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Job Competencies, Career Paths, and Educational Backgrounds
of Fortune 500 Training Directors

A Dissertation
Presented to
the Faculty of the Department of
Educational Leadership and Policy Analysis
East Tennessee State University

In Partial Fulfillment
of the Requirements for the Degree
Doctor of Education

by
Rachael A. Shultz
December 1995

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APPROVAL

This is to certify that the Graduate Committee of

Rachael A. Shultz

met on the

30th day of October, 1995.

The committee read and examined her dissertation, supervised her defense of it in an oral examination, and decided to recommend that her study be submitted to the Graduate Council, in partial fulfillment of the requirements for the degree of Doctor of Education.

W. Hal Knight
Chair, Graduate Committee

Tennor A. Tolleson

Mare Hill

Nancy Disbrow

Signed on behalf of
the Graduate Council

Peggy J. Pantall
Interim Dean, School of
Graduate Studies

ABSTRACT

JOB COMPETENCIES, CAREER PATHS AND EDUCATIONAL BACKGROUNDS OF FORTUNE 500 TRAINING DIRECTORS

by

Rachael A. Shultz

This study examined the job competencies, career paths, and educational backgrounds of training directors and also compared the responses of male and female training directors in an attempt to identify possible sources of justification for reported male/female salary differences.

Data for the study were gathered through the use of two questionnaires. The first was based on a part of the American Society for Training and Development's (ASTD) 1987-1989 Competency and Standards Study. Additionally, a demographic questionnaire dealing with biographical, educational, and professional characteristics was self-developed. Both were mailed to training directors in all Fortune 500 companies.

Major findings include: 1) all of the ASTD competencies received at least a moderately useful rating; 2) many of the training directors had worked in the field of training or in a related business field prior to becoming a training director and over one-fifth had worked in the field of education; 3) a number of undergraduate majors were represented among the training directors, but business was the most popular master's major and education was the most popular doctoral major; 4) 95.8% of the training directors had completed a bachelor's degree, over 70% had some graduate education, 40.6% had completed a master's degree, and 15.2% had completed a doctorate; and 5) statistically significant gender differences were found in the rating of two competencies (intellectual versatility and project management skill), in age, in salaries, in years in training and development, and in years as a training director.

Several recommendations were made. The preparation, selection, and assessment of trainers should be guided by the competencies identified in the survey. Career paths should focus on lower level training positions, human resources development, and education. Students should focus their studies on business, education, and related majors. Trainers should strongly consider pursuing graduate education. Women should be encouraged that gender differences related to job competencies, career paths, and educational backgrounds are slight.

INSTITUTIONAL REVIEW BOARD

This is to certify that the following study has been filed and approved by the Institutional Review Board of East Tennessee State University.

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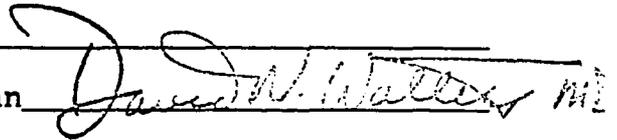
Directors

Principal Investigator: Rachael A. Shultz

Department: Educational Leadership and Policy Analysis

Date Submitted: July 11, 1994

Institutional Review Board, Chairman

A handwritten signature in cursive script, appearing to read "James W. Watson, M.D.", is written over a horizontal line. The signature is written in dark ink and is positioned to the right of the printed text "Institutional Review Board, Chairman".

DEDICATION

**Dedicated to
my parents,
Mary Lloyd Taul Shultz
and
the late Earl Hobson Shultz**

ACKNOWLEDGEMENTS

There are a number of people, in addition to my parents, who have given generously of their time and talents to get me to this point in my program of study, and I would like to mention some of them by name.

First, I would like to express my very deepest gratitude to my doctoral committee chairman, Dr. W. Hal Knight, for his guidance, encouragement, humor, and patience as I have slowly worked my way through this process. I do not know of any professor more dedicated to his students, and I feel very fortunate to have had him as an advisor.

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Dr. Marie S. Hill and Dr. Terry A. Tollefson graciously stepped in to serve on my committee after Dr. Edwards and Dr. Bowers retired, and I appreciate their enthusiasm for my study, as well as their help in completing it.

I would especially like to thank Sharon Barnett, our incomparable departmental secretary, for her friendship, for taking care of so many, many details while I have been in the program, and for helping with my long distance registration from Virginia. I would also like to thank Dr. Melanie G. Narkawicz for sharing her considerable expertise in computerized statistical analysis.

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CHAPTER 1

Introduction

Many studies related to the roles and competencies of trainers in various fields have been conducted since the first study was undertaken in 1948. Initially, these studies focused on the roles and competencies of the adult educator. However, beginning with Nadler and Lippitt's (1967) study of training directors, the focus began to shift more specifically to the roles and competencies of the trainer in business and industry.

An obvious reason exists for the increased interest in identifying the roles and competencies related to corporate training. This corporate field has continued to show growth since the 1980's. In its major 1983 competency study, the American Society for Training and Development noted that 30-40 billion dollars per year were being spent in the United States on employee training (McLagan, 1983). While the recession of the early 1990's took its toll and resulted in leaner corporate budgets in all management areas, Training estimated that budgeted training expenditures would nevertheless reach a record 48.2 billion dollars in 1993, experiencing the biggest rise since 1989 (Training, 1993).

With growing expenditures and greater emphasis on training, the subject of training continues to be of increasing interest and importance to training managers,

practitioners, students, and academics. As a result, training research should be of interest to organization managers who must understand and structure training and development; to training and development managers who need to structure their departments, recruit staff, develop their trainers, and define and design jobs; and to training practitioners who should conduct self-assessment, understand requirements, and plan development activities (McLagan, 1983).

Outside the organization such research and studies such as this one may help aspiring trainers conduct self-assessment, understand requirements, and plan development activities; may help professors plan curricula and give better career counseling; and may also help professional associations focus research, relate to each other, develop their publication policies, plan professional development programs, and lead and define their membership and the field.

Studies such as this one are therefore potentially valuable to organizations including corporations, colleges and universities, and professional associations. These studies are also potentially useful to individuals outside the field of training such as corporate managers, professors, and students, as well as to those already in the profession such as training directors and trainers.

Nadler and Lippitt (1967) and Gossage (1968) studied roles of training directors in the late sixties. Later studies focused on roles and competencies of trainers in general, but not those of the training director in particular.

Roles, competencies, and job descriptions of training directors vary somewhat, but according to McMillan and Walters (1988), a typical training director

Analyzes and determines the training needs of the company and formulates and develops plans, procedures and programs to meet specific training needs and problems. Develops and constructs training manuals and training aids or may supervise their development by outside suppliers. Plans, conducts and coordinates management inventories, appraisals, placement, counseling and training, and coordinates participation in outside training programs by company employees. Typically reports to top organizational development executive or top human resource executive (corporate or own unit (p. 30).

The Problem

Statement of the Problem

The problem of the study was that additional information was needed, since insufficient research had been undertaken in recent years, to identify desirable

competencies, career paths, and educational backgrounds of persons who were in the position of corporate training director. There was a need for this information so that academic departments in higher education institutions might develop better informed curricular planning; so that corporations might better choose persons for such positions; and so that training directors themselves might better conduct self-assessment or plan professional development and advancement.

Subproblem

A subproblem of this study was to compare the job competencies, career paths, and educational backgrounds of male and female training directors in an attempt to identify possible sources of justification for reported male/female salary differences (Thompson, 1990).

Purpose of the Study

The purpose of the study was to provide information about the job competencies, career paths, and educational backgrounds of training directors in order to facilitate their academic preparation, professional development, and career advancement.

Significance of the Study

Corporate training is becoming a more visible and competitive field of human resource management as corporations spend increasing amounts of time and money training and educating their employees. There is an increasing demand for qualified trainers and a call for professional certification. It is therefore important to identify professionally valued competencies, career paths, and educational experiences in order to better serve the profession and better prepare future corporate educational administrators.

Research Questions

The following research questions were formulated:

Q1: Which job competencies are most critical for training directors?

Q2: What career paths are training directors most likely to follow?

Q3: Are there particular undergraduate and graduate subject majors that prepare individuals who become training directors?

Q4: What level of undergraduate or graduate education do training directors typically complete?

Q5: Do the job competencies, career paths, salaries, or educational backgrounds of male and female training directors differ?

Limitations

The limitation of this study was:

The study was limited to training directors of companies listed in the 1993 Fortune 500 Special Report (Fortune, 1993).

Assumptions

1. It was assumed that the Fortune 500 training directors would give thoughtful, honest answers.

2. It was assumed that training directors in the Fortune 500 companies would possess the competencies necessary for success in the training industry.

Definition of Terms

Career Path: A career path was that succession of jobs that has led to the training director's current organizational position.

Educational Background: Educational background referred to the training director's major field of study and level of undergraduate and/or graduate education.

Job Competency: A job competency was a professional skill necessary to the training director's effective job performance, as identified in the ASTD's 1989 competency study.

Training Director: A training director was that person whose professional responsibility is to coordinate the educational activities of the corporation.

Procedures

The procedures involved in undertaking this study began with an identification of the problem. The target population was identified as corporate training directors. Corporate training directors listed in the Fortune 500 group of companies were identified as an experimentally accessible and diverse population. Given the relatively small size of this group, it was decided to study the entire population.

Data for the study of the problem were gathered through the use of the American Society for Training and Development's (ASTD's) 1989 competency study (McLagan, 1989b) and through the use of an additional demographic questionnaire dealing with biographical, educational, and professional characteristics of training directors employed in Fortune 500 companies. The data that were obtained from the survey were subjected to descriptive and correlational analysis. Conclusions were then drawn and recommendations for further study were made.

Organization of the Study

The study was organized and presented in five chapters. Chapter 1 contained an introduction to the study and a

statement of the problem and its purpose, significance, limitations, and assumptions. A list of research questions and definitions was provided. Also included was a description of the procedures and the organization of the study. Chapter 2 contained a review of literature related to the study. Chapter 3 described the procedures and methodology used to perform the study. Chapter 4 presented an analysis of the data and treatment of the results. Chapter 5 included the summary of the findings, conclusions, and recommendations.

CHAPTER 2

Review of Related Literature

A History of Training

Miller, in his seminal history of training, noted that human beings began accumulating knowledge at least as early as the beginning of the Stone Age. With the increase in knowledge and civilization came an increased need for training to perpetuate the newly found skills. Humans had the ability to pass on these new facets of civilization. This was not done with printed instructions, but with examples, signs, and spoken words. Learning took place as knowledge and skills were transferred from one person to another. In these early times, craftsmen and peasants were not literate, and knowledge was transmitted by direct instruction (Miller, 1987).

Over time an apprenticeship system developed. An experienced person passed along skills and knowledge to an unskilled beginner. This system of apprenticeship was not restricted to laborers. It was also employed in religion, the arts, and the military, and was expanded over time to medicine, the law, and other professions. By the middle ages the guild system had spread throughout Europe, establishing standards of quality for products and workmanship (Miller, 1987).

During the nineteenth century industrialization brought changes in work preparation. Specific training was now required for specific tasks, and work activity now focused on a large organization, typically within a large community. During this time, education and schools for business developed as an outgrowth of evening programs that were being offered in business. Training growth accompanied industrial growth. Gradually there developed a true link between education and training. Vocational education developed during the period between the Civil War and World War I (Knowles, 1977).

It was during the late 1800's that large companies began to establish factory schools to train workers. Increased business required an increase in production. Time to train workers by the apprenticeship method vanished, and factory training schools were established to meet the demand. As more companies saw the advantage of this method of training more schools were established, soon becoming commonplace (Miller, 1987).

Training support also came from other sources as the industrial era progressed. Correspondence courses were first offered by the Chautauqua Literary and Scientific Circle in 1882, and the University of Chicago offered the first college-level correspondence courses in 1890. The YMCA was a key influence in the development of training at the turn of this century, offering commercial, industrial,

and scientific courses at its facilities. The concept of cooperative education was introduced at the University of Cincinnati in the early 1900's, giving students opportunities to gain both training and practical experience. By 1900 trade unions were setting up apprenticeship training schools and taking an active role in training, a practice which they still continue today (Knowles, 1977).

