Making decisions about workforce development in registered training organisations

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Research activity 8:
Examining decision-making about workforce development

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Publisher's note

About the research

Building organisational capability relies on effective workforce development. This study examines the processes that registered training organisations use to make decisions about workforce development and also looks at how well these align to the personal decisions staff make about their own development.

The important drivers of workforce development are maintaining vocational currency and building the skills of the organisation's workforce to enhance teaching quality and the level of service to the registered training organisation's clients. It is also a way of building staff morale.

Key messages

- Large public providers, in some cases, see themselves as overly constrained by their training authorities.

- In addition, the top-down approach to workforce development adopted by the large registered training organisations can lead to local practices that are distinctly different from their strategic or operational intentions. Communication failures occur and, as a consequence, well-intentioned strategies are not implemented with fidelity.

- Managers and staff in private providers have a more consistent vision of their mission and this is reflected in their approaches to workforce development, such that organisational and personal development needs are generally in harmony.

- Most registered training organisations take a comprehensive approach to the development of their workforces. However, the effort is focused on teaching staff and managers and rarely addresses the needs of support staff, despite their often key role in assuring client satisfaction.

- For many staff, the terms 'staff training' and 'staff development' have unfortunately become too closely identified with performance management, through which poorly performing staff are assigned remedial training.

Readers interested in this topic should also read *Human resource management in Australian registered training organisations* (forthcoming) by Andy Smith and Geof Hawke. Other components of the research program on building VET provider capability are available at <http://www.ncver.edu.au>.

Tom Karmel
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Executive summary

Purpose

The purpose of this research activity is to understand further how large and small registered training organisations (RTOs) make decisions about the allocation of resources for developing their workforces. Six registered training organisations—four technical and further education (TAFE) institutes and two private providers—were selected for this project. The research also sets out to understand more about how individual staff members make decisions about their professional development within these registered training organisations. These concerns are important because, while there has been a great deal of focus in Australian and international research in recent years on the professional development needs of 'the new VET professional', this has not addressed how organisational and personal decision-making about workforce development actually occurs—and how it might best proceed.

Thus the three specific goals of the research were to:

✧ review recent literature and evidence from Australian and international researchers on human resource decision-making, especially in relation to teachers' professional development

✧ explore forms of decision-making used in VET providers (for example, registered training organisations) and identify factors influencing this process

✧ identify how decisions staff make about their own development relate to those made by the organisation.

Rationale

There is clear recent evidence from the literature that the Australian vocational education and training (VET) system has placed a great emphasis on professional development targeted at addressing the many and varied needs that arise from the changing workplaces of registered training organisations themselves and the environments in which the organisation's clients work (for example, Clayton, Fisher & Hughes 2005; Dickie et al. 2004; Harris, Simons & Clayton 2005). As well, there is the notion of 'the new VET professional' and how this is to be realised in the Australian VET system (one example is David Rumsey and Associates 2002, but see also Guthrie, Perkins & Nguyen 2006).

However, in the past decade registered training organisations have been undergoing many structural and other changes which have been transforming the relationship between management and their staff, and the strategic and administrative approaches adopted by these institutions.

The Australian and international human resource development literature offers a wide range of recommendations for 'good' or 'best practice', many based on sound good sense, others on particular perspectives (for example, a local initiative such as Frizzell & Walpole 1996 or the series of reports prepared for the former Australian National Training Authority[1], such as Victoria

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[1] The Australian National Training Authority (ANTA) was abolished in 2005 and its functions assumed by the Department of Education, Science and Training (now the Department of Education, Employment and Workplace Relations).

University of Technology 1999). However, not many of these recommendations are empirically based or arise from investigation that seeks to examine or evaluate actual practice in some detail. In particular, there has been little research on the decision-making rationales that underlie an organisation's choices about the development of its workforce. What does exist suggests that it is common to find a disjuncture between the high-level strategic decisions being made by senior management and the day-to-day decisions made in the workplace (for example, Maree 2000) about workforce development.

This research seeks to examine such issues in the context of a small selection of public and privately operated registered training organisations in order to explore decision-making processes about workforce development across and within these organisations. These organisations were located in three states/territories and were predominantly metropolitan based, although one TAFE institute and one private provider serviced rural and regional areas.

Key findings

The study of these six registered training organisations shows that they differ widely in their approaches to workforce decision-making. The size and operational context of the registered training organisation is key to explaining these differences.

Public sector registered training organisations are increasingly adopting management systems and models that were previously typical of private, for-profit organisations. However, the participating registered training organisations implement such changes under considerable constraint. In some states/territories, governments have withdrawn the decision-making capacity from registered training organisations in key areas associated with workforce development. In others, they maintain 'autonomy', but are subject to many regulatory caveats which affect the degree to which they can undertake the workforce development they really need. Other registered training organisations are much more able to determine their own policies and practices. However, these organisations are also typically much smaller, more reliant on personal relationships between staff and management, and are much less likely to have a formal approach to workforce development. There is also a greater harmony between the workforce development needs of the organisation and individual development needs, and a greater level of understanding about the course the organisation is plotting. However, this can also mean that they frequently lack a systematic means for understanding and developing future workforce demands. Strategies appropriate for larger registered training organisations are unlikely to be viable or effective in smaller organisations because their smaller counterparts operate on more direct and personal relationships between staff.

In the larger public organisations studied, senior management decisions primarily shape the large-scale features of their workforce, such as the balance of teaching staff between discipline areas. It is less evident that management at this level is concerned with more operational decisions relating to the development of the workforce. Moreover, decisions at senior management level primarily affect the teaching workforce and much less often concern other employees in the organisation.

