

## **A Comparative Analysis of Training and Development and Work-Family Education Systems in a Large Corporate Organization**

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*This paper reviews the findings of a comparative analysis of two education systems in one corporate organization: training and development and work-family. Key learning features across these systems were analyzed to determine similarities and differences and to identify common concerns. The findings indicated that, although this organization invests considerable resources in both systems, organizational cultural constraints inhibit the effective provision of resources. Implications for HRD professionals working with education systems in organizations are explored.*

Keywords: work-life issues, training and development, organizational culture

In a newsletter of Cybex\*, a large services company, the following two articles were featured. The first described that Cybex had received a prestigious award at a national work-family event held in Washington, DC. In accepting the award, Cybex's Vice President responsible for diversity applauded the courage and conviction of Cybex's employees who had put work-family issues on the table and helped to create solutions that worked for both the organization and the family. In the same newsletter, a second article identified Cybex's training and development initiatives and described that a new executive role had been created in the organization, which included the responsibilities of executive development, leadership effectiveness and employee training opportunities, as well as the implementation of best training and learning practices across the company. The selection of a key executive to head up this area emphasized the priority of training and development in this corporation.

The newsletter articles indicated that these two education systems—training and development and work-family education—were both emphasized in this organization. This emphasis generated some questions as to how these systems operated within the same corporation. What were the specific characteristics of these programs? Given that they were resident in the same corporation, were any of these characteristics shared? How were they similar or different? What attributes supported or inhibited the provision of resources in these systems?

Consistent with the apparent emphasis on work-life programs and training and development in this organization, there is considerable research that supports the business case for both work-family programs and training and development in organizations. A number of publications have identified the bottom-line value of work/life strategies, where the quantifiable benefits of programs far outweigh their costs (for examples, see Work and Family Connections, Inc., a national clearinghouse of information about work-life issues). In response to the interests of employees and organizations alike, topics such as communicating across work/home boundaries (Clark, 2002); job flexibility and work-family balance (Hill, Hawkins, Ferris, & Weitzman, 2001); the individual and organizational consequences of excessive work and life/family demands (Hobson, Delunas, & Kesic, 2001); home-based telework (Sullivan & Lewis, 2001); parent education and employees' ability to focus on work (Breuer & Mosekovic, 1994) and the challenge of work/family issues in terms of career development (Kahnweiler & Kahnweiler, 1992), have received increasing attention in the management literature. In addition, providing developmental opportunities is noted to be a key strategy for attracting and retaining workers, especially the Generation X employee who places a high value on learning opportunities in the workplace (Losyk, 1997).

Research has suggested that, when the interests of the investor, the manager, and the employee are aligned as tends to occur in high quality of work life companies, these companies can also experience exceptional growth and profitability (Lau & May, 1998). Yet, many corporations remain unconvinced of the benefits of these programs and eschew efforts by HR professionals who propose these initiatives. Gaining additional knowledge of how programs such as training and development and work-family education are structured and implemented in specific organizations in which they are emphasized can be of considerable value to those, such as HRD professionals, who are engaged in promoting these types of programs in organizations and providing the business case for their establishment.

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This paper reviews the findings of a case study of one corporate organization that, as noted earlier, had identified itself as emphasizing both training and development and work-family education. A comparative analysis approach was used to describe the key features of each system, their similarities and differences, and common issues across these systems. This comparative analysis case study is shown to provide unique insights into the implementation of training and development and work-family education in corporate organizations. Implications for HRD professionals working to enhance the effective provision of development systems in organizations are explored.

### **Theoretical Framework**

Comparative systems analysis utilizes the principles of systems theory in making determinations of how one can learn from an analysis of the features of systems that are interrelated in some way. Swanson (2001) defined systems theory as capturing “the complex and dynamic interactions of environment, organizations, work processes, and group/individual variables operating at any point in time and over time” (p. 305). Systems theory is considered to be one of the primary theoretical foundations of Human Resource Development (HRD) (Swanson, 1995; Swanson & Holton, 2001). Jacobs (1989) specifically addressed the application of systems theory to HRD, noting that general systems theory provides an underlying structure for the HRD profession. Specific to educational systems, Banathy (1973) advocated developing a *systems view* of education, which involves both observation and developing a model of a system and the integration of systems concepts, principles and models into one’s thinking. Senge (1990) also asserted that systems thinking is a conceptual framework that allows us to see the “invisible fabrics of interrelated actions” (p. 7).