By 1910 Ford Motor Company had established the production line concept, in which a bare chassis progressing down a moving assembly line became a finished Model T. This marked the beginning of the production line worker's need for special training for a specific production line job. It was also during this period that World War I brought tremendous growth to training.

A shift toward a broader view of the role of industry in educating its workers began in the 1920's, leading adult educators to assert that there was a steady transformation of industry and its related professions into educational institutions (Knowles, 1977). During the 1920's many colleges and universities responded to the need for managerial personnel by starting business programs. During this time, the practice of managerial apprenticeship faded.

The depression years of the 1930's caused a paradox in the development of American training. During this time many training and apprenticeship programs were eliminated, for

with an abundance of available skilled workers there was no need to train additional labor. On the other hand, training was stimulated by the fact that so many unemployed people had nothing to do. As the problem became more acute, local, state, and federal governments appropriated funds for training (Miller, 1987).

As America prepared to enter World War II, many unskilled workers entered factories to replace the men who had been drafted into the armed forces. With the increase in unskilled labor the training function of the supervisor became paramount, and the title of training director soon became common in the American management hierarchy (Miller, 1987).

It was also during this time that the American Society for Training Directors was formed to meet professional needs of training directors that had become so vital during the war years. The group later became the American Society for Training and Development, and still serves the training profession today (Miller, 1987).

In the two decades following World War II, the number of companies providing education for their employees increased, the subject matter of industrial education broadened, industry began providing facilities designed exclusively for corporate education, and industry developed closer cooperation with educational institutions (Knowles, 1977).

The postwar years were also a time of increasing instructional technology. The launching of the Soviet satellite Sputnik in 1957 further focused the United States' attention on the need for accelerated development of technology. This set the stage for an emphasis on technologically oriented instructional systems (Meierhenry, 1984).

In the early 1970's more trainers were involved in training disadvantaged and hard-core unemployable than at any other time in history. As concerns shifted to minorities as a group, more companies began hiring women and minorities. Much of the training effort in the early 1970's was aimed at preparing these new employees for supervisory positions (Miller, 1987).

A Time of Transition

The field of training and development has undergone tremendous change since the beginning of the 1980's.

No other human resource function has been affected so enormously by change as that of training and development. The complete concept of the function is evolving as T&D [training & development] experts in organizations scramble to keep up with transitions caused by technology, downsizing, and reorganization, national demographics and increased pressures within

organizations to tie training to the bottom line (Ropp, 1987, p. 46).

Interviewing five training specialists from various industries about changes in the field, Ropp (1987) found that training was growing to include problem solving services and that trainers were working more closely with managers to manage performance. He found that technical aspects of training had continued to improve as a result of advancements in technology. Trainers had a growing awareness of the need to develop political skills to market training and development within the organization, and the age of deregulation had brought an increased need for training to comply with new legislation, market innovation, and consolidation.

Hallett (1987) predicted that "the training function could easily be the most exciting and important place to be over the next decade as the changes underway in the economy and the workplace produce greater emphasis on a well-trained work force" (p. 38). He noted that traditional approaches to training and education would not be effective in meeting challenges of an information-based economy, and stressed the need for innovation in the field. He suggested that training should be viewed as an investment rather than as an expense, noting the value of human resources as an organization's most important asset.

Hallett (1987) further predicted that as changes occurred in all aspects of the workplace, continuous learning would be required for employees to compete successfully. With an explosion of information, lifelong learning would characterize the entire educational process, and most of our education and training would occur during the adult years, rather than during the school years. The rapid growth of available information would also require a system of rapid delivery, adding the requirements of flexibility and responsiveness to the training task. As a result, teleconferencing, videotapes, simulations, and computer-aided instruction would become more important to the training process.

Kirrane (1988) echoed this shift, writing that "in the past decade, virtually every organization has felt at least a nudge toward more employee training" (p. 70). Changes in technology, the work force, the organization, customer demand, and the global marketplace all created the need for more training. The move toward an information society required training for technological change. New technologies helped deliver training as well as create the need for it. While training manuals, workbooks, and handouts remained the mainstay of training, they were supplemented with floppy disks, and many training specialists began to expect that artificial intelligence

devices would eventually eliminate the distinction between the place of work and the place of learning (Kirrane, 1988).

In the past five years, instructional methods in corporate training departments have become increasingly more technology-oriented. Commonly accepted training tools listed in Training's 1993 Industry Report were videotapes, simulations, computer-based training, audiotapes, slides, films, interactive video, multimedia, teleconferencing, and computer conferencing (Froiland, 1993b).

Hequet (1991) noted that management of technology offers an opportunity for corporate trainers to play the role of change masters for their businesses but added that training departments face challenges in helping staff manage day-to-day technology issues.

Gordon (1989) stated that lifelong learning is the future of corporate training, driven by the force of accelerating change in the workplace. He added that trainers should think in terms of training, education, and development. Training is a quick-return investment providing immediate results. Education provides a medium-range return, and development pays off further down the road. Traditionally, training has been provided to workers, while education and development have been reserved for managers.

Training activities at all levels of the workplace hierarchy are increasing, however. Froiland (1993b) noted

that there was an increase in total training activities in 1993 over the previous year. The largest increase in training was in the professional job category (41%), followed by training for executives (32%), senior management (30%), office/administrative (29%), supervisors (23%), and production workers (21%).

The growth in training demand is further illustrated by Filipczak (1993), who found that training managers are turning to local adult education systems and community colleges to handle increased instruction their departments cannot do for lack of time or resources.

McLagan (1989a), discussing issues facing human resource development in the 1990's, noted problems associated with a changing work force, predicting that it will be more diverse, with increasing numbers of workers who are functionally illiterate, unable to speak English, multinational, and older than in the past.

The baby boom of the 1940's and 1950's had an impact on training in the 1980's that is continuing into the 1990's. As more workers born during that era have reached middle age in today's workplace, they have found that there is not room for everyone at the top. Training opportunities, rather than promotional opportunities, have been offered as job enrichment to keep these workers challenged and satisfied (Kirrane, 1988).

Paradoxically, the baby bust of the 1960's and 1970's, with its resulting decline in the work force, has also had an impact on training. With young workers to choose from, organizations have used the promise of training as a recruiting tool to attract the brightest people, and also to boost the skills of the more poorly prepared. To compensate for the smaller number of young employees, organizations have hired more middle-aged, older, and handicapped workers. Training has been needed for these new employees and their supervisors (Kirrane, 1988).

Geber (1993) noted the possibility of a training tax that is being considered by the Clinton administration. The proposed tax would force companies to spend 1.5% of their payrolls on training as a direct way to raise the skills of the work force. Although Geber added that the idea is so new that the training community has not yet had time to fully react to it, it is noted that such a tax would legitimize training as a basic element of doing business and would help set a standard that training is important and companies should be expected to do a minimum amount of it.

Kimmerling (1993), noting the President's interest in employee education as an essential business practice of the 1990's, promoted the idea of a chief training officer for corporations, equivalent to an executive in finance or marketing, as a position whose time had come.

According to Linkemer (1987) with increasing visibility, another issue facing trainers is that of credibility. To compete in the corporate world, trainers must learn to think more like business people, and less like trainers. Rather than being policy followers, they must become policy creators.

Clearly, the issue is credibility. If trainers want to play a vital role in the strategic planning process, if they want to be viewed as people with their eyes on the big picture, people who are concerned about the bottom line, people who understand the real business issues facing their companies, some changes must be made. Trainers must tune into business objectives, find ways to meet them, sell the solutions to management, and then show their impact on the bottom line (p. 55).

Increasing Budgets

With increasingly tight budgets, trainers must carefully justify their programs and expenditures, and trainers' salaries are carefully scrutinized. But according to Lee (1988), "When it comes to the value an organization places on its employees, you could do worse than use its training budget as an important measure" (p. 41).

McMillan and Walters (1988), in a study of human resource management pay scales, found that at that time training jobs were lagging in average pay growth. Training

and recruiting tended to lag in compensation increases. Training and recruiting professionals often wore many "hats" within their job descriptions and had considerable variance in their job descriptions. Especially at the professional levels, a fair amount of job rotation existed internally, because positions were often filled depending more on company need than on personal interest.

However, training salaries have begun to rise, as demonstrated by a comparison of Training's annual salary surveys for the years 1990-1993. The 1990 survey reported an 8% rise in salaries over the prior year, but also noted a salary discrepancy between men and women that was growing. Men, on average, made \$53,192, while women, on average, made only \$38,889, a difference of almost 37%. The salary difference had been 34% in 1989, 33% in 1988, and 30% in 1987 (Thompson, 1990).

The salary gains continued as the 1991 survey reported a 5.9% increase over 1990, but also reported that the gap had widened between men and women. Men, on average, earned \$57,066, while women, on average, earned only \$39,843, a difference of over 43% (Lee, 1991).

A brief setback was reported as the recession gripped the economy, and the 1992 survey reported a 3% drop in training salaries over 1991. The gap between men's and women's salaries narrowed, but this was due to the fact that men's salaries decreased, not that women's salaries

increased. Women's salaries actually rose 4% to \$41,567, while men's salaries dropped 6% to \$53,796, a disparity of 29% (Filipczak, 1992).

However, the 1993 salary survey found that salaries had recovered from their previous year's drop, increasing 4% over 1992. The gap between men's and women's salaries continued to narrow. Women's salaries rose 8% to average \$45,015, while men's salaries rose by 2% to average \$55,115. However this still represented a 22% gender discrepancy in pay (Froiland, 1993a).

Training's 1993 Industry Report also noted an increase in trainer salaries from 27 billion dollars in 1988 to 34.9 billion dollars in 1993. For 1993 the biggest area of training budget growth was in the area of trainer salaries. This growth, however, was due to companies hiring more trainers, not necessarily to salary increases. Total training budgets increased from 39.6 billion dollars to 48.2 billion dollars over the same period, while outside expenditures and expenditures for facilities and overhead remained flat (Filipczak, 1993).

Call for Trainer Certification

As the field of training has matured, interest in credentialing professional trainers has been ongoing. In recent years the Society for Human Resource Management (SHRM) (formerly the American Society for Personnel

Administration [ASPA]), American Society for Training and Development (ASTD), and the National Society of Performance and Instruction (NSPI) have all explored the idea (NEEDS CITE). There has been much discussion about who should do the credentialing, and about what form it should take.

Practitioners were polled to gain their opinion on the question of HRD certification. They indicated that certification might be useful during the hiring process and felt that it could help practitioners upgrade their skills and serve as a career planning tool. However they also raised questions about the certification process and about which organization would be in a position to be the certifying agent (Morris, 1993).

Mager and Cram (1985) stated that concepts such as standards, ethics, certification, and licensing are often used as if they mean the same thing, when they do not. To clarify the issue, differences in the four concepts were discussed.

Standards, which describe the competent job performance required of professionals, are useful guides for those who are trying to hire or train those professionals. Standards have an educative function. A code of ethics prescribes professional conduct consistent with a given set of values. A code of ethics often protects clients in circumstances where inappropriate job performance might endanger others. A code of ethics has a judicial, as well as an educative,

function. Certification publicly attests that a given standard of quality has been achieved. Certification serves to grant approval. Licensing has to do with laws which prescribe the means by which one will or will not be allowed to practice a particular craft. Licensing was originally meant to protect the public from incompetent professionals. In many instances it is now used as a means of regulating the number and nature of practitioners. The purpose of licensing is to control (Mager & Cram, 1985).

The level of maturity of training and development has been much discussed. Kenny (1986) described the stages of growth for training as a profession. He stated that the road to professionalism may be demonstrated on a 1-to-6 scale: (1) complete free enterprise or "caveat emptor,"; (2) self-assessment; (3) professional dossier (portfolio) of accomplishments; (4) self-disclosure, including an extensive resume or brochure; (5) professional association membership; and (6) licensure, with a policing body under Provincial/State or Federal law (p. 453).

