention seems likely to resolve the problem, these factors should be considered.
- **Logistical constraints and limitations**. All situations have some constraints and limitations such as:
  - Is the content subject to frequent change?
  - Are the employees in one or multiple locations?
  - Does the intervention involve segments of, or the entire organization?
  - Is the intervention needed immediately or is there time for development?
  - Are subject-matter experts readily available?
  - Many other constraints and limitations affect every situation and must be considered when selecting interventions. What are the constraints and limitations for your project?
- **Side effects**. Consider each affected group in turn and imagine how they might receive the intervention. Imagine the intervention in place. How might the situation change? Through visioning or group brainstorming, discern what side effects might result from the intervention and determine if those side effects are acceptable.
- **Estimated cost**. The cost of the intervention is a major consideration. Estimate the cost of the intervention and compare that to possible gain from its implementation. This may be just a rough estimate since it is beyond the scope of this course to address the details of cost estimating. Consider the implications of allowing the gap that you defined in Unit 1 to remain. Is the intervention cost-effective?
- **Priorities**. Since funding is usually limited, it may be necessary to establish priorities for addressing performance gaps and implementing solutions. If your project has more than one performance gap, decide which is most important. If you are planning several interventions, can you afford to implement them all? If not, you may need to phase them in slowly. The Pitera Priority Matrix (Lewis and Van Tiem, 2004) is a useful tool to help establish priorities for intervention implementation.

Gilbert's (2013) Behavioral Engineering Model has an implied priority for selecting interventions. Gilbert suggests that environmental factors—information, resources, and incentives—will have the greatest results. He further suggests that Information interventions are more likely to be successful than Resources interventions, and so on. Gilbert's numbering of the cells indicates the priority order for selecting interventions. Consider these factors as you make a final selection of interventions to resolve your performance problem. Be thoughtful about your choices. This unit is the very heart of the intervention selection process; it deserves careful consideration and attention. You should recommend a minimum of three interventions for your project. Most people will have more.

Rationale

Document your rationale for recommending a particular set of interventions in the Rationale section of your Proposed Solution. This is not only an important part of your grade for this assignment, but an important part of any proposal that you would submit to stakeholders for approval of your recommendations. Include here a discussion of the mental process you used to choose the interventions. Explain the factors you considered and why you feel these interventions are the best solution to the performance problem. If you considered and rejected some other interventions, explain them as

well. If you are dividing the interventions into phases (some postponed for later implementation), indicate that. Include references to theory as appropriate to support your intervention selections. The Rationale section accounts for a major part of your score on this paper; make sure it is well written, well organized, and persuasive.

Intervention Design Specifications

Once you have selected your interventions, provide detailed descriptions of your proposed interventions. These specifications must clearly communicate your expectations to colleagues or external vendors who might be involved in the actual design, development, and implementation of the interventions. Include sufficient detail about the nature and scope of the intervention for someone to estimate the time and cost to develop it. Follow the instructions in the Intervention Solution Proposal course project description to prepare this assignment.

References

Gilbert, T. F. (2013). *Human competence: Engineering worthy performance*. San Francisco, CA: Pfeiffer.

Lewis, J., & Van Tiem, D. (2004). Appreciative inquiry: A view of a glass half full. *Performance Improvement, 43*(8), 19–24.

Learning Activities

u08s1 - Studies

Readings

Use your *Fundamentals of Performance Improvement* text to review the following:

- Chapter 9, "Intervention Selection," pages 195–242.

Use the Capella library to read the following:

- Pershing, J. A. (Ed.). (2006). *Handbook of human performance technology: Principles, practices, and potential* (3rd ed.). San Francisco, CA: Pfeiffer.
  - "Proposed Interventions and Considerations," pages 1268–1271.
- Lewis, J., & Van Tiem, D. (2004). Appreciative inquiry: A view of a glass half full. *Performance Improvement, 43*(8), 19–24.
  - Pay particular attention to the discussion of the Pitera priority matrix. Use this matrix to help you choose interventions for your performance-improvement project. Note the error in Figure 2: "Low impact" should be on the left and "high impact," on the right.