Furthermore, Swanson (2001) proposed that, when implementing systems theory principles for practice, HRD needs to understand how development and other sub-systems “connect and disconnect from the host organization” (p. 309). In looking at education systems, it is, therefore, important to note that they are closely connected to the organization that supports them. Although the application of comparative systems analysis in this case study does not fully explore the interactions with the environments of the subsystems studied, it does describe interrelated systems and notes the relationships between them, and thus provides us with a lens on the attributes that may be affecting the provision of education resources in organizations.

### **Comparative Analysis Methodology and Methods**

Case study research has considerable potential for comparative education, as comparative studies can lend unique insights on the implementation of particular programs (Crossley & Villiamy, 1984). For this particular case, the method of comparative analysis was employed to study the various features of training and development and work-family education systems within one organization. This particular analysis used the contrast approach where two systems are selected for comparison in an exploratory manner without prior expectations as to what the outcome will be (Copa, 1998). The process of comparative analysis aligns with qualitative case study methodology (Merriam, 1998) in that qualitative case studies employ an inductive approach and are initiated when one wants to gain an in-depth understanding of a bounded system, such as a program or organization.

The site for this comparative analysis case study was a large services company, with headquarters in the United States. The company provides services in three separate markets, both nationally and internationally, and has annual sales of over \$1 billion. The two learning systems studied were the training and development system and the work-family education system. These systems were chosen as they both had been identified as areas of learning that were emphasized in this corporation; therefore, the potential for learning from a comparative analysis of these systems appeared high.

#### *Research Questions*

In this case, the process of comparative systems analysis involved 1) determining the learning systems or sub-systems to be compared; 2) describing the characteristics of the two systems to explore similarities and differences; and 3) analyzing the relationships between the systems. The research questions were as follows:

What are the characteristics of the key learning features for each system?

What problems and opportunities can be identified?

How are the learning features for each system similar and different and what are the relationships between them?

What attributes support or inhibit the provision of resources in these systems?

### *Methods*

Consistent with case study methodology, information on these systems was gained through both interviews and document analysis techniques (Merriam, 1998). Semi-structured interviews were conducted with the individuals coordinating these systems in this organization and was the primary method used to gain information on these systems. Questions addressed each of the learning system features identified by Copa (1998) as being important in describing learning systems in organizations: Signature, Clientele; Outcomes; Process; Organization; Partnership; Staff and Staff Development; Technology; Environment; Cost; and Celebration (see Table I for a definition of these learning system features). Problems and opportunities for each system were also explored. In addition, both internal documents and external resource materials specific to training and development and work-family education were reviewed.

### *Definitions*

In this study, training and development was defined as any educational program designed to support or enhance either current or future job skills. Work-family education was defined as initiatives (which incorporate policies, programs, practices, training, and cultural change) that help employees to balance work responsibilities with the various other demands of their personal lives. In defining “family”, the Ford Foundation’s broad definition was applied in this study and is as follows: “... all aspects of an individual’s personal life: those involvements and commitments, both at home and in the community, that an individual has outside his or her employment” (Rapaport & Bailyn, 1996, p. 15).

### **Findings**

The following section reviews the key components of both the training and development and work-family education systems in this corporate organization; addresses problems and opportunities; and identifies similarities and differences.

### *Comparison of Key Learning Features*

The comparison of these two systems, by learning feature, is summarized in Table 1 below.

Table 1: Comparison of the Two Systems

<b>System Description (Copa, 1998)</b>	<b>Training and Development</b>	<b>Work-Family Education</b>
Learning Signature: Purpose, mission, vision, unique features	<ul style="list-style-type: none"> <li>• Training for productivity (product)</li> <li>• Training for development -- philosophy of continuous learning</li> <li>• Development viewed as joint responsibility of employee and organization</li> <li>• Emphasis on technology-based alternatives</li> </ul>	<ul style="list-style-type: none"> <li>• Supports organizational goals related to diversity, development and empowerment of employees</li> <li>• Broad resources available to support work/life balance</li> <li>• Diversity of resources provided, recognizing the diversity of needs in the organization</li> <li>• Commitment of Cybex’s CEO to work-life issues</li> </ul>
Learning Clientele: Target group(s) served	<ul style="list-style-type: none"> <li>• Primary: direct service employees</li> <li>• Secondary: management</li> </ul>	<ul style="list-style-type: none"> <li>• All employees</li> <li>• Access is sometimes performance-based – dependent on management support</li> </ul>
Learning Outcomes: Areas in which competence is added	<ul style="list-style-type: none"> <li>• Primary: Job-specific skills/soft skills</li> <li>• Secondary: Broader management/ leadership role</li> </ul>	<ul style="list-style-type: none"> <li>• Employees: Awareness of resources and ability to easily access</li> <li>• Managers: Ability to act as</li> </ul>