Kenny added that to better meet client's needs, to fulfill industry needs, and to advance the profession in this decade, the profession must move from the "caveat emptor" state, towards a code of ethics, a common approach or form of professional "self-disclosure" and accreditation of training people. To do so a definition of core competencies of a trainer needs to be agreed upon, and a

system of voluntary individual attestation or accreditation of an individual by training and development/HRD peers needs to be established.

A Training readership survey polled 7,500 subscribers about their opinions on certification. Certification received a positive response, with 77% favoring demonstrated mastery of a body of knowledge, 81.1% favoring demonstrated mastery of a set of skills, and 62.3% agreeing that certification would help the professional image of the trainer (Lee, 1986).

A majority of the respondents who offered ideas for "workable" certification systems had a role in mind for professional groups, primarily ASTD or NSPI.

Suggestions included: Establish standards and exams; base standards on ASTD's 1983 competency study; conduct training and testing in cooperation with colleges and universities; and set standards and evaluate competencies in cooperation with employers (Lee, 1986, p. 62).

While many trainers appeared to favor some sort of credentialing, others did not. Gilley (1986) stated that human resource development did not meet all of the criteria of a profession, did not have an established body of knowledge, skills, or competencies, and did not have a standardized certifying body which tests the proficiency of its members. He further stated that "The field of HRD has

failed to progress systematically through all of the six stages of a profession" (p. 16). He concluded that it might be time for the HRD associations to work together to address this dilemma.

Currently, professional certification for trainers is available through the SHRM, which offers general personnel/human resource management certification as a Professional in Human Resources or a Senior Professional in Human Resources based upon a comprehensive exam covering staffing, labor relations, compensation, training, safety, and management (Wiley, 1992). At this time no accreditation exists specifically for trainers.

Job Competencies of Trainers

Over the years, many studies have been undertaken in an effort to identify the roles and competencies related to training. Generally speaking, these studies initially focused on the broad field of adult education, but became more specifically focused on roles and competencies of corporate trainers as the profession matured. A listing of pertinent studies and their topics is presented in Table 1.

Table 1

Studies of Roles and Competencies Related to Training

Year	Author	Study topic
1948	Hallenbeck	Role of adult educators
1956	Houle	Competencies of adult education students
1961	Chamberlain	Competencies of adult educators
1961	Robinson	Competencies of adult educators
1963	Aker	Competencies of adult educators
1967	Nordlie	Competencies of adult educators
1967	Nadler & Lippitt	Roles of training directors
1968	Gossage	Roles of training directors
1975	Civil Service Commission	Role of federal trainers
1976	Kenny	Core competencies of trainers
1978	Bunning & Rossman	Skills of future adult educators
1978	Pinto & Walker	Roles of trainers
1981	Denden-Parker	Skills of San Francisco trainers
1982	Trimby	Entry level competencies of trainers
1982	Daniel & Rose	Skills of future adult educators
1983	Ishler & Ervay	Skills of trainers
1983	McLagan	Competencies of trainers
1984	Rooze	Competencies of west Texas trainers

(table continues)

Table 1 (continued)

Studies of Roles and Competencies Related to Training

Year	Author	Study Topic
1986	Maddocks & Yelon	Competencies of General Motors trainers
1988	Cameron	Competencies of Tennessee industrial trainers
1988	Suter, Lapp, & Carl	Competencies of nuclear trainers
1989	McLagan	Competencies of human resource developers
1989	Leach	Competencies of business/industrial trainers
1991	Howard & Stout	Competencies valued by senior trainers
1991	Luthy	Competencies of corporate trainers

One of the initial comprehensive studies was that of Hallenbeck in 1948, which examined the role of the adult educator. This study seemed to set the pattern for many in the years that followed, and from the late 1940's until the late 1960's most studies relating to the roles and competencies of training were not geared to corporate training as we think of it today, but rather to the role of the adult educator.

It was not until Nadler and Lippitt (1967) and Gossage (1968) studied the roles of training directors that studies began to appear that related more directly to the roles of

corporate trainers. Nadler and Lippitt (1967) clustered role elements into the three major sub-roles of Learning Specialist, Administrator, and Contributor to Organizational Problem Solving.

Gossage (1968) determined that training directors needed both college-based and job-based competencies. College-based competencies included: (a) the ability to develop and supervise programs, (b) knowledge of educational principles, (c) ability to communicate, (d) knowledge of business principles, and (e) the ability to conduct classes. To gain these competencies required courses in human behavior, instructional methodology, administration, communications, business, and research methods. Competencies to be developed on the job included: (a) policy implementation, (b) developing and supervising programs, (c) determining training needs, (d) conducting training, and (e) maintaining home relations.

Pinto and Walker (1978) undertook a study sampling the membership of the American Society for Training and Development to identify the critical activities trainers performed in their day-to-day role. Similar activities were clustered, and a role model was formed. The sample was from a very heterogeneous population, with respondents from 31 occupational/industry areas providing information about their jobs as trainers and adult educators. Initially more than 1000 job activities were identified that were performed

by trainers. Of those, 92 items were judged to be appropriate for the questionnaire. Using factor analysis, 21 statistical factors were identified, of which 14 were selected as representative of the total data base. The 14 activity clusters were grouped into the four major functional areas of management and coordination, programming, human resource development delivery, and career development.

Trimby (1982), designed a study to identify the most important entry level instructional development competencies required in business and industrial settings. A random sample of members of the Senior Trainers interest group of the American Society for Training and Development (ASTD) ranked a list of instructional development competencies, which were then reported in rank order after computing the means. It was found that certain competencies were consistently ranked higher or lower by the trainers, that interpersonal skills were ranked highest, that trainers and training supervisors differed in their rankings, and that the type and size of the organization and the function of its development unit were not important variables in determining its desired competencies.

From 1981 to 1983 the ASTD's Professional Development Committee undertook a study to produce a detailed and updatable definition of excellence in the training and development field in a form that would be useful to and used

as a standard of professional performance by ASTD, organizations, educational institutions, training and development departments, and individuals practicing or expecting to practice in the training and development field (McCullough, 1987).

One of the major contributions of the 1983 study was the identification of 15 key roles in the training and development field. The roles identified were evaluator, group facilitator, individual development counselor, instructional writer, instructor, manager of training and development, marketer, media specialist, needs analyst, program administrator, program designer, strategist, task analyst, theoretician, and transfer agent. After the roles were identified, 31 critical competencies needed to perform the roles were determined. A matrix was formed by combining the roles and competencies (McLagan, 1983).

Cameron (1988), in a study of Tennessee industrial trainers belonging to local ASTD chapters, including the East Tennessee Chapter, identified seventy-eight training tasks which were clustered and designated as administrative, needs assessment, instructional techniques, materials development, evaluation, or personal/professional development competencies. These trainers expressed a great interest in additional training to increase their training competencies.

A 1989 ASTD-sponsored competency study built and expanded upon the 1983 ASTD study (McLagan, 1989b). Whereas the earlier ASTD study looked only at the field of training, the second study took a broader look at the field of human resource development, which included the field of training. Among other goals, the study was designed to help academic human resource development (HRD) programs prepare graduates to work in business and industry and to determine the competencies, including knowledge, skills, and abilities, that HRD professionals must possess. Eleven functional HRD roles were identified, and thirty-five key competencies necessary to those roles were developed. Thirteen of the 35 key competencies were then identified as the most valuable HRD core competencies. These were clustered as technical, business, interpersonal, and intellectual competencies.

It is interesting to note that Marquardt and Engel (1993) stated that HRD practitioners must also increasingly possess "competencies for a shrinking world," due to international assignments. They identified the five skill areas of cultural flexibility, communications skills, HRD skills, creativity, and self-management of learning as being crucial to success in a global environment.

Career Paths of Trainers

In discussing the field of human resources, Louchheim & Lord (1988) noted that while human resource professionals

help other employees reach their career goals with career counseling and educational opportunities, most companies do not give HR professionals the same nurturing that the human resource (HR) professionals give the rest of the staff. Reporting on a survey given to 792 HR professionals at the American Society for Personnel Administration's 1988 National Conference, the authors noted that most people in the field had selected the human resources career path and desired to remain in the field. The survey found that HR professionals desired training, career counseling, mentors, career path information, and job rotations in order to advance in their own field. However, the survey also found that most employers were not providing these career support activities to their HR employees. The authors reported that "only in the area of training do respondents report that their employers are providing effective support" (Louchheim & Lord, 1988, p. 47). As a result, many HR professionals said that they had taken charge of their own career advancement by participating in professional associations, working on task forces, and taking courses both outside and in company-sponsored programs.

According to Williams (1988), "Within the last few years, search consultants have seen the dynamics of the HR field expand so much that it offers multiple opportunities for upward mobility" (p. 38). He added that successful senior executives usually follow this time line: two or

three years after being hired, the person should have reached an assistant generalist role at a plant; within five to six years the person should be in a personnel manager's position at a larger plant or a regional setting; within six to 10 years the person should be looking at the number one position at a larger plant or regional setting; within the 11-to-15-year point, the person should be in a fairly senior level division HR management role with several generalists and/or specialists reporting to that level; and within 15 to 20 years, but usually around the 18th year, the person should reach a senior level executive position on the corporate board.

In Training's 1985 reader survey, respondents described jobs or careers they pursued before they entered training. The most frequent responses were personnel specialist, technical specialist, and line manager. Twenty percent had come from either a public school or college/university teaching background. Training managers were more likely to come from personnel or sales positions. Looking ahead, most trainers stated that they would like to stay in training. Computer-based training (CBT) was seen as the most promising training career of the future (Lee, 1985).

Training, in its 1993 Industry Report, stated that employer-sponsored training was such a vast enterprise that it has been called the nation's shadow educational system (Training, 1993). There has been much discussion about

whether or not educators can make the career change to training.

Over the years, many teachers have tried to make the switch to training. At one point, a typical entry-level training position in New York City typically drew about 500 applicants, 450 of whom were teachers with no experience in the business world (Cushing, 1980). According to Cushing (1980), "Unfamiliarity with common business practices makes many teacher applicants unattractive candidates" (p. 31). He added that teachers were often not able to work as team members, did not understand how organizations function, and knew very little about the economics of the profit system. On the positive side, they could analyze problems, were sensitive to individual needs, and could structure time well.

Alter (1988) noted that corporate education, with expenditures that rival those of our combined elementary, secondary, and postsecondary schools, might indeed be the marketplace of the future for public and private school educators. She added that competencies, not degrees and years of teaching experience, are the key to bridging the credibility gap that exists between the world of education and business.

Corrigan (1980) described bridging activities for teachers wanting to make the switch to a career in training, and suggested that part-time jobs, friendships, reading, and

volunteer work could help the teacher to gain additional valued experience outside the classroom. He also stressed the importance of a résumé which related to business rather than to the classroom.

Roth (1981) also discussed the teacher transition to business and industry, saying

...it becomes very clear that graduates of traditional teacher education programs (teachers) have considerable difficulty in making the transition into training roles in business and industry. We should not expect those prepared in our traditional programs to step into training roles if they so desire. The data cited earlier which showed that only 7.7% of trainers are education majors, may be a reflection of this difficulty (p. 34).

Weischadle (1984), on the other hand, reported that "Teachers who think they will make excellent trainers in corporations have a near even chance of finding a training manager who agrees with them" (p. 22). He added that teachers with backgrounds in business, science, and mathematics are the preferred candidates for training positions, and that teaching and training are two different functions.

Educational Backgrounds of Trainers

Trainers, in general, tend to be highly educated professionals. Over the past four years, the demographics associated with Training's annual salary surveys seem to indicate that the number of trainers/HRD professionals with no college degree is dropping, while the number with bachelor's or master's degrees is increasing, and the number with doctoral degrees is holding steady. In 1993, nearly half had graduate degrees.