It was common to see the various sections in the participating large registered training organisations making different workforce development decisions (especially about individual access to professional development). Section heads in these organisations understand and describe the rationale of central decision-making quite differently from their senior managers. In particular, they are often unaware of issues of organisation-wide strategic importance that are not directly relevant to their own section. The reverse is also true.

At the individual level, decision-making about a staff member's own development is now commonly linked to the organisation's 'performance management' approach. This approach often positions professional development as being an activity primarily concerned with remediation of failure rather than as an opportunity for growth. In addition, formal development programs may be mandated by senior staff to inform other staff of new or changed statutory requirements or of the

introduction of new administrative systems. However, some staff saw such programs as having limited impact and value.

The effect of local managers in setting the tone and environment for workforce development is critical. There are examples of chief executive officers who are highly visible and who influence the character of their organisations. In many larger registered training organisations, some sections were notably more positive and optimistic than others. However, the growing size of many registered training organisations has meant that, in some cases, senior management has little direct influence on the operational environment of many sections within the organisation.

Introduction

There has been a great deal of focus in Australian and international research in recent years on the professional development needs of 'the new VET professional'. However, less is understood about how different registered training organisations (RTOs) make decisions about how they allocate resources to developing their workforce. Even less is understood about how the decisions they make relate to the personal development choices being made by individuals within those organisations.

Previous research has indicated that registered training organisations operate within a framework in which their approaches to decision-making vary, according to the issues being addressed. These issues include those with a national focus, to those more focused on the specific institution itself. Moreover, while there is still very little research on the many different kinds of registered training organisations that have entered the vocational education and training (VET) system in the last decade, it appears likely that different approaches from those adopted in public registered training organisations will be used by enterprise and small private registered training organisations.

So, in its broadest terms, this research set out to discover how registered training organisations and individuals make decisions about workforce development. It is also part of a broader program of research conducted by a national consortium of researchers, which has been designed to help registered training organisations build their organisational capability.

What we know

Recent Australian literature has examined how the Australian VET system should respond to the changing operational climate in which it functions (Clayton, Fisher & Hughes 2005; Dickie et al. 2004; Harris, Simons & Clayton 2005). This research, building on related earlier work, found that VET practitioners at all levels were increasingly being required to utilise a range of new skills that were not part of their traditional expertise. In particular, these involved skills more commonly linked to business practice than to education. The studies also noted that systems and registered training organisation leaders were highly variable in the ways in which they responded to these emerging needs; these studies sought to identify some basic approaches that could be adopted commonly.

There is also a body of Australian literature that describes particular, often systemic, approaches to the development of the VET workforce (for example, Australian Flexible Learning Framework 2003; Corben & Thomson 2002). They propose that effective solutions can be found in the development of locally focused initiatives that directly address the specific circumstances and which build upon the initiatives of individual staff. A great deal of this literature appears as illustrative of instances of 'best practice'.

These two bodies of literature also report a number of drivers that systems and registered training organisations identify as those which have impelled them to take new approaches to workforce development, to introduce new strategies or to abandon long-standing practices (examples include Moy 2001; Rice 2003). The Skill Ecosystems group of projects (Alcorso 2006), for example, has developed in response to the perceived need to integrate the provision of vocational education and training more completely with the relevant business structures and systems. This has led to VET workforce development activities integrated with those of related industry groups and systems.

However, this literature does not generally consider how registered training organisations or VET systems understand the importance of those drivers or how they use that information in making their decisions about how workforce development might best proceed. Rather, they present the outcomes as self-evident and unproblematic. This research began from the perspective that such decisions are more typically the consequence of a complex interplay of organisational factors that are more clearly seen in the wider literatures exploring organisational decision-making. Consequently, it has been useful to look at that literature and other literature that extends beyond the Australian VET sector.

Some recent work by Seddon and colleagues has begun to explore the issues associated with workforce development for the Australian VET sector. Seddon (2002), for example, has explored the impact of the 'marketisation' of VET provision for the sorts of pedagogical approaches that teachers need to develop.

Moreover, almost all Australian studies in this area have looked at these issues from the perspective of senior management or from the collective organisational level. The closest one of these studies gets to considering the perspective of individuals in the VET workforce can be found in the usually, simply descriptive, accounts of small, project-based teams involved in such programs as Learnscope and Reframing the Future.

However, the broader literature suggests that individual staff members are key players in determining whether, and how effectively, centrally mandated programs are taken up (for example, Lichtenstein 2000). Thus, the perspective of staff is important and yet is missing in much current research.

Let us look briefly at what these various literatures tell us and which helped us to focus our research questions.

Professional development and workforce development

The title of this section reflects a shift in the language and in the conceptualisation of this area of registered training organisation activity that has been emerging in recent years. In the 1970s, the predominant term was 'staff development' (for example, as used in one of the earliest national reports, that from the Technical and Further Education Council's Staff Development Advisory Committee—the Fleming Report—of 1978), itself a change from earlier descriptions as 'staff training'. Subsequently, the terminology became 'professional development', especially following the release of the Kangan Report (Australian Committee on Technical and Further Education 1974) and its focus on upgrading the status of TAFE and the professional qualifications of TAFE teachers. More recently, this term has given way to that of 'workforce development'. This signifies a primary concern about workplace rather than individual capacity. The language use and emphasis appear to be shifting for a multiplicity of reasons, but important among them are:

✧ a wish to indicate that the thinking, approach and practices about staff's continuing development have changed from what they were to something that is better and more 'contemporary'

✧ an intention to indicate that the focus has shifted from a more instrumental and technical one to a growth model more appropriate to a 'professional' audience

✧ most recently, a greater concern with the development of the organisation as a whole through approaches that extend beyond the development of the individuals currently in the workforce.