Use the Internet to complete the following:

- IntraHealth International, Inc. (n.d.). Stage 7: Select and design interventions. Retrieved from https://www.intrahealth.org/sst/stage7.html

Multimedia

View the Force Field Analysis animation. This could be a useful when weighing the advantages and disadvantages of each potential intervention you identify.

Optional Readings

Use your *Human Competence* text to read the following:

- Chapter 5, "Troubleshooting Performance," pages 143–170.
  - If you are a teacher, you may find Chapter 8, "Knowledge Policy at School," pages 231–252, interesting and helpful.

u08a1 - Knowledge and Skills Intervention

For this assignment:

1. Select a training intervention that would address a root cause of the performance or that would support the non-training intervention you identified in the Unit 7 assignment.

    - For instance, while your performance problem may not have a root cause in "lack of knowledge and skill," you could create a training program that would support the non-training intervention in the Unit 7 assignment. In that assignment, you might have created a new process for handling paperwork in a department. Workers will probably need training in how to carry out the new process, so you could create a training program that helps workers use the new paperwork process.

2. Use the Knowledge and Skills Intervention template linked in Resources to complete this assignment.
3. Post a draft of your Knowledge and Skills Intervention in the Unit 8 discussion for peer feedback.
4. Incorporate the desired peer feedback. Revise your work and submit in the assignment area.

Course Resources

APA Style and Format

Knowledge and Skills Intervention Template [DOCX]

u08d1 - Post Draft of Knowledge and Skills Intervention

For this discussion:

- Post your draft of your Knowledge and Skills Intervention.

Use the feedback from your instructor and peers to improve your assignment before submitting it for grading.

Response Guidelines

Provide feedback to at least one learner. Use the Knowledge and Skills Intervention Scoring Guide to provide feedback using the required criteria for the assignment.

Course Resources

Graduate Discussion Participation Scoring Guide

u08d1 - Learning Components

- Use proper grammar and punctuation.
- Apply academic writing skills.

u08d2 - Trade-offs and Priorities

For this discussion:

1. Write and post a 200-word essay about making trade-offs and setting priorities when selecting interventions.
2. Include considerations such as budget, time, acceptability, and side effects.
3. Consider the role of the performance consultant as a partner with the stakeholders.

Response Guidelines

Review the posts of at least one other learner and comment about the factors they considered.

Course Resources

Graduate Discussion Participation Scoring Guide

Unit 9 >> Implementation and Evaluation Plan

Introduction

We are in the home stretch now. This unit is about implementation. Suppose you have selected the best suite of interventions for your performance problem; unless they are implemented properly, they will not resolve the performance gap. This unit is a broad-brush overview of change management and project planning—two topics designed to improve the likelihood of successful implementation. Either topic could warrant a course in itself.

Change Management

You must ensure that the interventions are introduced tactfully to all stakeholders and that all logistics for a successful experience are in place. The focus should be on identifying activities critical for project success. Think of these activities as supplemental interventions to help the stakeholders accept the change. Be very specific in your Change Management Plan regarding the steps you will take for each of the stages of the change process. Be sure to include these steps in your Project Management Plan.

Project Management

Every proposal has a project-management plan describing how the project will be managed, which resources will be required, and how long it will take. There are three parts to preparing your Project Management Plan:

- **Work breakdown structure.** For each intervention, think through all the steps required to design, develop, and implement the intervention. List these steps in an outline form.
- **Resources.** What resources will be required to design, develop, and implement each intervention? Will you be using internal talent or contracting with external vendors? What facilities and materials will be needed?
- **Timeline.** What are the major milestones in the design, development, and implementation of your proposed interventions? Prepare a timeline in a Gantt chart format. If you are unfamiliar with Gantt charts, review the optional resources in the study activities.