The 1993 salary survey found that of 2,054 respondents, 7% had doctoral degrees, 38% had master's degrees, 39% had bachelor's Degrees, and only 16% had no college degree (Froiland, 1993a). The 1992 salary survey found that of 1,628 respondents, 7% had doctorates, 35% had master's degrees, 39% had bachelor's degrees, and only 20% had no college degree (Filipczak, 1992). The 1991 salary survey found that of 2,037 respondents, 7.5% had doctorates, 32.9% had master's degrees, 40.2% had bachelor's degrees, and 19.4% had no college degree (Lee, 1991). The 1990 salary survey found that of 2,597 respondents, 7.3% had doctorates, 31.8% had master's degrees, 39.9% had bachelor's degrees, and 21.0 had no college degree (Thompson, 1990).

Eaves (1985) found that trainers have typically been prepared in business, psychology, general (public school) education, or have attended one or two "train-the-trainer"

workshops. He also noted that most have graduate degrees or at least some graduate study.

Phillips (1981) proposed that programs designed to prepare trainers should be based upon some accepted conception of the nature and role of the trainer. He noted a need to engage trainers during their schooling in programs that provide for both short-term and long-term skills and knowledge. Such programs should provide participation in all phases of the trainer's work, and should prepare trainers to function as instructional designers, presenters, consultants, and administrators, as well as providing multiple opportunities for interacting with people under both real and simulated conditions.

Wallington (1981) noted that most training and development/instructional development professionals were already familiar with either the area of formal higher education or the area of training and development in the business, industrial sector. While some trainers alternated between those two worlds with some ease and facility, the majority of practitioners in training and development, in human resource development (HRD), and in higher education worked in one area or the other with little crossover. He found, however, that events outside of the field were moving the two areas closer together, and noted that each group needs to better understand the other in order to coordinate efforts to develop the curriculum needed to produce

professional trainers and HRD specialists (Wallington, 1981).

Heinrich (1982) reported that, in a study undertaken for Indiana University, experienced trainers recommended courses in instructional development, product design and development, learning theory, basic communications, evaluation, business theory, and background skills and competencies as the most valuable for preparing future trainers. Areas receiving emphasis in Indiana's school of education, as well as in many other schools around the country, but not professionally valued by the trainers, included research and statistics, educational foundations, measurement and testing, and organizational development.

Palmer (1985), in a study of U.S. programs to prepare training professionals, found no programs offered by the American Assembly of Collegiate Schools of Business (AACSB) accredited schools leading to degrees in education and training. Many schools, however, did offer courses to prepare training specialists. It was noted that such courses were offered by a variety of academic departments, with no consistency from school to school. Palmer found that courses related to training were typically offered by departments of business education, management, personnel, economics, vocational education, secondary education, and adult and continuing education. It was further noted that conflict among departments over the responsibility of

preparing trainers could stem from the variety of competencies required of trainers.

Zemke (1981) stated that graduate education in America "is a mess, at least where advanced degree-seekers in the training and development profession encounter it" (p. 24). Trainers face a dilemma, for while the education system is not always willing to meet the needs of employed adult learners, having an advanced degree in the field of training and HRD does pay. Zemke noted that as a result of this problem graduate correspondence programs were growing, but not always with an eye to quality, adding that such a degree might be worth no more than the paper it was printed on.

According to Geber (1987), HRD degree programs have proliferated in a very short period of time, with an explosion of programs since 1980. Geber noted the existence of over 300 such programs. Of that total, there were 65 undergraduate degree programs, 143 master's degree programs, 55 certificate programs offering more than a master's but less than a doctorate, and 58 Ph.D. programs. According to the author, academic HRD degrees cluster in education, adult education, instructional media, counseling, behavioral sciences, communications, vocational education, and business. Because there is no definition as to the best kind of HRD program, each tends to favor the department where it is housed. Geber added that the increase in

programs should improve professionalism, but would also increase competition among graduates.

Role of the Training Director

Steinburg (1992) stated that trainers have no single role or occupational model. He added that the roles of trainers vary due to varying levels of managerial responsibility, degree of active involvement in organization needs, degree of involvement in training and development, and the degree of training specialization. He states that trainers need to acquire a core of knowledge and skills, and notes that the trainer plays the role of trainer, provider, consultant, innovator, and training manager. Training managers plan, organize, control, and develop the total training function.

Pittam (1987), in discussing the management of the training function, noted that the principles involved in managing a training operation were the same as for any other area of business, adding that the better organized the business was, the easier it would be to organize the training component. According to the author, the training director should collect relevant data that impact the training function, determine the overall purpose of the training function, consider strategies to achieve that purpose, determine the most reasonable approach, determine which results should be measured, sell the approach,

establish policies and procedures, and then track the results and modify the approach accordingly.

According to Gordon (1986), as training has become more visible, training directors have become less isolated, receiving more attention from corporate management. No longer operating in a void, for some directors the increased attention has been a mixed blessing. The training director must become more aware of company politics, and must learn to cooperate with leaders and specialists in other departments if the training program is to be successful. Training must be linked directly to business objectives and used as an enabling process to meet organizational goals. In conclusion, it was noted that building relationships within the organization is key to the training director's success.

Bellman (1988) noted the importance of the staff manager's leadership abilities. He stated that leaders tend to make decisions based on a vision of the future, emphasize intuition, expand beyond given resources, adjust to what is needed at the moment, be subjective and impractical, and emphasize belief and commitment. He noted that leaders face increased risks, but can also earn increased personal and professional rewards.

Using a technique known as the adjective word sort, Jurgensen (1970) was able to compile a list of personality characteristics for training directors. Members of the

Southern Minnesota Chapter of the ASTD were asked to describe a successful training director. The list of most descriptive characteristics included: creative, self-starting, resourceful, productive, self-disciplined, clear-thinking, enthusiastic, well-informed, enterprising, progressive, energetic, and sincere. In comparing training directors with other executives, the trainers were described as more patient, conscientious, good-natured, and tactful. According to the study, training directors do not exhibit the dominance, competitiveness, forcefulness, or courage typical of top-level executives.

In summary, a review of the literature reveals that the field of training has changed dramatically over the years, with the most rapid changes occurring since the beginning of the 1980's. In recent years, training budgets and salaries have been rising, although there continues to be a gender gap in the salaries accorded male and female trainers. As the field has matured, there has been an increased call for professional certification. With this thought in mind, a number of studies have been undertaken to identify the roles and competencies corporate trainers should possess. Early studies generally examined the role of the adult educator, but more recent studies have focused on the skills of corporate trainers, specifically. There has been increased interest the career paths and educational backgrounds of successful trainers, and attempts have been made to develop

college curricula to more effectively educate future trainers. Finally, the literature reveals that training directors must use a variety of skills in their roles as human resource managers.

CHAPTER 3

Methods and Procedures

Design of the Study

This study was designed to collect information on the job competencies, career paths, and educational backgrounds of training directors to guide their professional development, career advancement, and academic preparation.

Instrumentation

Data for the study of the problem were gathered through the use of two questionnaires. The first was developed as part of the American Society for Training and Development's (ASTD's) 1987-1989 Competency and Standards Study (McLagan, 1989b). Additionally, a demographic questionnaire dealing with biographical, educational, and professional characteristics was self-developed. Both were simultaneously mailed to training directors in all Fortune 500 companies.

ASTD, a national training association of about 28,000 current members, has conducted two comprehensive competency studies of training and development professionals since the 1980's. Its 1983 study identified 15 training and development roles, as well as 31 competencies critical to their performance. (McLagan, 1983). In 1987 the ASTD commissioned a new study, called the Competencies and

Standards Study, to build and expand upon the results of the 1983 study (McLagan, 1989b).

The 1987-1989 study expanded from the area of training and development to the more encompassing field of human resource development (HRD), which was defined as "the integrated use of training and development, organization development, and career development to improve individual, group, and organization effectiveness" (McLagan, 1989b, p. 18).

The ASTD study was conducted in four phases. In the first phase, HRD experts expanded on the results of the 1983 study to consider not only training and development roles, but also HRD roles related to organization development and career development. This resulted in a preliminary model. In the second phase, a task force revised the preliminary model and developed a first draft model to ensure comprehensive coverage of the roles and related components. In the third phase, the first draft model was revised using feedback obtained from 705 role experts through the use of a questionnaire. In the fourth, and final phase, the second draft was revised by surveying 473 role experts using a modified questionnaire. Results of the study were released in October 1989 (McLagan, 1989b).

The 1989 study report identified 11 key HRD roles of human resource development professionals, noting that most individuals' jobs would actually be combinations of roles or

parts of roles. These were defined as "roles that individuals in HRD will perform in the future and that encompass the range of responsibilities and functions that define HRD work" (McLagan, 1989b). The 11 HRD roles identified in the 1989 ASTD survey were those of researcher, marketer, organization change agent, needs analyst, program designer, HRD materials developer, instructor/facilitator, individual career development advisor, administrator, evaluator, and HRD manager.

Thirty-five competencies, defined as key areas of knowledge and skill, were eventually identified. In the report, these competencies were grouped into technical, business, interpersonal, and intellectual content categories, and 13 core competencies, which had been identified as important in at least half of the roles, were designated. Roles that had at least 75% of their competencies in common were clustered. The role of administrator did not share enough common competencies to be clustered with any other role (McLagan, 1989b).

The ASTD's questionnaire's validity was developed through a four-phase process. In the first phase, selected experts reviewed the results of the 1983 study. A model of future forces, outputs, quality requirements, competencies, and ethical issues for human resource development roles was developed. In the second phase, the preliminary model was revised to provide a first draft questionnaire with more

complete coverage of the identified roles and clarified components. In the third phase the first draft questionnaire was administered to role experts and revised as a result of their feedback to provide a second draft questionnaire. The final phase, the second draft questionnaire was administered to gather information from role experts. This revised questionnaire was then used to gather information for the survey.

As noted previously, the job of training director, like any other HRD position, is a combination of several of 11 possible HRD roles. Since training directors perform several HRD roles, and since all 35 competencies were potentially useful to at least one of 11 possible HRD roles, for purposes of this study all 35 competencies identified in the 1989 report were included in the questionnaire.

For the purposes of this study, a supplemental demographic survey was developed to gain desired information on the directors' career paths and educational backgrounds. This included questions regarding the respondents' level of formal education, number of years' experience in the training field, jobs leading to the position of training director, teaching experience, and current salary.

Identification of Population

The target population was identified as corporate training directors. Corporate training directors of

companies listed in the Fortune 500 were identified as an experimentally accessible and diverse population. Given the relatively small size of this group, the entire population was surveyed. The Fortune 500 is a list of the 500 largest U.S. industrial corporations that have derived more than 50% of their sales from manufacturing and/or mining (Fortune, 1993). Given the large size of the Fortune 500 companies, it was assumed that they would have formalized training departments with staff members designated as directors.

Data Preparation and Analysis

Data collection began in November 1994, when a survey packet containing a cover letter, the competency questionnaire, and the demographic survey was mailed to Fortune 500 company training directors. Addresses of Fortune 500 companies were obtained from a list included in the Fortune 500 Special Report. The packets were generically addressed to the training director of the company, since names of individual training directors were not available. The address of the corporate headquarters as given in the Fortune 500 report was used. One month after initial mail-out, a follow-up letter and the same survey packet were sent to nonrespondents in an attempt to elicit their participation in the study.

Using the competency questionnaire, training directors were asked to rate the 35 described competencies according

to the level of expertise required by their current position, using a scale of one through six, one being high and six being low. Demographic information was requested using primarily a checklist format, with respondents asked to supply additional individualized information regarding job titles.

The competencies were analyzed using descriptive statistics to determine frequencies and variables. The mean, median, mode, standard deviation, variance, range, and number of responses were calculated for each competency. Competencies necessary to their jobs but not included on the survey, as added by the respondents, were listed.

Frequency tables for all variables other than the competencies were developed. A Kruskal-Wallis Analysis of Variance (ANOVA) was used to compare mean rank of the salary categories for men versus women. Mean ratings of each competency were compared for men and women using t-tests. Frequency tables were developed for men only and women only. A Kruskal-Wallis ANOVA was used to determine if there were significant differences in the ages of male and female training directors. The average number of years in training and development, the average number of years as training directors, and the average number of trainers in the department for men versus women were compared using t-tests. A Kruskal-Wallis ANOVA was used to determine if significant

differences existed between men and women in the highest education attained.