The term 'workforce development' has been transferred to the sphere of internal organisational development from a broader notion that was originally developed to provide a comprehensive framework for the development of the entire workforce or significant sectors of it. The most influential definition of this broader notion is that of Jacobs and Hawley (in press, p.12):

> Workforce development is the coordination of public and private sector policies and programs that provides individuals with the opportunity for a sustainable livelihood and helps organizations achieve exemplary goals, consistent with the societal context.

However, as the New South Wales Council of Social Services indicates in its analysis of the changing uses of this term:

> Increasingly, contemporary research and policies also recognise the need to focus at the organisational and strategic systems levels as well. Workforce Development can be seen as a combination of managing the size and composition of the workforce, retaining and managing that workforce and skilling that workforce.
>
> (New South Wales Council of Social Services 2007, pp.1–2)

While the Australian literature on workforce development in registered training organisations is only just emerging, it is significant that very little of it attends to the broader functions that the New South Wales Council of Social Services discussion emphasises. For almost all of the recent literature, the term 'workforce development' is used synonymously with the range of functions traditionally associated with 'professional development'.

The changing climate for registered training organisations—the new 'VET professional'

One of the more influential ideas that has driven a re-assessment of professional development approaches and priorities in Australian VET in recent times has been that of 'the new VET professional', a concept first introduced by Chappell (2000). While the term has not always been readily accepted, the notion that the climate in which the VET sector's teaching workforce operates has changed—and that this has implications for the key skills required for the conduct of professional practice—has been widely accepted.

Thus, a range of projects have sought to define these new skills and identify the new approaches to developing them that are required. The studies focusing on the 'new' professional have ranged from early attempts to develop sets of competency standards (Hawke et al. 1998) to more recent attempts to look at broad strategic approaches at state or national levels (David Rumsey and Associates 2002; Deborah Wilson Consulting Services 2003; Dickie et al. 2004; Guthrie, Perkins & Nguyen 2006). They show that, while there was a core of common understanding about what comprised the 'new' VET professional, there was also great variation in how the notion was understood and what priorities were seen to apply.

Lessons from the wider literature

One of the key shifts in focus that can be found by looking at the management and human resource management (HRM) literatures is the shift in thinking away from a more reactive stance on workforce training and development to one that takes a broader, more strategic position. This shift to what is often referred to as 'strategic HRM' is partly reflected in the changing language noted earlier. The adoption of a 'workforce development' approach that involves 'managing the composition of the workforce' extends beyond simply training and development to encompass a wide spectrum of human resource management functions. It includes aspects of workforce planning, including staff selection, issues about planned staff retention strategies and comprehensive approaches addressing workforce composition and balance (see Smith & Hawke forthcoming for a discussion of strategic human resource management).

What this means is that workforce development and human resource management overlap in almost all their activities, because the suitability of a workforce for the tasks required of it is

determined as much by workforce planning, selection and retention as by the training and development of individual employees.

Ideas about 'empowerment'

One of the popular strategic directions that periodically move to the front of organisational thinking about human resource development is the notion of 'empowering employees' to take responsibility for their own actions within their work roles. This includes their own development.

While such an approach has attractive features, especially in the context of 'professional' employees, two factors are identified in the literature as being significant constraints to the effectiveness of such an approach. The first is that there are often tensions between the organisation's priorities and needs and those of its employees. As Fenwick (2003) observes, these differences are not necessarily causes of serious difficulty, but they do require careful and deliberate management.

The second concern is that the evidence for the effectiveness of such an approach is quite mixed, with some studies (for example, Thompson & Kahnweiler 2002) suggesting that there is limited or no gain from increasing employer participation in decision-making.

Individual decision-making

It is an interesting feature of the literature that there is remarkably little which examines the decisions made by individuals about their own development in the context of the strategies being adopted by the organisations in which they work. There is an extensive literature that concentrates on the decision-making processes and concerns adopted by organisations, but little that examines how employees' choices are shaped or influenced by those organisation-level decisions.

We can gain some insights into the ways in which individuals make their own choices by considering the literature on lifelong learning and workplace learning. This literature is complex and diverse but, for the current purpose, emphasises the importance of the workplace context as acting either to inhibit or encourage learning. Importantly, too, it distinguishes between what is often discussed as 'productive learning', that is, learning directed towards socially positive ends, and other learning that is not. Of course, what constitutes socially positive ends is a contested issue.

Hodkinson and colleagues in the United Kingdom have explored the application of ideas drawn from the workplace learning literature to the development of teachers in English secondary schools. Hodkinson and Hodkinson (2005) report that the individual characteristics of the teachers are but one of three factors that shape the types and extent of learning teachers undergo. Equally significant are the practices and cultures of the sections (departments) in which they work and the overall policy, management and regulatory frameworks. Their research emphasises the importance of providing opportunities for teachers to learn—an 'expansive learning environment'—and this is consistent with the findings of other Australian research such as Chappell and Hawke (forthcoming).

Another area from which useful literature is emerging is in the context of research on career development. Its relevance to the present concern about workforce development is reflected in the work of researchers such as Poell and his colleagues in Holland (for example, in Van der Sluis & Poell 2003). Van der Sluis and Poell quote Walton (1999):

> The boundaries between what constitutes career development and what constitutes employee development are becoming blurred.   (Walton in Van der Sluis & Poell 2003, p.227)

Their research supports the view that there is a reciprocal impact on learning, deriving both from the organisation's learning environment and the individual employee's propensity to exploit the available learning opportunities. This view is consistent with the findings in another of the research activities associated with the consortium investigating VET provider capability (Chappell & Hawke forthcoming) and emphasises the importance of the learning that occurs outside the context of

formal training arrangements. The notion of what constitutes 'career' in the Australian VET system is also explored by Simons et al. (forthcoming) as part of the consortium's work.