Be sure to describe how you plan to track progress against your project plan and report status to stakeholders. Remember to plan a celebration for the end of the project!

In the real world, your proposal would also require cost estimates. You certainly need to consider relative costs when selecting interventions. However, the cost section has been omitted from your course assignment to reduce complexity and to avoid distraction from the focus: designing solutions to performance gaps.

Implementation Plan

A template is provided for your Implementation Plan. Be sure to review the Implementation and Evaluation Plan Scoring Guide. Your Implementation Plan should be well-written to assure the key stakeholders that you have thought through all the requirements for a successful implementation.

Evaluation Plan

Your stakeholders will want to know if your intervention has had some positive effect on the performance gaps you identified in Units 1 and 2. Use the levels of evaluation described in the ROI Application Guide for ideas to create a rigorous evaluation plan for your interventions. This plan will allow you to compare the new levels of performance to the baseline you established at the beginning of this course.

Reference

Application Guide: The ROI Methodology in 10 Easy Steps (n.d.). Retrieved from https://www.roiinstitute.net/free-tools/roi-application-guide/

Learning Activities

u09s1 - Studies

Readings

Use your *Fundamentals of Performance Improvement* text to read the following:

- Chapter 21, "Intervention Implementation and Maintenance," pages 475–488.
- "Section 5: Intervention Evaluation," pages 527–569.

Use the Capella library to browse the following:

- Pershing, J. A. (Ed.). (2006). *Handbook of human performance technology: Principles, practices, and potential* (3rd ed.). San Francisco, CA: Pfeiffer.
    - Chapter 12, "Dimensions of Organizational Change," pages 262–286.
    - Chapter 40, "Managing Human Performance Technology Projects," pages 943–963.

Use the Internet to complete the following:

- IntraHealth International. (n.d.). Stage 8: Implement interventions. Retrieved from https://www.intrahealth.org/sst/stage8.html

Optional Readings

If you are unfamiliar with Gantt charts, use the Internet to complete the following:

- Ganttchart.com. (n.d.) Example Gantt charts created with scheduling software. Retrieved from http://www.ganttchart.com/Examples.html
- Smartdraw. (n.d.). How to create a Gantt chart with SmartDraw. Retrieved from https://www.smartdraw.com/gantt-chart/how-to-create-a-gantt-chart.htm

If you are involved in schools, use your *Human Competence* text to read the following:

- Chapter 8, "Knowledge Policy at School," pages 231–252.

Use the Capella library to read the following:

- Phillips, J., & Phillips, P. (2006). Return on investment measures success. *Industrial Management*, *48*(2), 18–23.
    - This article provides an analysis on the increasing demand for evidence of positive returns on investments.

u09a1 - Implementation and Evaluation Plan

For this assignment, you will:

1. Draft the change-management, project-management, and evaluation plans for your Performance Improvement Project:
    - Follow Dormant's "Suggestions to Minimize Resistance" for your change management plan (Van Tiem, Moseley, & Dessinger, 2012, p.70).
    - Follow Andreadis's "Project Life Cycle Processes" (Pershing, 2006, p. 946, linked in Resources) for your project management plan.
2. Use the Implementation and Evaluation Plan template linked in Resources to complete this assignment.
3. Include these elements in your Implementation Plan:
    - **Evaluation Plan.** Identify how you propose to collect evaluation data for the five levels of the Phillips ROI model:
        - Reaction.
        - Learning.
        - Application.
        - Business impact.
        - Return on Investment (You are not expected to do a full ROI analysis in this course. Indicate some of the costs of your interventions, and some of the financial and nonfinancial benefits. You will learn more about doing a formal ROI analysis in ED7675).
    - **Change-Management Plan.** Describe how you will carry out your change-management plan, using Dormant's ideas or another change-management model.
    - **Implementation Plan.** Create a Gantt chart showing the various steps in your project and the deadlines for each step.
4. Post a draft of your Implementation and Evaluation Plan in the Unit 9 discussion for peer feedback.
5. Incorporate the desired peer feedback. Revise your work and submit in the assignment area.