CHAPTER 4

Presentation of Data and Analysis of Findings

Introduction

The purpose of the study was to provide information about the job competencies, career paths, and educational backgrounds of training directors.

The study focused on five research questions:

- Q1: Which job competencies are most critical for training directors?
- Q2: What career paths are training directors most likely to follow?
- Q3: Are there particular undergraduate and graduate subject majors that prepare individuals who become training directors?
- Q4: What level of undergraduate or graduate education do training directors typically complete?
- Q5: Do the job competencies, career paths, salaries, or educational backgrounds of male and female training directors differ?

Two survey instruments were sent simultaneously to the training directors of all Fortune 500 companies. One survey requested information regarding the trainers' most needed job competencies, using the questions in ASTD's 1983 competency survey. The other, a self-developed demographic survey, was designed to gain information regarding gender,

age, education, size of training department, career path, and salary. The data were needed to provide information for the four research questions not related to job competencies. Information was gathered through the use of checklists and by requesting respondents to supply information regarding undergraduate and graduate majors, size of department, and job titles.

An initial mail-out was sent to all training directors followed by a mail-out to nonrespondents one month later in an effort to obtain additional responses. A total of 167 (33.4%) usable surveys were returned from training directors at companies in 33 states and the District of Columbia.

Because of the size of the response rate, the researcher attempted to confirm that respondents were representative of the population. Two characteristics for which population data was available were examined: size of company (using sales ranking) and geographic location.

Response rates for the 500 companies when grouped by sales ranking were: 1-100 ranking (largest companies), 22%; 101-200 ranking, 38%; 201-300 ranking, 36%; 301-400 ranking, 31%; 401-500 ranking (smallest companies), 37%. Although directors at the largest companies had a lower response rate, these overall rates were not significantly different ($\chi^2=5.30$, $df=4$) at the .05 alpha level. The lower response rate might be due in part to the size of the corporate structure and the fact that the surveys were addressed only

to the training director, and not to a named individual. Response rates in four of the other strata were fairly even, with a slightly lower response rate for the second smallest group (301-400 ranking).

States were categorized according to geographic region and the response rates for the four regions were compared. The regions were: Northeast, South, Midwest, and West (see Appendix F for a listing of states by region). Although there was a lower response rate from training directors at companies in the Northeast, the overall differences were not significant ($\chi^2=6.32$, $df=3$) at the .05 alpha level. Regional response rates are presented in Table 2. Overall, the proportion of responses by size of company and geographical region were not significantly different from the population.

Table 2

Response Rates by Region

Region	Response Rate	
	%	n
Northeast	25.29%	44
South	31.00%	31
Midwest	37.79%	65
West	43.75%	28

Characteristics of Respondents

Over two thirds of the training directors who responded to the survey were male (69.7%) and female respondents accounted for the remaining 30.8%.

Men were older than women. Since only age categories were provided, it is not possible to report mean ages, but men were between categories three (age 36-45) and four (age 46-55), while women were between categories two (age 26-35) and three (age 36-45). This difference was statistically significant ($\chi^2=9.58$, $p<.002$).

The largest number of total respondents (42.1%), as well as of males (41.2%) and females (44%) considered separately, were in the 46-55 year-old age range, which was the middle age group. The next highest number of respondents were in the next-younger 36-45 year-old age range. There were 36.8% of the males and 28% of the females in this group.

While the 26-35 year-old age group, which was the youngest range, held the next highest number of respondents with 12.8%, there were many more women than men in this younger age group. There were only 6.1% of the males in this category, but 28% of the females. No women were in the two oldest categories. Approximately 10.4% of the respondents were in the 56-65 year-old age group, all of whom were male. There were only .6% of the respondents were over 66, all of whom were male.

Analysis of Career Paths of Respondents

Research questions two, three, and four dealt mainly with information regarding demographics of the Fortune 500 training directors. For that reason, data related to those questions will be presented first in this chapter, followed by information on differences in data related to job competencies and a comparison of male/female responses contained within the other four research questions.

The study was designed to gather information on the current status of items related to the career paths of the training directors, such as salary, the number of trainers in their departments, the number of years in the field, and the number of years in their current position as training director, as well as information on the respondents' career path history. This information was collected through the demographic survey.

Salary

Over 75% of respondents made less than \$100,000 per year. The largest number, 34%, earned between \$75,001-\$100,000 per year. Only 11.8% earned less than \$50,000, while approximately 20% earned over \$100,000 per year. The salaries of the respondents are presented in Table 3.

Comparisons of mean ranks of salaries were made between men and women based on age categories. Women in the 46-55 age category had statistically significantly lower salaries ($p=.0147$). Salaries of men and women in the other age categories did not differ significantly.

Comparisons of mean ranks for salaries were also made between men and women based on their years of experience in the training field. The numbers reported by respondents were collapsed into two categories, five years or less in the training field, and more than five years in the training field. In both instances women had statistically significantly lower salaries (≤ 5 years, $p=.0112$; $5+$ years, $p=.0296$).

Finally, comparisons of mean ranks for salaries were made between men and women based on their number of years as training directors. There was a statistically significant difference in the salaries of men and women who had five years experience or less as a training director, with women making less ($p=.0010$). There was no statistically significant salary difference between men and women who had more than five years of experience as a training director.

Size of Department

Male respondents tended to work in somewhat larger training departments than did female respondents. The mean number of staff persons in the training department was 14.79

($SD=22.30$). There was no statistically significant difference in the size of men's ($M=15.94$, $SD=22.58$) and women's ($M=12.28$, $SD=21.80$) staffs ($t=.91$, $df=148$).

Table 3

Salary of Respondents

Annual Salary	All Respondents	Men	Women
less than \$50,000	11.8% n=17	3.9% n= 4	26.5% n=13
\$ 50,001-\$ 75,000	33.3% n=51	33.0% n=34	34.7% n=17
\$ 75,001-\$100,000	34.0% n=52	36.9% n=38	28.6% n=14
\$100,001-\$125,000	9.8% n=15	11.7% n=12	6.1% n= 3
\$125,001-\$150,000	8.5% n=13	10.7% n=11	4.1% n= 2
over \$150,000	2.6% n= 4	3.9% n= 4	_____ n= 0

Years in Training

Information was also gathered on the number of years the training directors had spent in the field of training and development or human resource development. In this

area, there was a statistically significant difference at the $\alpha=.05$ level in the means of the male and female respondents ($t=3.31$, $df=159$). The mean for all respondents was 13.05 ($SD=7.94$) years spent in the training field. The mean for men, however, was 14.41 ($SD=8.00$) years, while for women the mean was 10.02 ($SD=6.95$) years.

Years as a Training Director

Information was gathered on the number of years the respondents had spent as training directors. Again, there was a statistically significant difference in the male and female respondents at the $\alpha=.05$ level ($t=3.21$). The mean in this area for all respondents was 6.47 ($SD=5.53$) years spent as a training director. The mean for men was 7.26 ($SD=5.80$) years, while for women it was 4.48 ($SD=4.28$) years.

Career Paths

Information was gathered regarding the career paths of the training directors. This included information about positions leading to the position of training director, as well as information regarding fields the directors had worked in prior to entering HRD, and information regarding teaching experience.

Regarding the position the training director held immediately prior to becoming a training director, the

largest number, 24.7%, had worked in the field of training prior to becoming a training director. Many of the remaining training directors had held a position in a related field, such as human resources (12.3%), organizational development (6.2%), or personnel (6.2%). These numbers did not vary significantly for male and female respondents.

Regarding the second position prior to becoming a training director, the largest number, 18.8%, had again been in training in their second prior job. The other most frequent experience areas were human resources (13%) and sales (5.8%). For women, slightly more had been in human resources in their second prior job position. Again, the numbers did not differ significantly for men and women.

Data was also gathered regarding the field, if any, the training director worked in before entering human resource development. This question was asked to discern which fields might lead to a career as a training director. Over one-fifth of the training directors, 21.1%, had been in the field of education prior to entering the field of human resource development. This number did not vary substantially for men and women. Sales accounted for the next largest number (12.6%), followed by service in the armed forces (6.3%), production (6.3%), and purchasing (5.3%).

Although a number of the respondents had worked in education prior to entering HRD, 72.6% of the respondents had no teaching experience. Of those training directors who did have teaching experience, more had taught at the college level (17.75%), followed closely by those with junior or senior high teaching experience (16.5%). Only 4.9% of the respondents had taught elementary school. These numbers did not differ substantially for men and women, although more men had previous teaching experience than did women (M=29.8% had taught, F=22.4% had taught).

Table 4

Career Paths of Respondents

<u>Training Director</u>				
<u>Immediate Past Position</u> (% holding that position)				
Training	Human Resources	Organizational Development	Personnel	
(24.7%)	(12.3%)	(6.2%)	(6.2%)	
<u>Second Past Position</u> (% holding that position)				
Training	Human Resources		Sales	
(18%)	(13%)		(5.8%)	
<u>Last Position Before Training</u> (% holding that position)				
Education	Sales	Armed Forces	Production	Purchasing
(21.1%)	(2.6%)	(6.3%)	(6.3%)	(5.3%)
M (22.1%)	(14.7%)	(8.8%)	(7.4%)	(0%)
F (18.5%)	(7.4%)	(0%)	(3.7%)	(18.5%)

Analysis of Majors and Level of Education of Respondents

The most popular undergraduate major was business (18%), followed by engineering (11%), education (10%), and psychology (10%). Business was the most common major for male respondents, however business and education tied as the most common majors for female respondents.

The most common graduate majors for training directors who indicated that they had pursued at least some graduate studies were business (38.7%), followed by human resources (12.9%), and lesser numbers in education, engineering, and English. Both male and female respondents listed business as the most commonly-chosen graduate major. For respondents who had completed Masters' and doctoral degrees the most common Masters' major was again business (21.3%), although the most common doctoral major was in education (29.6%).

Virtually all respondents (95.8%) had a college degree. Over 70% of the respondents had attempted at least some graduate education. Many (40.6%) had completed Masters' degrees and 15.2% had doctorates. Highest level of education completed did not differ significantly based on age. There was no statistically significant difference in the level of education for men and women.

Analysis of Competencies as Ranked by Respondents

Each competency was ranked by its computed mean based on responses to the Likert-type scale that allowed a ranking

of 1 (competency not required), 2 (low competency level required), 3 or 4 (moderate competency level required), 5 (high competency level required), or 6 (expert competency level required). Tables are designed to indicate the competency item and its ranking by mean.

No competency received a unanimous 6.00 (expert competency level) rating (see Table 5). The highest-rated competency was presentation skill, which had a mean of 5.45. Additional competencies rated as requiring a high level of competency (above 5.00) included feedback skill (5.28), relationship building skill (5.24), group process skill (5.23), adult learning understanding (5.08), intellectual versatility (5.08), organizational behavior understanding (5.06), and writing skill (5.00).

The lowest-rated competency was records management skill, with a mean of 3.39 (moderate competency level required). It is interesting to note that none of the competencies included on the survey received a total rating of less than a moderate skill level required.

Also included in Table 5 is the competency rating information for male and female respondents. There were statistically significant differences at the $\alpha = .05$ level in the ratings by men and women for only two of the 35 competencies included in the survey. The two competencies were intellectual versatility ($t=2.16$, $df=160$) and project management skill ($t=2.61$, $df=162$). In both instances,

female respondents ranked the two competencies higher than did the male respondents. Women rated intellectual versatility at 5.31 and project management skill at 5.16, whereas the men rated the same competencies at 4.98 and 4.82, respectively.