Together, these suggest the importance of creating a climate or organisational environment in which the 'right' type of learning can occur. The literature provides extensive indicators of organisational barriers that inhibit staff take-up of learning and, specifically in the context of teaching staff, it appears that broad organisational culture is a significant factor (Lohman 2005). Research on the culture of VET providers makes up another component of the consortium's work (see Clayton et al. forthcoming).

Project method

This project sought to examine the workforce development decisions made by, and processes used in, a small sample of public and private registered training organisations. The six providers who participated came from three states/territories and included four TAFE institutes and two private registered training organisations. While the majority served a metropolitan audience, two (including one of the TAFE institutes) drew substantial business from rural and/or regional areas. The project involved two forms of data collection:

✧ a series of interviews with senior management who had workforce development responsibilities in four TAFE institutes and two private training providers. In the TAFE institutes, a small sample of line managers was also interviewed. Both of the private registered training organisations specialised in providing training services to a particular industry segment—one through arrangements with employers and the other through public courses for students. During these interviews, relevant materials were also gathered from each of the participating registered training organisations

✧ a series of interviews with a range of staff (teaching and non-teaching) from the same registered training organisations.

In addition to the 14 senior staff representatives interviewed, 63 individual staff contributed, some as part of small group interviews and others in individual interviews.

The interviews with senior staff used a semi-structured framework that focused on whether, and how, the registered training organisation used formal processes for developing workforce development plans; how those were managed within the organisation; what involvement staff had in the process; and what were the issues and pressures that shaped and influenced the choices they made.

The registered training organisations participating in the study were recruited by direct approaches from the researchers and had volunteered to be involved. Within each, the initial contact was generally with the chief executive officer and/or another senior staff member with human resource development responsibilities. Agreement was then reached on the number and range of staff to be interviewed and timeframes in which this could occur. A broad outline of the form the interviews would take and the sorts of issues to be covered were provided, in the expectation this would be passed on to those involved.

The request indicated that, as far as possible, all interviews should be one to one. However, a number of interviews with staff were conducted in small groups of two to three individuals, usually from the same section within the registered training organisation. Line managers were not interviewed with staff but always one to one.

The interviews with senior staff typically lasted around an hour and included the collection of material indicating the registered training organisation's formal processes and policies. For three of the four TAFE institutes, the chief executive and one other senior staff member were interviewed. In the fourth, the two senior managers with human resource development responsibilities were interviewed. In the two private registered training organisations, the chief executive officer was the primary source, but other staff also contributed on specific matters.

Materials collected from registered training organisations included such documents as staff development plans and/or calendars, policies on staff development, external training and workforce planning instruments—including surveys and plans.

For the individual employees, the interviews typically lasted around 30 minutes and focused on their recent engagement in developmental activities, their knowledge of, and attitude towards, any centrally mandated strategy or plan and the bases upon which they made their own decisions about development opportunities and activities. Table 1 shows the range of staff interviewed.

Table 1   Individual staff interviewed

	Senior staff	Line managers	Other teaching staff	Support staff—administrative	Support staff—professional or technical	Total
TAFE institutes	10	8	34	6	4	**62**
Other registered training organisations	4	2	6	2	1	**15**
Total	**14**	**10**	**40**	**8**	**5**	77

Workforce development in registered training organisations

Understanding workforce development

Understanding of the term 'workforce development' differed considerably amongst the registered training organisations participating in this investigation. Some were not using the term to describe their own internal activities but used it to describe their function within the wider vocational education and training sector. Where the concept was being used in their own practice (three of the TAFE institutes used the term in this way, but neither of the private registered training organisations), its meaning and range varied a great deal—and this was true even within an individual organisation.

For example, in one TAFE institute, the officer responsible for staff development observed:

> It's what we used to talk about as professional development. It's mostly reflected in our arrangements for keeping staff up-to-date with both their teaching and technical skills.

However, others recognised the term as having a broader value. For instance, an institute human resources manager said:

> We're now focusing a lot of our activities on looking towards the kind of workforce we'll need in five to ten years—the mix of skills and people that will be needed. Training is important but it's only one tool we're planning to use.

For most of the TAFE institutes in this study, however, the adoption of this broader understanding was relatively new and not yet well formed. In two of the four institutes, management was still in the planning phase, with one having to defer the development of a workforce plan because of staffing shortages. In this case, the institute was about to initiate a major review of its current and future operational environment, and use that as the basis for developing a long-term strategy.

For the other still in the planning phase, the senior management group had only recently agreed to start a process of examining their current staffing mix and considering what sort of workforce may be needed in the future. In this case, a major factor taken into consideration was that past attempts to think along these lines had been rendered fruitless when decisions taken by their state training authority had limited or negated any control they had over their own staffing. Recently, the state government had indicated that institutes might be granted greater autonomy on these matters in the future and so the issue had been revived.

Senior management, however, was cautious about how much effort to put into this process until they could be confident of its value.

Of the remaining two institutes, one had made a commitment to a broad workforce planning approach and had also committed considerable resources to developing fresh strategies that addressed the strategic recruitment of new staff. However, since developing those strategies and mechanisms, the state government had removed much of the institute's capacity to manage recruitment and was reinstating a centralised recruitment system. The dilemma for the institute's senior management now was how to continue their overall development strategies under these circumstances, and this was the subject of substantial internal discussion. This was the only one of the institutes to have a formal 'workforce development plan', as opposed to the professional development plans and/or organisational development strategies typical of the remainder.