Course Resources

APA Style and Format
Implementation Plan and Evaluation Plan Template [DOC]
Sample Final Project Paper [PDF]
Research Guide - Training & Performance Improvement

Handbook of Human Performance Technology

u09d1 - Post Draft Implementation and Evaluation Plan

For this discussion:

1. Post your implementation plan draft.
2. Discuss and answer the following:
    - Which parts of your plan will be most challenging for you to implement and why?
    - What remaining questions do you have about implementing your interventions?

You may revise your implementation plan based on feedback from your peers before you submit the final version of your assignment.

Response Guidelines

Review the implementation plans of at least two learners and respond with helpful suggestions, encouragement, questions or comments about their plans.

Course Resources

Graduate Discussion Participation Scoring Guide

u09d1 - Learning Components

- Apply academic writing skills.
- Use proper grammar and punctuation.

u09d2 - Planning for Change

For this discussion:

1. Reflect on the concept of planning to facilitate the acceptance of change.
2. Discuss the following in your post:
    - Did this happen often in your past experience? What were the results?
    - What was the most significant thing you learned from the study assignments about change in this unit?
    - Do you have any favorite books or articles about change management to recommend to the other learners? If so, please share the references.

Response Guidelines

Respond to at least one learner. Comment on his or her learning about change management or recommended resources.

Course Resources

Graduate Discussion Participation Scoring Guide

u09d2 - Learning Components

- Analyze performance interventions.
- Compare and contrast change-management strategies.

Unit 10 >> Solution Proposal and Ethics

Introduction

Unit 10 is a time to put all the pieces together and reflect on the intervention selection process. You will have an opportunity to share the Intervention Selection Tools that you developed earlier in the course with other learners.

Ethics

The International Society for Performance Improvement (ISPI) has developed a code of ethics for performance consultants. This code contains items related to intervention selection. In this unit, you will review the ISPI Code of Ethics, browse through two chapters about ethics in your texts, and discuss possible ethical issues.

The ISPI Code of Ethics is based on the following six principles:

1. Add Value.
2. Validated Practice.
3. Collaboration.
4. Continuous Improvement.
5. Integrity.
6. Uphold Confidentiality.

Performance-improvement consultants can encounter ethical challenges in the course of their work. These principles, promoted by leading professional organizations, can guide consultants to make ethical decisions in their work. We will explore this process in this unit.

Reflection

Unit 10 is a time to reflect: on the intervention selection process, what you have learned in this course, and what remaining questions you have. Think about the ethical issues related to intervention selection, the entire human performance technology process, and how intervention selection fits into it. Contemplate the wide variety of interventions available.

Most of all, celebrate! Celebrate what you have accomplished in creating your intervention selection tools and your solution proposal. Celebrate a job well done.

Reference

International Society for Performance Improvement. (n.d.). Code of ethics. Retrieved from http://www.ispi.org/ISPI/Credentials/ISPI_Code_of_Ethics.aspx

Learning Activities

u10s1 - Studies

Readings

Use the Capella library to browse the following:

- Pershing, J. A. (Ed.). (2006). *Handbook of human performance technology: Principles, practices, and potential* (3rd ed.). San Francisco, CA: Pfeiffer.
  - Chapter 44, "Standards and Ethics in Human Performance Technology," pages 1024–1046.
  - Chapter 45, "Professional Ethics," pages 1047–1066.
  - Chapter 49, "Rapid Reflection Throughout the Performance-Improvement Process," pages 1122–1146.

Use the Internet to complete the following:

- International Society for Performance Improvement (ISPI). (n.d.). International Society for Performance Improvement code of ethics. Retrieved from http://www.ispi.org/ISPI/Credentials/ISPI_Code_of_Ethics.aspx
  - Consider bookmarking this site.

u10a1 - Intervention Solution Proposal

During this course, you prepared four papers. Each represents a section of the Intervention Solution Proposal:

- Statement of the Problem (Unit 1).
- Non-Training Intervention (Unit 7).
- Proposed Solution (Unit 8).
- Implementation Plan (Unit 9).