Table 5
Competencies Ranked by Mean
for All Respondents and by Gender

Competency	All	Men	Women
<u>SD</u>	(n=167)	(n=115)	(n=50)
Presentation Skill	5.45	5.41	5.54
<u>SD</u>	.64	.65	.61
Feedback Skill	5.28	5.24	5.40
<u>SD</u>	.71	.76	.61
Relationship Building Skill	5.24	5.17	5.39
<u>SD</u>	.72	.74	.64
Group Process Skill	5.23	5.29	5.10
<u>SD</u>	.87	.80	1.01
Business Understanding	5.08	5.11	5.02
<u>SD</u>	.65	.65	.66
Intellectual Versatility	5.08	4.98*	5.31*
<u>SD</u>	.88	.89	.85
Organization Behavior Understanding	5.06	5.08	5.04
<u>SD</u>	.92	.91	.94
Writing Skill	5.00	4.93	5.16
<u>SD</u>	.83	.82	.87
Organization Understanding	4.99	5.00	4.96
<u>SD</u>	.88	.89	.89
Self Knowledge	4.95	4.88	5.10
<u>SD</u>	.97	.98	.95
Questioning Skill	4.94	4.96	4.88
<u>SD</u>	.91	.82	1.10
Project Management Skill	4.92	4.82*	5.16*
<u>SD</u>	.79	.82	.68
Adult Learning Understanding	4.92	4.94	4.88
<u>SD</u>	.87	.88	.87
Objectives Preparation Skill	4.91	4.87	5.00
<u>SD</u>	.91	.93	.89
Training & Development Theory /Technical Understanding	4.90	4.86	4.98
<u>SD</u>	1.04	1.07	.98
Competency ID Skill	4.76	4.68	4.96
<u>SD</u>	.98	.98	.96
Futuring Skill	4.76	4.74	4.78
<u>SD</u>	.97	.98	.96

(table continues)

Table 5 (continued)

Competencies Ranked by Mean
for All Respondents and by Gender

Competency	All	Men	Women
<u>SD</u>	(n=167)	(n=115)	(n=50)
Negotiation Skill	4.66	4.59	4.78
<u>SD</u>	.96	.95	.99
OD Theories/Techniques			
Understanding	4.66	4.65	4.69
<u>SD</u>	1.08	1.08	1.12
HRD Field Understanding	4.66	4.65	4.66
<u>SD</u>	1.01	.91	1.22
Industry Understanding	4.59	4.61	4.52
<u>SD</u>	1.01	1.02	1.00
Cost-Benefit Analysis Skill	4.57	4.57	4.50
<u>SD</u>	.96	.93	1.03
Counseling Skill	4.56	4.55	4.58
<u>SD</u>	1.12	1.11	1.62
Performance Observation Skill	4.54	4.54	4.57
<u>SD</u>	1.08	1.05	1.16
Delegation Skill	4.52	4.55	4.42
<u>SD</u>	1.08	1.07	1.09
Data Reduction Skill	4.51	4.45	4.64
<u>SD</u>	1.04	1.08	.94
Model Building Skill	4.44	4.46	4.35
<u>SD</u>	1.04	1.04	1.08
Career Development			
Systems Knowledge	4.42	4.36	4.54
<u>SD</u>	1.06	1.09	.99
Subject Matter Understanding	4.28	4.35	4.12
<u>SD</u>	1.22	1.21	1.27
Computer Competence	4.11	4.00	4.30
<u>SD</u>	1.02	.95	1.48
Facilities Skill	4.05	4.02	4.14
<u>SD</u>	1.16	1.13	1.25
Library Skill	3.87	3.77	4.06
<u>SD</u>	1.19	1.15	1.25
Research Skill	3.75	3.65	3.94
<u>SD</u>	1.09	1.06	1.15
Electronic Systems Skill	3.40	3.31	3.58
<u>SD</u>	1.15	1.12	1.98
Records Management Skill	3.39	3.31	3.48
<u>SD</u>	1.13	1.02	1.30

* Statistically significant differences between male and female respondents at the alpha = .05 level

The mean ratings for the competencies were also compared for respondents from the 100 largest companies and the respondents from the 100 smallest companies using a t -test for independent samples. There were significant differences in the responses of large and small companies on six of the 35 competencies (see Table 6).

Respondents from the largest companies rated three competencies higher. Organization understanding skill had a mean of 5.27 ($t=2.62$, $p=.011$), futuring skill had a mean of 5.09 ($t=2.17$, $p=.035$), and HRD field understanding had a mean of 4.77 ($t=2.02$, $p=.048$).

Respondents from the smallest companies also rated three competencies higher. Competency identification skill had a mean of 5.08 ($t=2.19$, $p=.033$), library skill had a mean of 4.26 ($t=3.59$, $p=.001$), and records management skill had a mean of 3.75 ($t=2.35$, $p=.022$).

In addition to the competencies provided on the survey form, respondents were given the opportunity to add competencies that were not listed, but which they felt were important to the performance of their role as training directors. Forty-one competencies were added, but none received a large number of write-in votes. The competency that was added most frequently was training needs analysis, which was added by eight of the directors (see Appendix D). The fact that no single competency received a large number of write-in votes would indicate that the competencies

included on the survey were those most valued by the directors.

Table 6

Competencies Rated Significantly Differently
by Respondents from Largest and Smallest Companies

Competency	All	Largest	Smallest
SD	(n=167)	(n=24)	(n=37)
Organization Understanding	4.99	5.27*	4.63*
SD	.88	.63	1.22
Competency Identification	4.76	4.55*	5.08*
SD	.98	.91	.91
Futuring Skill	4.76	5.09*	4.51*
SD	.97	.87	1.04
HRD Field Understanding	4.66	4.77*	4.20*
SD	1.01	1.02	1.05
Library Skill	3.87	3.09*	4.26*
SD	1.19	1.23	1.17
Records Management Skill	3.39	2.95*	3.75*
SD	1.13	1.16	1.27

* Statistically significant differences between respondents at the largest and smallest companies at the alpha = .05 level

Analysis of Gender Differences of Respondents

As mentioned previously, there were statistically significant gender-related differences in the rating of only two of the 35 competencies listed on the survey. These two competencies were intellectual versatility and project management skill. There were also statistically significant differences in the number of years the male and female training directors had spent in the field of training or human resource development, as well as the number of years

spent as a training director. There were also statistically significant gender differences found in several salary comparisons based on age, number of years in the training field, and number of years as a training director.

There were not statistically significant gender related differences regarding career path, choice of undergraduate or graduate major, or level of education.

Summary

Data gathered through this study was organized according to the five research questions, related to job competencies, career paths, undergraduate and graduate majors, level of education, and gender differences.

All of the competencies included on the survey were rated as having at least a moderate competency level required. Competencies with a high level of competence required (5.00 rating or above), included presentation skill, feedback skill, relationship building skill, group process skill, adult learning understanding, intellectual versatility, organization behavior understanding, and writing skill.

With regards to career path, most of the respondents had been in the human resource field in their two jobs prior to becoming training directors, and that over one-fifth had worked in the field of education prior to entering human resource development. Most earned less than \$100,000 per

year, had approximately 15 staff members in their training departments, had spent approximately 13 years in the field of training or human resource development, and had spent about six years as a training director.

The most frequently listed undergraduate majors of the respondents were business, engineering, education, and psychology. The most common graduate majors were business, human resources, education, engineering, and English. The most common Master's degree major was business, and the most common doctoral major was education.

Virtually all respondents had a college degree. Seventy percent had at least some graduate education, while approximately 40% had completed a Master's degree and approximately 15% had completed a doctoral degree.

There were several statistically significant differences in the men's and women's responses. Two competencies, intellectual versatility and project management skill, received statistically significantly different ratings. There was also a significant difference in the ages of male and female training directors, as well as in salaries, the number of years men and women had spent in the field of training or human resource development, and the number of years spent as a training director.

CHAPTER 5

Summary, Conclusions, and Recommendations

This chapter is presented in three sections: a summary of the study including the introduction to the problem, statement of the problem, and methods employed; the conclusions for the study as drawn from the findings; and recommendations for use of the results of this study and for conducting future studies.

Summary of the Findings

Since 1948 many studies have been published related to the roles and competencies of trainers in various fields. Initially these studies focused on the roles and competencies of adult educators, but gradually focus shifted to the roles and competencies of trainers in business and industry. This corporate field has continued to show growth since the 1980's, evidenced by record expenditures and a greater emphasis on training (Training, 1993). For this reason the field continues to be of increasing interest and importance to training managers, practitioners, students, and academics.

Within the organization, this research should be of interest to the training managers, as well as to trainers themselves. Outside the organization, such studies may help

students who are aspiring trainers, academicians, and professional associations.

The problem of the study was that more research was needed, since insufficient research had been undertaken in recent years, to identify desirable competencies, career paths, and educational backgrounds for persons interested in attaining or advancing to the position of corporate training director. More information was also needed by academic departments in higher education institutions in order to plan curricula and prepare future training directors, by corporations to make better decisions when choosing persons for such positions, and by individuals for self-assessment, professional development, and advancement. A subproblem of the study was to compare the job competencies, career paths, and educational backgrounds of male and female training directors in an attempt to identify possible reasons for reported male-female salary differences (Froiland, 1993a).

Corporate training is becoming a more visible and competitive field of human resource management, with an increasing demand for qualified trainers. It is therefore important to identify professionally valued competencies, career paths, and educational experiences to better serve the profession and better prepare future corporate educational administrators.

Data for the study was collected using a questionnaire based on the 1983 ASTD competency study as well as a

researcher-developed demographic questionnaire. The questionnaires were sent to the training directors of all Fortune 500 corporations. The competency questionnaire requested that the training directors provide information on 35 competencies found useful in the role of trainer by the 1983 ASTD study. The demographic questionnaire requested information on the trainers' educational backgrounds and career paths. A total of 167 (33.4%) usable surveys were returned.

Findings Related to Job Competencies

None of the competencies listed on the survey received less than a moderately useful rating. This may be due to the extensive field testing undertaken by the ASTD when developing the original survey.

The most highly rated competencies (score of five or above) were presentation skill (5.45), feedback skill (5.28), relationship building skill (5.24), group process skill (5.23), intellectual versatility (5.08), organization behavior understanding (5.06), and writing skill (5.00).

Although the directors were given the opportunity to add additional competencies, no added competency received many responses. The most frequently added competency was "training needs analysis", which was added by eight of the 167 respondents (4.8%). It appeared that the survey already contained the competencies most valued by the directors.

Findings Related to Career Paths

It was found that most of the respondents earned less than \$100,000 per year. The directors had an average of 14.79 staff persons working in their training departments. On average, the trainers had spent 13.05 years working in the training field and had spent 6.47 years in the position of training director. Many had a work history in training or a related field. Over one-fifth had worked in education prior to entering human resource development. Of those directors who had experience in education, most had taught at the college (17.75%) or junior high/high school (16.5%) level.

Findings Related to Majors

A number of undergraduate majors were represented among the directors, but no major was an overwhelming choice. The most popular undergraduate major was business (18%), followed by engineering (11%), education (10%), and psychology (10%). Choices in graduate majors were more definitive. The most popular major among directors who indicated that they had pursued at least some graduate education were business (38.7%), followed by the related field of human resources (12.9%), and lesser numbers in education, engineering, and English. For respondents who had completed a graduate degree, business (21.3%) was the

most popular master's major, while education (29.6%) was the most popular doctoral major.

Findings Related to Level of Education

Virtually all respondents (95.8%) had completed an undergraduate degree. Over 70% had pursued some graduate education. Many (40.6%) had completed masters' degrees and 15.2% had doctorates.

Findings Related to Gender Differences

Independent samples t -tests were used to compare the mean rating of each competency by males and females. Only two competencies, intellectual versatility and project management skill, were found to have a statistically significant difference in ranking, showing that both male and female directors value the same competencies in their jobs.

Demographic data related to research questions two, three, and four was analyzed, and responses by males and females were compared. A Kruskal-Wallis Analysis of Variance (ANOVA) was used to compare mean rank of salaries, ages, and highest education level attained by male and female respondents. Independent samples t -tests compared the average number of years in training, the average number of years as training directors, and the average number of trainers in the training department of male and female

respondents. There were statistically significant differences in the salaries, years in training and development, and years as training director for male and female respondents.