The fourth institute had consciously not adopted a broad approach but instead had chosen to retain distinct functions for recruitment and staff training. In this case, the decision had been made because, having watched other institutes implement a more strategic approach, the institute had reached the conclusion that the consistent pattern of high-level policy change that has characterised the VET sector for some time made their operational context uncertain.

This is not to say that the institute took a conservative approach. It did not. Many of its specific programs were innovative and effective. For instance, this organisation had introduced a range of internal processes for keeping staff informed and actively engaged in strategic planning, and the staff felt that management was genuinely responsive to their views. The institute chose to differentiate between those areas of its internal management over which it had control and those where the effects of external forces were more unpredictable and where the risk of making incorrect decisions was judged to be too great.

Each of these descriptions indicates a key limitation noted by the senior TAFE managers interviewed. This was the limited capacity of their institute to adopt a comprehensive workforce development approach, a consequence of the interaction between their legislation and the ways in which their central government operates. Thus one manager observed:

> I can live with us not having the autonomy to plan our own recruitment strategies. What I can't easily live with is the failure of [the department] to take responsibility for doing so. All of the institutes in this state face similar issues with their workforce, but we all have to stumble on pretending there isn't a problem.

The small size of the private training organisations typically meant that their approach to this developmental challenge was much less formal and structured. Neither had a formal workforce development plan and only one had a formal plan for the development of its staff. Both, however, had a strong sense of their future strategic directions, and the management was acutely aware of the importance of their workforce in achieving those goals.

One of these organisations had a senior officer whose role specifically included strategic planning for their workforce needs and this was a component of her performance appraisal. However, the small size of the management team and the regularity with which such issues were discussed in both formal and informal meetings had meant that they'd not seen the necessity of creating a formal, documented plan. Indeed, their approach was that, beyond a clear agreement on their future directions and goals, the management needed to be free to respond flexibly and rapidly to emerging situations and to 'seize opportunities as they emerge'. Thus, the organisation had recently recruited a senior, experienced teacher in an area where they were already strong because they 'couldn't afford to miss the opportunity of bringing her on board'.

Staffing in the other private training organisation had largely proceeded on the basis of personal and industry connections rather than according to any more elaborate strategic purpose. Moreover, this organisation had no formal internal staff training system but relied on its staff to self-identify any training needs. Where such needs were identified, the management was typically able to assist with time or finances—'it's never really been an issue for us'.

All of these organisations were able to demonstrate a range of laudatory and effective activities— especially those concerned with 'professional development'. What few had seriously attempted to achieve, however, was to bring these together within an integrated framework, where the different strategies could combine to work in concert.

The process

Responsibility for the workforce development strategy ultimately resides with either the chief executive or the senior management team in most registered training organisations. The processes involved in forming the strategy fall more often to a designated senior manager.

Registered training organisations develop their strategies in quite different ways.

In the private registered training organisations, as noted earlier, this is usually an informal process embodied in the organisation's overall mission or vision and then enacted in the recruitment and staff management practices of the organisation.

In the larger, public registered training organisations it is more common to have some annual or bi-annual planning process within which are embedded various aspects of workforce development planning. A number of the registered training organisations in this project engaged staff at some stage in a scenario-setting or futures-planning activity, which kick-started the development of one or more documents. A number of the registered training organisations circulated intermediate drafts to some or all staff for comment (sometimes the staff meetings were concerned with an early draft).

However, in all cases the senior management group made final decisions. This process usually involved debate and discussion on well-developed drafts, and the managers involved brought to the discussion their assessments of the political, industrial and organisational climates that might impact on the final decision. They reported that, while staff input was important, they were able to 'bring to the table' information and considerations that were not widely known to staff (and sometimes could not be provided to staff). Thus, the outcomes sometimes diverged significantly from what staff might have expected.

The managers described this as being typical of the way in which most top-level decisions were made in their registered training organisations and that usually the document represented a consensus position rather than a negotiated compromise.

Thus larger organisations typically used more formal processes which, in some cases at least, didn't engender a sense of ownership by some staff, while the less formal processes adopted by small providers were more likely to ensure that a commonly held position was ultimately achieved.

Key drivers

The forces operating on these registered training organisations and shaping their approach to workforce development were often those that reflected the specific circumstances of the registered training organisation. However, there were some common themes across all or many of them.

Most central was the concern to ensure that teaching staff were technically competent and up to date.

Teaching currency

For the TAFE institutes, teaching currency was linked to the length of employment typical for many classes of teacher. The consequence of this was that many staff were perceived not to have maintained currency in their industry skills, especially with the emerging technologies now in use in their industries. Almost all of the senior managers interviewed cited the difficulty of finding a means of providing refreshment and updating opportunities for staff as one of their greatest needs and greatest frustrations. The difficulties in achieving what they knew needed to be done were many, but the most commonly cited were the severe limitations on their financial capacity to backfill for staff who were in extended placements in industry, the difficulty of finding employers who were willing and able to take teaching staff into their workplaces for even short periods of time, and the plethora of regulatory, insurance and other administrative hurdles that were involved.

One TAFE institute, despite all of these difficulties, was expanding a program it had introduced some years earlier to provide staff with extended periods of industry experience. Indeed, it couldn't meet the demand from its staff and had developed a means for assigning a priority for accessing the system to different classes of staff.

For all the institutes (and to some degree, the private providers) this concern was exacerbated by the ageing of their workforces. Concern about the imminent loss of a large pool of experienced staff was the single most commonly cited workforce issue identified by managers (and also by staff).

Teaching requirements

The management in all of the TAFE institutes interviewed had, in recent years, also recognised that an issue lay with staff teaching skills—particularly their quality—arising from the new approaches to learning. Consequently they had substantially increased opportunities for staff to acquire new skills in this area. One senior manager noted:

> For a long time we'd largely just accepted that once a teacher had completed their degree we didn't need to worry about teaching skills. But things have changed so much with new approaches to teaching, teaching in new contexts like the workplace and the recognition that many teachers don't have a teaching degree any more, that we had to do something.