Now you will combine elements of these papers into a formal proposal and add an executive summary. As you will recall, the purpose of this proposal is to promote your recommendations to organizational stakeholders and leadership and convince them to support your solution. Use this opportunity to make sure that stakeholders will be confident that your solution is best and that you will execute this project meticulously. Remember to:

- Direct your proposal to the stakeholders who approve your plan.
- Include sufficient background to provide a comprehensive picture to decision makers.

Instructions

A template is linked in Resources to help you structure your final proposal. There is also a sample final project paper to serve as a model for your project.

Following is a checklist of the required sections of your Solution Proposal. You may wish to review the full course project description in the syllabus as well as the project scoring guide to ensure that you address all project criteria:

- **Executive Summary**: a very brief, concise, and persuasive snapshot of the performance gap, its significance, root causes, and your proposed solution that is comprehensive and can stand on its own.
- **Statement of the Problem:** a statement to ensure that everyone reading the proposal understands the nature and significance of the performance gap you are trying to resolve.
- **Proposed Solution:** a clear description of the recommended interventions with a well-supported rationale.
- **Implementation Plan:** a detailed plan for the successful adoption of the interventions and successful design, development, and implementation of the proposed interventions.

Before submitting this assignment, incorporate the feedback received from your instructor and peers. Refer to the linked Resources to help you complete these final steps as necessary.

Additional Requirements

- **Written communication:** Written communication is free of spelling, grammar, and punctuation errors that detract from the overall message.
- **APA formatting:** Resources and citations are formatted according to current edition APA style and format.
    - Exception: You may use "business style" as described below. You may:
        - Choose to single space rather than double space the body paragraphs.
        - Use numbered and bulleted lists.
        - Use bold type where appropriate.
        - Insert tables and figures in the appropriate positions in the body of the paper.
    - Any deviations from APA format must be done in such a way that they enhance clarity and readability of the proposal by business professionals.
- **Number of resources**: There is no minimum number of resources.
- **Length of paper:** No minimum length of paper. Paper must be typed, double-spaced pages unless using "business style."
- **Font and font size**: Arial, 10 points.

Portfolio Prompt: You are required to save this learning activity to your ePortfolio.

Course Resources
APA Style and Format
Sample Final Project Paper [PDF]
ePortfolio
Research Guide - Training & Performance Improvement
Intervention Solution Proposal Template [DOC]

u10d1 - Ethics

For this discussion:

1. Review the ISPI Code of Ethics (linked in Resources).
2. Identify 1–3 possible ethical challenges you may encounter in carrying out your project.
3. Describe and discuss how you might address each challenge.

Response Guidelines

Respond to at least one learner. Focus your comments on how to recognize and handle ethical issues.

Course Resources

Graduate Discussion Participation Scoring Guide

ISPI Code of Ethics

u10d1 - Learning Components

- Summarize organizational strategies.
- Recommend interventions that align with organizational strategies.

u10d2 - Post Draft of Final Project - Intervention Solution Proposal

For this discussion:

Post a draft of your Intervention Solution Proposal.

Response Guidelines

Respond to at least one other learner. Focus your comments on the usefulness of their intervention selection tools and refer to the final project scoring guide for criteria.

Course Resources

Graduate Discussion Participation Scoring Guide

u10d2 - Learning Components

- Apply academic writing skills.
- Use proper grammar and punctuation.

u10d3 - ePortfolio Confirmation

Continual updating of your ePortfolio is critical to the completion of your degree. 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. You are required to add your final deliverable to your ePortfolio (linked in Resources).

Post a statement to this discussion indicating that you have uploaded your course project to your ePortfolio.

Course Resources

Graduate Discussion Participation Scoring Guide

ePortfolio