Conclusions

Data from the competency and demographic questionnaires provided information and answers related to five research questions that were the focus of the study.

1. Which job competencies are most critical for training directors? Trainers or others who aspire to a position as a training director should attempt to master the competencies included in this study. All of the competencies were rated as being at least moderately useful by the respondents. No additional competencies received a consensus of support in the write-in section of the questionnaire. The most highly rated competencies identified by the directors related to communication and interpersonal skills within the workplace.

2. What career paths are training directors most likely to follow? Although no specific career path emerged from the study, those who aspire to a role as a training director should gain job experience in the field of training or a related area such as human resources, organizational development, or personnel. Experience in the field of

education would also be useful. A number of the directors had career experience in these areas.

3. Are there particular undergraduate and graduate subject majors that prepare individuals who become training directors? Choice of undergraduate major did not appear to play a major role in becoming a training director. However, graduate work in business and human resource management related fields or education would appear to be useful to those having the position of training director as a career goal.

4. What level of undergraduate or graduate education do training directors typically complete? The study would indicate that an undergraduate degree is a virtual necessity. Many of the directors had also completed graduate work. Highest education level achieved did not differ across age or gender categories.

5. Do the job competencies, career paths, salaries, or educational backgrounds of male and female training directors differ? The study indicates that gender differences related to competencies are slight. Gender-based salary comparisons based on age, years in training, and years as a training director provided mixed results, but in each case where a statistically significant salary difference was found, women made less. Gender differences related to job competencies, career paths, and educational

backgrounds do not appear to be an issue for those considering a position as a training director.

Recommendations

On the basis of the conclusions of this study, the following recommendations are made:

1. Preparation, selection, and assessment of trainers should be guided by the survey competencies. Particular emphasis should be given to presentation skills, feedback skills, relationship building skills, group process skills, intellectual versatility, organization behavior understanding, and writing skills, since these competencies were ranked highest in importance.

2. Those persons desiring to become training directors should focus their career choices on lower level training positions, human resource development positions, and education. These were the paths most frequently demonstrated by the respondents.

3. Students intending to enter the field of training in general, and hoping to attain higher level training positions in particular, should focus their studies on business and business related majors, or on majors such as education or psychology that have a strong emphasis on human behavior and the development of interpersonal skills, since these are the majors and skills evidenced by the directors

in this study. Institutions hoping to prepare students to compete in this area should plan curricula that incorporate studies in these areas. Professional associations should emphasize professional development in these areas.

4. Persons hoping to progress in the field of training should strongly consider pursuing graduate education in the fields noted above. Institutions offering programs related to training should provide graduate, as well as undergraduate, majors in these subject areas, since over half of the training directors possessed advanced degrees.

5. Women contemplating entering the field of training should be encouraged that gender differences related to job competencies, career paths, and educational backgrounds are slight. Salary comparisons indicate that there are not significant gender-based salary differences among younger trainers or among trainers with more experience as training directors.

6. Future studies in this area should determine if the salary differences narrow where there were gender differences based on age, years in the field, and years as a training director.

7. The telephone costs associated with obtaining names of the directors was considered prohibitive and surveys were not addressed to a specific person. However, the response rates for future studies might be increased if the surveys

were addressed by name to the training directors or to the president of the company.

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APPENDICES

APPENDIX A
LIST OF FORTUNE 500 COMPANIES

LIST OF FORTUNE 500 COMPANIES

Abbott Laboratories
Abex
Advanced Micro Devices
Ag Processing
Agway
Air Products & Chemicals
Alberto-Culver
Allegheny Ludlum
Allergan
Alliant Techsystems
Allied-Signal
Aluminum Co. of America
Amax
Amdahl
Amerada Hess
American Brands
American Cyanamid
American Greetings
American Home Products
American Standard
Ametex
Amgen
Am International
Amoco
Amoskeag
AMP
Amsted Industries
Anacomp
Anchor Glass Container
Anheuser-Busch
Apple Computer
Applied Materials
Arcadian
Archer Daniels Midland
Armco
Armstrong World Industries
Arvin Industries
Asarco
Ashland Oil
Ast Research
Atlantic Richfield
Avery Dennison
Avondale Industries
Avon Products

Baker Hughes
Ball
Bandag
Banta

Bard (C.R.)
Baroid
BASF
Bausch & Lomb
Baxter International
Beckman Instruments
Becton Dickinson
Bemis
Berkshire Hathaway
Bethlehem Steel
Betz Laboratories
Black & Decker
Block Drug
Blount
Boeing
Boise Cascade
Borden
Bowater
Briggs & Stratton
Bristol-Myers Squibb
Brooke Group
Brown-Forman
Brunswick
Burlington Industry Equity
Burlington Resources

Cabot
Campbell Soup
Carlisle
Carpenter (E.R.)
Carter-Wallace
Caterpillar
Central Soya
CF Industries
Champion International
Chesapeake
Chevron
Chiquita Brands International
Chrysler
Cincinnati Milacron
Citgo Petroleum
Clark Equipment
Clark Oil & Refining
Clorox
Coastal
Coca-Cola
Coca-Cola Bottling Consolidated
Coca-Cola Enterprises
Colgate-Palmolive
Collins & Aikman Group
Coltec Industries
Commerce Clearing House

Compaq Computer
Conagra
Cone Mills
Conner Peripherals
Consolidated Papers
Cooper Industries
Cooper Tire & Rubber
Coors (Adolph)
Corning
CPC International
Crane
Cray Research
Crown Central Petroleum
Crown Cork & Seal
Crystal Brands
Cummins Engine
Cyprus Minerals

Dana
Danaher
Data General
Dean Foods
Deere
Dell Computer
Del Monte Foods
Delta Woodside Industries
Deluxe
Dexter
Diamond Shamrock
Dibrell Brothers
Digital Equipment
Donnelly (R.R.) & Sons
Dorskocil
Dover
Dow Chemical
Dow Corning
Dow Jones
Dresser Industries
Dresser-Rand
Dr. Pepper/Seven-Up
Du Pont (E.I.) De Nemours
Duracell International
DWG

Eagle Picher Industries
Eastman Kodak
Eaton
Echlin
Ecolab
EG&G
Emerson Electric
Engelhard

Essex Group
E-Systems
Ethyl
Exide
Exxon

Farmers Union (CENEX)
Farmland Industries
Federal-Mogul
Federal Paper Board
Ferro
Figgie International
Fina
First Brands
Fisher-Price
Fleetwood Enterprises
Flowers Industries
FMC
Ford Motor
Fort Howard
Freeport-McMoran
Fruit of the Loom
Fuller

GAF
Gannett
Gateway 2000
Gaylord Container
Gencorp
General Dynamics
General Electric
General Instrument
General Mills
General Motors
General Signal
Georgia Gulf
Georgia-Pacific
Gerber Products
Giddings & Lewis
Gillette
Gitano Group
Gold Kist
Goodrich (B.F.)
Goodyear Tire & Rubber
Grace
Great American Management & Investment
Great Lakes Chemical
Grumman
Guilford Mills

Hanna (M.A.)
Hanson Industries NA
Harley-Davidson
Harman International Industries
Harnischfeger Industries
Harris
Harsco
Hartmarx
Hasbro
Heinz
Helene Curtis Industries
Hercules
Hershey Foods
Hewlett-Packard
Hillenbrand Industries
Hoechst Celanese
Holnam
Homestake Mining
Honeywell
HON Industries
Hormel (Geo. A.)
Hubbell
Huber (J.M.)
Hudson Foods
Huffy

IBP
Illinois Tool Works
Imcera Group
IMC Fertilizer Group
IMO Industries
Imperial Holly
Ingersoll-Rand
Inland Steel Industries
Insilco
Intel
Interco
Interface
Intergraph
Interlake
International Business Machines
International Controls
International Flavors & Fragrances
International Multifoods
International Paper
Interstate Bakeries
ITT Rayonier

James River Corporation of Virginia
Jefferson Smurfit
Johnson Controls
Johnson & Johnson

Jostens
Joy Technologies
JPS Textile Group

Kaman
Kellogg
Kellwood
Kendall International
Kennametal
Kerr-McGee
Kimball International
Kimberly Clark
Knight-Ridder
K-III Communications

LaFarge
Land O'Lakes
La-Z-Boy Chair
Lear Holdings
Leggett & Platt
Leslie Fay
Lilly (Eli)
Lincoln Electric
Litton Industries
Lockheed
Loctite
Longview Fibre
Loral
Louisiana Land & Exploration
Louisiana-Pacific
LSI Logic
LTV
Lubrizol
Lukens
Lyondell Petrochemical

Magma Copper
Magnetex
Manville
Mapco
Mark IV Industries
Martin Marietta
Mary Kay Cosmetics
Masco
Masco Industries
Mattel
Maxtor
Maxus Energy
Maxxam
Maytag
McCormick
McDermott

McDonnell Douglas
McGraw-Hill
Mead
Medtronic
Merck
Meredith
Mid-America Dairymen
Miles
Miller (Herman)
Millipore
Minnesota Mining & Manufacturing
Mitchell Energy & Development
Mobil
Molex
Monsanto
Morton International
Motorola
Murphy Oil

Nacco Industries
Nalco Chemical
National Cooperative Refinery Association
National Semiconductor
National Service Industries
National Steel
Navistar International
NCH
Nerco
Newell
Newmont Mining
New York Times
NL Industries
Nortex
North American Philips
Northrop
Nucor

Occidental Petroleum
Ocean Spray Industries
Olin
Oryx Energy
Oshkosh Truck
Outboard Marine
Owens-Corning Fiberglass
Owens-Illinois

Paccar
Pall
Parker Hannifin
Pennzoil
Pentair
Pepsico

Perkin-Elmer
Pet
Pfizer
Phelps Dodge
Philip Morris
Phillips Petroleum
Pilgrim's Pride
Pitney Bowes
Pittway
Ply Gem
Polaroid
Potlatch
PPG Industries
Prairie Farms Dairy
Premark International
Procter & Gamble

Quaker Oats
Quaker State
Quantum
Quantum Chemical

Ralson Purina
Raychem
Ratheon
Reader's Digest Association
Reliance Electric
Reynolds Metals
Reynolds & Reynolds
Rhone-Poulenc Rorer
Riceland Foods
RJR Nabisco Holdings
Rockwell International
Rohm & Haas
Rohr
Rubbermaid
Russell

Safety-Kleen
Sara Lee
Savannah Foods & Industries
Scherring-Plough
Schulman (A.)
SCI Systems
Scott Paper
Scripps (E.W.)
Seaboard
Seagate Technology
Seagram (J.E.)
Sealy
Sequa
Shaw Industries

Shell Oil
Sherwin-Williams
Sigma-Aldrich
Silgan
Silicon Graphics
Smith (A.O.)
Smithfield Foods
Snap-On Tools
Sonoco Products
Specialty Coatings International
Springs Industries
SPX
Standard Commercial
Standard Products
Standard Register
Stanhope
Stanley Works
Stewart & Stevenson
St. Joe Paper
Stone Container
Storage Technology
Strauss (Levi) & Associates
Sun
Sunbeam/Oster
Sun-Diamond Growers
Sunstrand
Sun Microsystems

Tambrands
Tandem Computers
Tecumseh Products
Tektronix
Teledyne
Temple-Inland
Tenneco
Terex
Tesoro Petroleum
Texaco
Texas Industries
Texas Instruments
Textron
Thermo Electron
Thiokol
Thomas & Betts
Thorn Apple Valley
Times Mirror
Timken
Toro
Tosco
Total Petroleum
Tribune
Trinity Industries

Trinova
Tri Valley Growers
TRW
Tyco Laboratories
Tyco Toys
Tyson Foods

UCC Investors Holding
UIS
Ultramar
Unifi
Unilever U.S.
Union Camp
Union Carbide
Union Texas Petroleum
Unisys
United States Surgical
United Technologies
Universal
Universal Foods
Unocal
Upjohn
USG
UST
USX

Valassis Communications
Valero Energy
Valhi
Valspar
Varian Associates
Varity
VF
Vigoro
Vishay Intertechnology
Vulcan Materials

Walter Industries
Wang Laboratories
Warnaco Group
Warner-Lambert
Washington Post
Weirton Steel
Wellman
Western Digital
Westinghouse Electric
West Point-Pepperell
Westvaco
Weyerhaeuser
Wheeling-Pittsburgh
Whirlpool
Whitman

Willamette Industries
Witco
Worthington Industries
Wrigley (Wm. Jr.)