The approach adopted by the institutes, however, varied dramatically. Some had expanded the opportunities for their staff to acquire formal qualifications; others had developed substantial in-house training programs; another had introduced an informal network system involving mentors and coaches, combined with peer-to-peer sharing arrangements. In general, however, these approaches involved creating opportunities for staff to elect to take up learning. Only one of the institutes had a system that sought to identify where difficulties or skills issues were arising and to specifically target those, although one other institute was considering a similar approach.

One of the private registered training organisations had instituted a system whereby newly recruited staff were supported in gaining a formal certificate IV qualification from an external provider through the development of internal resources, an induction program and a number of class sessions.

Commercial role

A strong driver for the TAFE institutes, but not for the private training organisations, was the need to introduce a more commercial business orientation to their operational practice. This was a source of real difference among the institutes, as some saw this as an all-pervading issue that needed to concern the entire staff of the organisation. For them, it was a matter of creating a new and different organisational culture.

For other institutes, however, the need for business and commercial skills was seen as applying only to certain staff, but often including those in management positions. The issue for these institutes was deciding how these skills were to be allocated across the institute and how that could be done in ways that were equitable and effective. For example, one institute was considering an approach that, effectively, involved two distinct businesses operating in parallel—one concerned with commercial activity and one with publicly funded training. In such a context, their recruitment and other strategies would possibly diverge for each sub-business with, perhaps, a greater emphasis on commercial experience for those recruited into the commercially focused business. A critical issue they were discussing, however, was how they would manage these 'different worlds', when a significant number of staff might operate in both. One senior manager was concerned that:

> At any given point of time it's not likely that we'll have enough commercial business to sustain a full-time appointment in many highly-specialised areas so we'd want to draw on our resources in the mainstream program. How do you do that if different appointment criteria apply?

Most of the institutes regarded training as, at best, only a partial solution to this issue and were examining a range of culture-change approaches. However, none of the senior managers interviewed seemed to have a really clear idea of how such cultural change occurred and many seemed to be reliant on a new culture emerging 'over time'. The most common strategic approach adopted by the institutes was to focus on building a new organisational culture through the selection of appropriate middle managers who would embody and model the new behaviours for staff.

A key driver for private registered training organisations was the need to ensure the maintenance and growth of their distinctive cultures. Both of the private registered training organisations in this study were able to draw on discussions with colleagues in similar organisations and they noted that the strength of providers such as themselves lay in the highly personalised and customised services they were able to supply to their industry customers. Success in this type of strategy was highly reliant on employees who 'fit' the organisation's culture, and this was their dominant objective in recruitment and a key factor in staff retention.

In conclusion, it appears that registered training organisations and their staff are struggling with the shift towards a more commercial approach. This involves a very substantial cultural change for many and the pressures to achieve this within very short timeframes present a challenge which has yet to be overcome. Organisational culture and issues of cultural change are discussed in greater detail in another of this research program's reports (See Clayton et al. forthcoming).

Non-teaching staff

The workforce development strategies adopted by all of the training providers were focused almost entirely on the teaching staff of the organisation.

The large TAFE institutes explicitly included opportunities for non-teaching staff in their professional development calendars, and applications for study leave or similar were often circulated to all staff. However, with one exception, this was the full extent to which thinking about non-teaching staff was reflected in the institute's documentation and in the interviews with senior managers.

When prompted, some institute managers were able to identify initiatives that had been directly targeted to non-teaching staff. However, typically these had been initiated by local supervisors and did not form part of any institution-wide program or strategy. In one case a manager noted that:

> Our technical staff in the engineering area have recently done some training on new types of equipment that we've introduced for some of their industry courses. The manager there had been asking for some years for the training to be offered and finally found the funds himself to organise it. It was a critical thing for us to have done as a number of the teachers we've recruited in that area had been complaining that they had to do the machine set-up themselves because no-one else knew how.

The exception to this pattern arose in an institute in which the library was relocated to a new building on another campus. In the process the whole operation of the library was being upgraded to make much greater use of internet-based systems. The process for establishing the new facility included the retraining of the library staff to enable them to utilise the new systems they'd be accessing.

So sharp was this divide in the thinking of the managers interviewed (most of whom had backgrounds in the teaching area) that, when directly asked, most could not readily identify the strategic workforce development issues that faced administrative staff, grounds and maintenance staff, counsellors or many other categories of non-teaching staff. Most managers, however, recognised that the place of non-teaching staff was a neglected aspect of their planning that needed to be addressed.

The situation in the private registered training organisations was not greatly different. Neither had any plan for their support staff and had provided little in the way of development opportunities for them in the recent past, other than those arising directly from the implementation of new information technology systems or the like.

In general, then, the development of non-teaching staff was not seen to be integral to the strategic direction of these organisations. Rather, they were largely left to their own devices (as individuals or as groups), and in some cases this led to decisions about priorities that didn't match the organisation's overall strategy well.

The role of line managers

Line managers in registered training organisations are those staff principally responsible for organising the delivery of the educational programs. As such they play a crucial role within their organisations, but this is one that is becoming increasingly problematic.

Line managers in the four larger organisations were seen to be the primary source of both intelligence to inform the development of central strategies and the vehicle through which those strategies would be realised.

Senior managers saw their own role as primarily being concerned with major policy issues and so the plans and strategies for which they were responsible were generally at quite high levels of abstraction. Typically, these decisions do not engage with the operational issues of how such policies will be implemented; rather, it is assumed that this will occur as it passes down the line.