		ambassadors for work-life resources
Learning Process: Approach to curriculum, instruction and assessment	<ul style="list-style-type: none"> <li>• Three-fold: Based on Customer/market; internal needs-based; unit-specific</li> <li>• Curriculum based on needs analysis</li> <li>• Four tiers of assessment (following Kirkpatrick model of evaluation)</li> </ul>	<ul style="list-style-type: none"> <li>• Resources available based on individuals needs over the life span.</li> <li>• Information-based curriculum</li> <li>• Little formal assessment</li> </ul>
Learning Organization: Organization of students, time, learning process, staff, learning settings, decision-making, and technology	<ul style="list-style-type: none"> <li>• Determined based on individual case-by-case basis</li> <li>• Decentralized services based on manager support/budgets</li> <li>• Many forms—structured training, CBTs, OTJ, informal mentoring, job shadowing</li> <li>• Individual development plans</li> </ul>	<ul style="list-style-type: none"> <li>• Determined based on individual case-by-case basis</li> <li>• Emphasis on accessibility and ease of access</li> <li>• Individual needs are key with managers as brokers</li> <li>• Manager Hotline for questions</li> </ul>
Learning Partnerships: Collaborators	<ul style="list-style-type: none"> <li>• CBT vendors</li> <li>• Management</li> <li>• Corporate policies such as tuition aid</li> <li>• Internal service-provision based (current-focused)</li> </ul>	<ul style="list-style-type: none"> <li>• Local and national partnerships;</li> <li>• Research and trend based (future-focused)</li> </ul>
Learning Staff and Staff Development: Training and experience	<ul style="list-style-type: none"> <li>• Some have strong product/technical background;</li> <li>• Broader skill set for those who assess and facilitate</li> <li>• Understanding of business processes important</li> </ul>	<ul style="list-style-type: none"> <li>• Began with Health and Fitness</li> <li>• Expertise developed over time as system defined itself</li> <li>• Expertise developed through informal means</li> </ul>
Learning Technology: Uses of technology	<ul style="list-style-type: none"> <li>• High technology usage and emphasis—CBTs, distance learning, video-conferencing</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of technology to support program implementation</li> </ul>
Learning Environment: Equipment and facilities	<ul style="list-style-type: none"> <li>• Computer labs, resource centers, multiple training rooms; district training centers</li> </ul>	<ul style="list-style-type: none"> <li>• Creative and innovative use of facilities as options are presented</li> <li>• Easy access is emphasized</li> </ul>
Learning Cost: Sponsorship (sources of support)	<ul style="list-style-type: none"> <li>• Some corporate-sponsored</li> <li>• Others through usage fees (limited by affordability issues)</li> </ul>	<ul style="list-style-type: none"> <li>• Some corporate sponsored</li> <li>• Others require individual department funding which is differentially applied</li> </ul>
Learning Celebration: Successes, completion	<ul style="list-style-type: none"> <li>• Lack of formal celebrations</li> <li>• Increased contribution is rewarded through incentives and promotional opportunities</li> <li>• Competency development rewarded through performance management</li> </ul>	<ul style="list-style-type: none"> <li>• Informally highlighted</li> <li>• Lack of formal reward or recognition systems</li> <li>• Local and national organizational recognition for outstanding program</li> </ul>

### *Problems and Opportunities*

In addition to describing the features of each system, each interviewee was asked about the problems faced by each system and potential opportunities. The following summarizes the interviewees' descriptions of these attributes of the learning systems.

*Training and development.* Although a strong continuous learning philosophy is espoused by this organization, the corporate culture does not provide the time and dollars required to fully support this philosophy. In short, job demands supersede educational opportunities. There is a perception that Cybex has the programs but employees can't use them. In addition, due to the highly competitive nature of the industry that this company serves, mixed messages are given to employees regarding the importance of training and development. The executives say that learning is important but in reality are reluctant at times to expend the dollars to support these programs. There is continual pressure to contain costs.