Xerox

York International

Zenith Electronics

APPENDIX B
SAMPLE LETTER TO FORTUNE 500 TRAINING DIRECTORS

October 8, 1994

Ladies and Gentlemen:

East Tennessee State University, College of Education, is further developing its course of study for masters and doctoral degree students in the field of private sector educational administration. Because of the tremendous interest and encouragement from the private corporate sector relative to such programs, we believe it very important that curricula be prepared with your direct input.

The enclosed survey is endorsed by the Department of Educational Leadership and Policy Analysis for determining the most essential skills and abilities necessary for practitioner competence in the training and development field. The results will have a direct bearing on the content and nature of future postgraduate course offerings.

We consider this an important undertaking and sincerely request that you take approximately 30 minutes of your time to complete the enclosed questionnaire. Responses will be completely anonymous. The survey has been coded only for purposes of contacting non-respondents. All of those responding to the questionnaire will receive an executive summary of the study once it is complete.

Your cooperation is greatly appreciated, and the impact on the graduate program will be invaluable.

Sincerely,

W. Hal Knight, Ph.D.
Professor
Educational Leadership and Policy Analysis

Rachael A. Shultz
Doctoral Student
Educational Leadership and Policy Analysis

APPENDIX C
SURVEY INSTRUMENT

COMPETENCY SURVEY*

Rate the following competencies according to the level of expertise required by your current position. Use the following numerical scale.

- 1 = competency not required
 2 = low competency level required
 3-4 = moderate competency level required
 5 = high competency level required
 6 = expert competency level required

1. Adult Learning Understanding

Knowing how adults acquire and use knowledge, skills, and attitudes. Understanding individual differences in learning.

1 2 3 4 5 6

2. Business Understanding

Knowing how the functions of a business work and relate to each other; knowing the economic impact of business decisions.

1 2 3 4 5 6

3. Career Development Systems Knowledge

Understanding the personal, organizational, and external issues and practices relevant to individual careers and to organizational career systems.

1 2 3 4 5 6

4. Competency Identification Skill

Identifying the knowledge and skill requirements of jobs, tasks, and roles.

1 2 3 4 5 6

5. Computer Competence

Understanding and being able to use computers.

1 2 3 4 5 6

6. Cost-Benefit Analysis Skill
Assessing alternatives in terms of their financial, psychological, and strategic advantages and disadvantages.
- 1 2 3 4 5 6
7. Counseling Skill
Helping individuals recognize and understand personal needs, values, problems, alternatives, and goals.
- 1 2 3 4 5 6
8. Data Reduction Skill
Scanning, synthesizing, and drawing conclusions from data.
- 1 2 3 4 5 6
9. Delegation Skill
Assigning task responsibility and authority to others.
- 1 2 3 4 5 6
10. Electronic Systems Skill
Selecting and using electronic system hardware and software.
- 1 2 3 4 5 6
11. Facilities Skill
Planning and coordinating logistics in an efficient and cost-effective manner.
- 1 2 3 4 5 6
12. Feedback Skill
Communicating information, opinions, observations, and conclusions so that they are understood and can be acted upon.
- 1 2 3 4 5 6
13. Futuring Skill
Projecting trends and visualizing possible and probable futures and their implications.
- 1 2 3 4 5 6

14. Group Process Skill
Influencing groups to both accomplish tasks and fulfill the needs of their members.
- 1 2 3 4 5 6
15. HRD Field Understanding
Knowing the technological, social, economic, professional, and regulatory issues in the field; understanding the role HRD plays in helping individuals and organizations learn and change.
- 1 2 3 4 5 6
16. Industry Understanding
Knowing the key concepts and variables that define an industry or sector (e.g. critical issues, economic vulnerabilities, measurements, distribution channels, inputs, outputs, and information sources).
- 1 2 3 4 5 6
17. Intellectual Versatility
Recognizing, exploring, and using a broad range of ideas and practices; thinking logically and creatively without undue influences from personal biases.
- 1 2 3 4 5 6
18. Library Skill
Gathering information from printed and other recorded sources; identifying and using information specialists and reference services and aids.
- 1 2 3 4 5 6
19. Model Building Skill
Conceptualizing and developing theoretical and practical frameworks that describe complex ideas in understandable, usable ways.
- 1 2 3 4 5 6
20. Negotiation Skill
Securing win-win agreements while successfully representing a special interest in a decision situation.
- 1 2 3 4 5 6

21. Objectives Preparation Skill
 Preparing clear statements that describe desired outputs.
- 1 2 3 4 5 6
22. Organization Behavior Understanding
 Seeing organizations as dynamic political, economic, and social systems that have multiple goals; using this larger perspective as a framework for understanding and influencing events and change.
- 1 2 3 4 5 6
23. Organization Development Theories and Techniques Understanding
 Knowing the techniques and methods used in organization development; understanding their appropriate uses.
- 1 2 3 4 5 6
24. Organization Understanding
 Knowing the strategy, structure, power networks, financial position, and systems of a specific organization.
- 1 2 3 4 5 6
25. Performance Observation Skill
 Tracking and describing behaviors and their effects.
- 1 2 3 4 5 6
26. Presentation Skill
 Verbally presenting information such that the intended purpose is achieved.
- 1 2 3 4 5 6
27. Project Management Skill
 Planning, organizing, and monitoring work.
- 1 2 3 4 5 6

28. Questioning Skill
Gathering information from stimulating insight in individuals and groups through use of interviews, questionnaires, and other probing methods.
- 1 2 3 4 5 6
29. Records Management Skill
Storing data in an easily retrievable form.
- 1 2 3 4 5 6
30. Relationship Building Skill
Adjusting behavior in order to establish relationships and networks across a broad range of people and groups.
- 1 2 3 4 5 6
31. Research Skill
Selecting, developing, and using methodologies, statistical, and data collection techniques for formal inquiry.
- 1 2 3 4 5 6
32. Self-Knowledge
Knowing one's personal values, needs, interests, style, and competencies and their effects on others.
- 1 2 3 4 5 6
33. Subject Matter Understanding
Knowing the technical content of a given function or discipline.
- 1 2 3 4 5 6
34. Training and Development Theories and Techniques Understanding
Knowing the theories and methods used in training; understanding their appropriate uses.
- 1 2 3 4 5 6

35. Writing Skill

Preparing written material that follows generally accepted rules of style and form, is appropriate for the audience, is creative, and accomplishes its intended purposes.

1 2 3 4 5 6

36. Other Competencies (specify)

1 2 3 4 5 6

37. Other Competencies (specify)

1 2 3 4 5 6

38. Other Competencies (specify)

1 2 3 4 5 6

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DEMOGRAPHIC QUESTIONNAIRE

Please complete the items below:

1. _____ Female

_____ Male

2. Age

_____ 25 or under

_____ 26-35

_____ 36-45

_____ 46-55

_____ 56-65

_____ 66 or over

3. What level of formal education have you completed? If you have received more than one degree, provide information on each.

_____ no college degree

_____ B.A. or B.S.

Major: _____

_____ some graduate work

Major: _____

_____ M.A. or M.S.

Major: _____

_____ Ph.D. or Ed.D.

Major: _____

4. How long have you been in the Training and Development and/or Human Resources field? _____ years

5. How long have you been a training director?
_____ years
6. Approximately how many trainers are employed in your corporation's training department(s)? _____
7. What was the title of the last position you held before becoming a training director?

8. What was the title of the last position you held before #7 (above)?

9. What was the job title of the last position you held before entering the field of HRD, if any?

10. Have you ever taught full-time in a public or private school?
_____ no
_____ yes, Elementary School, grades K-6
_____ yes, Junior/Senior High School, grades 7-12
_____ yes, College or University

11. What is your current annual salary range?

_____ less than \$50,000

_____ \$50,001-\$75,000

_____ \$75,001-\$100,000

_____ \$100,001-\$125,000

_____ \$125,001-\$150,000

_____ over \$150,000

APPENDIX D
COMPETENCIES ADDED BY RESPONDENTS

COMPETENCIES ADDED BY RESPONDENTS

Number of Responses	Competency
8	training needs analysis
6	flexibility/change, outside resources
5	management ability, program design skills, TQM
4	influential, performance management, small group dynamics
3	caring, confrontational ability, consultation skills, evaluation skills, imagination, instructor skills, mentally tough, staff development skills,
2	even temperament, group facilitator, motivational skills, organizational skills, risk taker, sense of humor
1	communication skills, customer service, experimental learning, good listener, hard, fast, energetic, learning facilitator, multicultural skills, needs analysis, personnel objectives, politically astute, self-directed learning, self-improvement, social skills, strategic planning, testing skills

APPENDIX E
SAMPLE LETTER TO RESPONDENTS

December 15, 1995

Ladies and Gentlemen:

During the Fall, 1994 you participated in a doctoral study through the College of Education at East Tennessee State University. The study was intended to gather information on the essential skills and abilities necessary for practitioner competence in the training and development field, and was endorsed by the Department of Educational Leadership and Policy Analysis for purposes of curricula development. Participants were promised an executive summary of the study once it was complete.

We would like to take this opportunity to thank you for participating in the study. We gained invaluable information regarding the job competencies, career paths, and educational backgrounds of Fortune 500 training directors that will have a direct bearing on the content and nature of future postgraduate course offerings.

Enclosed you will find an executive summary of the study. While we have no way of identifying participants by name, if you have any questions or concerns regarding the study, please contact the student through this department. Data regarding the study will be kept on file for a period of ten years. A copy of the complete study will be available through the university's Sherrod Library.

Thank you again for your participation.

Sincerely,

W. Hal Knight, Ph.D.
Professor
Educational Leadership and Policy Analysis

Rachael A. Shultz
Doctoral Student
Educational Leadership and Policy Analysis

APPENDIX F
LIST OF STATES BY REGION

LIST OF STATES BY REGION

Northeast

Connecticut
Delaware
District of Columbia
Maryland
Massachusetts
New Hampshire
New Jersey
New York
Pennsylvania
Rhode Island

South

Alabama
Arkansas
Florida
Georgia
Kentucky
Louisiana
North Carolina
Oklahoma
South Carolina
Tennessee
Texas
Virginia
West Virginia

Midwest

Illinois
Indiana
Iowa
Kansas
Michigan
Minnesota
Missouri
Nebraska
Ohio
Wisconsin

West

Arizona
California
Colorado
Idaho
Oregon
South Dakota
Utah
Washington

VITA

RACHAEL A. SHULTZ

- Education:** East Tennessee State University, Johnson City, Educational Leadership & Policy Analysis, Ed.D., 1995
- East Texas State University, Commerce; Educational Media & Technology, 1979-1981
- East Tennessee State University, Johnson City; Instructional Communication, M.A., 1979
- University of Tennessee, Knoxville; Elementary Education, Library Science, B.S., 1976
- Experience:** Program Specialist, Student Financial Assistance Programs, U.S. Department of Education, Washington, DC, 1994-present
- Education Program Specialist, Compensatory Education Programs, U.S. Department of Education, Washington, DC, 1990-1994
- School Assistance Specialist, Impact Aid Programs U.S. Department of Education, Washington, DC, 1989-1990
- Doctoral Fellow, College of Education, East Tennessee State University, Johnson City, 1986-1988
- Library Media Specialist, Johnson City Schools, Johnson City, Tennessee, 1985-1986
- Library Media Specialist, Hawkins County Schools, Rogersville, Tennessee, 1983-1985
- Assistant Instructor, College of Education, East Texas State University, Commerce, 1979-1981
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