Compartmentalisation

However, the four TAFE institutes involved here are very large organisations. The chain of command from these high-level decision-makers and the points at which they become operationalised are extensive, insofar as they encompass a very wide range of sections responsible for specialised content areas and, as well, other sections with broad servicing functions. As was evident in the cases studied here, this creates a high probability of miscommunication and misunderstanding.

A senior manager indicated:

> One of our real priorities is the hospitality area. We've got a great market penetration and want to make sure our reputation with the industry is maintained. We're really trying to build up our full-time staffing in this area with top people. That's our goal.

However, a line manager in the same area said:

> We've got a lot of really great, quality staff working for us on short-term contracts. They're really dedicated and want to stay but I can't get HR to agree to employ them full-time. They want some certainty; at the moment I'm just about to tell them that I can't guarantee that I'll be able to re-employ them next semester. I probably will but HR won't let me tell them that. I know at least one of them is likely to walk.

As the above example illustrates, one of the problems facing line managers is the different understandings and priorities of various branches of the administration. Even in the institute which had a formal workforce plan in place, this was seen by many in the senior management group as 'an HR policy' and thus not something they need to take on board. This sort of organisational segmentation was apparent in other institutes as well and was often cited by staff as an issue constraining them in their ability to do their job well.

Similarly, in an institute where the improvement of staff qualifications was regarded as a central priority, a line manager complained that: 'I can't get any of my staff's applications for study approved. I've got two who are waiting on hearing if they can do Higher Degree studies but nothing's moving.' In this case, the human resources department was wholly absorbed in implementing another management directive to 'get recruitment going'.

Interpreting policy

The major difficulty faced by line managers, however, was that they were often not informed or only partially informed about the rationale underlying strategic decisions taken by senior management. As a consequence, it fell to them to make their own interpretation of what was meant by these decisions and how they were to implement them. Inevitably, policies are interpreted in very different ways in different sections within the same institution. Sometimes of course, this is an

appropriate response, as managers are tailoring a broad initiative to the individual circumstances of their sections. In others, however, it leads to the failure of important initiatives.

One public sector registered training organisation had adopted the policy of seeking to move as many of its casual and sessional staff as possible into full-time ongoing positions. In some sections this message was warmly received and acted upon with alacrity, to the extent that virtually no staff were still in casual employment. However, in other sections the managers had been so concerned with their financial position that they believed that they couldn't afford to implement this change. This had led to widespread discrepancies across the institute and, in time, to dissatisfaction and loss of morale. The problem, however, was that this situation should never have arisen, as the original decision had included a guarantee of financial support where needed. Senior management regarded this as a strategic priority, but this message and the practical support senior management promised were lost in the process of delegation to operational levels.

Workloads

For supervisors of teaching sections (that is, educational middle managers), who hold the greatest responsibility for implementing many important parts of workforce development policy, an additional issue is the heavy workloads they bear. It was evident both in the interviews with them and those with their managers and the staff they supervise that the high day-to-day responsibilities of organising classes, replacing absent staff and administrative reporting meant that these strategic matters often failed to get the attention they deserved. This is not to say that these managers are failing to provide important leadership to their teaching staff. Rather, under current circumstances, organisations cannot guarantee that the policies and strategies they determine can always be implemented when they place such heavy reliance on this critical group of staff.

In summary, these case studies suggest that for large registered training organisations the issues associated with these line managers need to be addressed. Most of the institutes were aware that this crucial role was not operating as it should, and some were looking to changing the role in some way to address their concerns. However, none of the institutes saw the issue in systemic terms but, rather, was considering changes at local levels. The examples cited here suggest that this is unlikely to satisfy the necessity for change and that a more extensive organisation-wide approach would be required.

Individual decision-making

Ultimately, the effectiveness of many workforce development strategies is reliant on the ways in which the organisation's staff engage with them. The extent to which the organisation's directions coincide with those of the individuals who comprise the organisation is central to this concern.

This study found that, while the involvement of individual staff varied greatly across the organisations studied and across sections within those organisations, staff members typically had a very poor understanding of their organisation's approach to workforce development, the goals they had set, or the strategies they had adopted.

Generally, individual staff had some awareness of the strategies or goals that affected them or their section, but only a very limited awareness of how these related to broader organisational objectives. Teaching staff interviewed for the project had been better informed than non-teaching staff.

The importance to the staff of the organisation's goals and objectives for their workforce varied both by the size of the organisation and the age of the staff members involved. In the larger institutes, the staff were much more likely to have a view about the strategy that was shaped by their own special interests and needs than was the case in the smaller private training organisations. In the latter, the staff were more likely to identify themselves as a part of the organisation as a whole, while in the institutes teachers were more likely to identify with their industry (and thus their section) or with TAFE more broadly. This is despite the fact that most claim to be highly committed and loyal to their institute. However, in regard to workforce issues, they took a narrower perspective when it came to issues of technical competence and a broader one in relation to educational issues.

Thus one indicated:

> I think that teaching skills are common across the board and we ought to be looking at something that's run by [the department] not the institute.

By contrast, another indicated that:

> [Management] want[s] to impose a one-size-fits-all approach but in [our discipline] we don't do things the way they do in, say, business studies. We know exactly how these things need to be taught and wish they'd talk to us rather than just assume they know best.

Most staff were aware of the program of development activities offered by the organisation, but their opinions were mixed in terms of their regard for them. Some believed they were good and attended whenever they could, because they wanted to be continually learning and they felt that the choice of programs offered and the expertise of the presenters made these good learning opportunities. Others held them in low regard, because they were seen as irrelevant and time-wasting. For those with these views, it often appeared to be the case that the programs they were objecting to were broad and generic and/or were seen to be concerned with 'new age' personal change agendas than with their educational roles.