The designation of an executive to head up this function is a distinct advantage, in that these programs have a sponsor who is at a senior level in the organization. In addition, the CEO and the Executive VP are both strong advocates of training and development. Cybex is not an organization that is satisfied with mediocrity. Top quality and innovation in the training and development area is highly valued. In addition, the organization is demanding training and development options, the market is clamoring for it, and employees are strongly expressing their need for and interest in development.

*Work-family education.* The programs at Cybex are excellent and provide a high number of options that could be accessed at different times over the course of an employee's life span. One major problem is the disconnect between the values espoused by the CEO and the short-term focus of most Cybex managers. This prevents many of these resources from being utilized to their fullest to assist both employees in balancing work and life issues and the corporation in retaining its highest caliber employees. An opportunity for the organization would be to focus on developing a common vision among the management team regarding work/life and a true commitment across the organization to the espoused philosophy.

An additional opportunity would be to continue to explore new avenues in the work/life area. Cybex is currently considering reimbursement for overnight childcare when an employee needs to travel out of town. However, the work-life representative is aware of the need to not have this program exclude other options that employees might prefer (e.g., staying home with their child or reducing the amount of travel they do on the job).

### **Analysis of Similarities and Differences**

There are some interesting similarities and differences that can be noted from the descriptions of these two systems. First, the need for these systems to link to business objectives and ultimately, to the profitability of the organization, is emphasized in both systems. Both systems have CEO support for their initiatives although both also suffer from lack of support lower in the management ranks due to the disconnect between short-term objectives and those that can benefit employees and the company in the long-term. Both could benefit from additional incentives for their programs that equalize the emphasis placed on short-term objectives with these longer-term strategies. It is perhaps somewhat easier to make the connection between the training and development system and the achievement of business objectives than it is for the work/life programming, especially for product training that specifically relates to current business requirements. In addition, in both systems, programs are developed at the corporate level but rely on the business unit manager to effectively administer the programs, resulting in inequities in the access that employees have to these programs due to budget and management attitudes.

The description of learning features provides some interesting comparisons between the two systems. For learning outcomes, the training and development system appears to be more directly quantifiable than the work-family education system. However, the work-family education system has the potential to serve a broader group of employees (learning clientele) than does the training and development system. The learning process for both systems is based on an identification of customer needs, although the way in which the customer is defined is different between systems. More assessment of outcomes is conducted for training and development, possibly because it is more quantifiable. However, both systems have a primarily facilitative instructional role. Work-family education curriculum is more information-based; training and development is more technology-based. For both systems, the learning organization is determined on an individual case-by-case basis and is heavily dependent on managers as the "brokers" of these systems.

A primary focus for both systems is on easy access—through technology for the training and development system and through providing as many resources as possible on-site for the work-family education system. Both systems have learning partnerships, although the training and development system is more current-focused (e.g., vendors provide state-of-the-art technical training) while the work-family education system is more future-focused

(e.g., partners conduct research and provide information on trends and best practices). Both employ staff with broad backgrounds, with some staff in the training area having specific technical expertise. The training and development system provides robust technology resources while the work-family education system is weak in this area. Both systems have good learning environments and allow creativity in utilizing various options. Both struggle with issues related to learning cost for many of the same reasons—short-term objectives overwhelm longer-term development and work/life concerns. Learning celebrations (and incentive systems) could be improved for both systems. Finally, problems and opportunities also seem quite similar when one begins to look at the cultural context that needs to be in place to support these types of programs.

## Discussion

The review of the specific learning features of these two systems, problems and opportunities, and similarities and differences, provides a unique set of information from which to analyze these two systems. The following identifies some key system attributes that support or inhibit the provision of resources in these systems.

Given that these training and development and work-family education systems are sponsored within the same organization, it would seem that the opportunities for collaboration and partnership between these two systems would be greater than if these systems were sponsored by separate organizations. Although "training and development" is listed under the umbrella of the work/life system, in reality the systems are considered separate and there is little attempt made to coordinate these under a broader employee retention model. However, given the competitive environment in which this company operates, it would make sense to look broadly at the factors that influence employees' experiences on the job and to integrate these programs as much as possible to provide options for employee access at different points in their employment lifecycle. On paper at least, the work/life programs appear to provide these options. However, when access is brokered by management, these options become more limited and there is a perception that negative outcomes will occur when employees attempt to access these resources. The fear of employees that taking advantage of these options will hurt their careers is a strong impediment to these programs being effectively utilized.

Considering that there is CEO support for these systems within the organization, one might ask why these systems are not as effective as the description of the programs imply. Much of this may be due to a lack of cultural supports for these programs across the organization, which leads to a questioning by employees as to whether there is a true commitment to these programs. Learning or work/life balance is not celebrated or reinforced through the reward system. There is not a common vision of the value of these types of programs for the individual employees, families, the community, and the workplace. Individual managers have been identified as exhibiting lack of belief in and resistance to the importance and impact of these programs.

Michaels (1995) suggests that, although the United States has "led the pack in studying work-family issues," the culture of our organizations may not be family-friendly (p. 1). An underlying message in the United States is that these education programs must pay for themselves *today* as opposed to looking at the longer-term impact on families and communities. By contrast, some Asian and European governments and social institutions identify the value of the family as an essential institution and as an intangible factor in the success of their economies. These cultures demonstrate their commitment to the welfare of families from a broader perspective, which stems from a more holistic view of society. Although these companies welcome enhanced productivity, the main reason many of them assist workers is for the betterment of all (Michaels, 1995). US businesses may benefit from the examples of these international education systems, which have a broader perspective on the value of programs that enhance not just the organization, but also the family and community.

In the interviews conducted for this study, Cybex's CEO was noted as having stated the following: "I want this to be the best place to work for—what would it take?" This comparative analysis suggests that, at this point, more programs and resources are not the answer. Instead, creating a true vision across the organization and ensuring the provision of cultural supports for the implementation of these systems would be potential solutions. This includes aligning the values and attitudes of managers and employees at all levels to support a more inclusive perspective on education systems, such as training and development and work-family education, in support of the individual, the family, the organization, and society. From a comparative systems perspective, these appear to be primary impediments to the effective provision of what on the surface appears to be a fairly robust set of programs and initiatives under each education system.

### Limitations and Recommendations for Future Research

This case analysis provides a lens with respect to what attributes support or inhibit the effective provision of resources in this corporate organization. Organizations that have similar resources may benefit from this analysis as to the key elements that need to be in place for expenditures on these programs to be of most value to the organization and the employees that work there. However, this analysis is limited in that interview data was solely gained through the administrators/directors of the two education systems. Although attempts were made to triangulate the information by reviewing and analyzing internal documents, additional data gained directly from employees or managers in the organization would likely provide additional perspectives on these systems. This study also focused solely on learning features of the training and development and work-family education systems; expansion of this study to specifically explore the interactions with the environments with which these two education systems interact would provide a broader systems perspective on the issues identified in this study.

In addition, these two systems are resident in many other corporations; additional research on other cases is recommended to determine whether these supporting and inhibiting factors are also found in other similar organizations.

### Implications for HRD

Rapaport and Bailyn (1996) have asserted that work/life initiatives cannot be successful in an organizational culture that does not recognize the value of employees' personal and family lives, and that success hinges on recognizing this interconnection. This comparative analysis case study finds that, although the programs are strong, the internal cultural supports for these programs at Cybex appear to be lacking. As noted by Wise and Bond (2003), objectives that are set for managers are often incompatible with formal work-life policies and both culture and resources play a large part in whether the intentions for work-life policies and actual organizational and employee outcomes are achieved. In this particular case analysis, the resources provided were robust, yet cultural constraints inhibited the provision of these resources. HRD professionals who maintain primary focus on the program aspects of their role may find that these programs fall short of their intended outcomes. As noted by Swanson (1995), a disconnect between HRD and performance (individual or organizational) will be detrimental to both the employee and the organization in achieving its goals and objectives.

This case analysis supports the contention that the importance of reshaping the underlying organizational culture versus a focus only on programs or policies is critical to an organization achieving the potential benefits of educational strategies. It serves to emphasize that cultural awareness is equally as important as the actual implementation of programs; otherwise, these programs are not likely achieve their intended outcomes. This is important for HRD professionals who are tasked with ensuring that the outcomes of their programs are aligned with business objectives. This comparative case analysis brings to the forefront this issue of organizational cultural attributes as critical to the success of program initiatives, and reminds us that this attribute must be 'front and center' in any organizational initiative, but especially those that are tied to learning and development.

\* *Cybex is a pseudonym for this organization.*

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