Policy information not training

Although not initially a focus of the interviews with staff, another reason for staff unease emerged in the course of early interviews, and this was explored in subsequent organisations. Asked about the institute-organised activities they'd undertaken, staff most often identified those in which attendance had been virtually mandatory. Typically with those interviewed these were information sessions in which they had been made aware of new government policy initiatives, new regulatory requirements concerning accreditation, financial accountability or the like, and sessions in which they were introduced to new training packages.

All of these were described as involving 'being talked at' and were generally discussed with resignation rather than enthusiasm. Indeed, these were the only 'professional development' activities in which many of the staff had recently engaged.

Unlike the training calendars that mostly cover technical skills issues, it is clear from an examination of the lists of such activities included in institute annual reports and similar documents that information sessions such as those described above have become a substantial part of the professional development delivered in many TAFE institutes.

Awareness of organisational priorities

For almost all the staff interviewed, the material provided by their employer is seen to offer little useful information to assist them in making decisions about their own development. The signals about strategic directions available to staff are weak (either because they are unavailable or because they are so general as to be unhelpful), and their usefulness as a guide is further eroded by the frequency with which, in recent years, the messages have changed.

For example, the organisational mission statements or similar are typically couched in very broad terms, and staff, while understanding why this is so, found this to be of very little help to them:

> Of course we want to be the best provider in the state, but what does that mean I need to do?

Thus staff confidence in the management's ability to provide them with useful guidance on their own career direction is low. One teacher exemplified the problem when talking about his own career since joining TAFE:

> I'd trained as a fitter and came into [the institute] as a teacher of engineering. Then the apprentice numbers began to decline and that coincided with the IT boom, so [a manager] persuaded me to join the retraining program to become an IT teacher. By the time I finished that the boom was over and they couldn't find me a job teaching IT. Now they're calling out for teachers of fitting, but I've completely lost touch and wouldn't know where to begin now.

Most of the staff interviewed said that they made decisions about their own learning and development solely or primarily on the basis of their own assessments and discussions with colleagues. Most had formed their views about internal staff training from talking to their colleagues and/or from their own experience.

While less stark, the staff in the two private registered training organisations were also typically more reliant on information and advice from their colleagues than they were on management initiatives. However, the closer personal relationships in the private providers meant that this distinction was more blurred, as the management was often also their close colleagues.

Organisational behaviour

A key issue for most of the staff which shaped their attitudes towards their organisation and their decision to stay or leave was their perception of how others were treated by the organisation. Some believed that their organisation was a good employer, who looked after its staff and acted in their

best interests. Others were much less impressed. Significantly, this was often not uniform within any given organisation but shaped by the environment in the section in which they mostly worked.

For example, in one group interview with staff at a TAFE institute, the discussion of differences amongst the staff became quite heated at one stage. Staff from one section were at the end of their tether because they and their colleagues were, as they saw it 'regularly sacked at the end of each semester and re-employed at the beginning of the next'. Their colleagues from another section had only praise for their experience and were shocked and outraged to learn of what was happening to colleagues. Not surprisingly, the first group had disengaged from much of the training on offer and were looking to external training that might enhance their employment prospects elsewhere.

What these case studies suggest is that there is a greater disconnection between the broad strategies of management and the individual decisions being made by staff than is typically recognised by management. A key issue appears to be the difficulty most of the larger organisations face in communicating across the whole spectrum of their organisation and the consequent difficulty they have in establishing a sense of common purpose or direction.

Performance management

In recent years most registered training organisations have moved towards some form of performance management system and all the large registered training organisations in this study noted that this was a key plank in their overall workforce development strategy.

However, a common theme that arose in the staff interviews in each of the TAFE institutes was the extent to which the concepts of 'professional development' and 'performance management' had become entwined.

For most of the staff, the one time each year when issues about their own development were discussed with their manager was in the context of their annual 'performance review'. Indeed, it appeared that these interviews only rarely actually reviewed performance. Rather, they focused on discussion of what development opportunities the staff member was interested in taking up in the following year. Many staff regarded this process with more than a hint of scepticism as their experience had been that the plans entered into at this stage had little to do with what the staff member was actually permitted to do in the subsequent year.

Nonetheless, for some staff the equation of 'staff development' with 'performance management' had turned the process into something akin to a disciplinary activity, in which 'bad staff' are assigned remedial training to 'bring them up to speed'. While it is unlikely that this was ever the intention in linking these two activities, there was clear evidence in the way staff described this process that such negative connotations were becoming more widely reflected in the way in which staff approach this annual review. Moreover, it also appeared to have transferred some negative connotations to 'staff development' more broadly.

Relationship with senior management

Staff in the larger institutes typically reported that they knew and regularly saw the organisation's chief executive. They felt they had a good understanding of his or her objectives for the organisation. The same was not typically true of the next layer(s) of management, who were often simply unknown. As a consequence, it was their local managers who had the greatest impact on their experience of employment in the organisation. This discontinuity between high-level policy and planning and the day-to-day experience of the great majority of staff was reported to have increased as TAFE institutes have grown in size over recent years.

While undoubtedly the major policy settings decided by institute senior management do shape and affect the working experience of their staff, they do so through mechanisms that staff don't always see and of which they are often unaware. Consequently, staff rely on themselves and their immediate colleagues as their primary sources of guidance about their own career development.

Staff in private registered training organisations

These case studies suggest that organisational size and complexity are crucial features in the relationship between staff decisions and those made at the organisational level.

While much of what was reported in the sections above applies equally to staff in institutes and to those in private training organisations, staff in the latter are much more likely to take the organisation's priorities into account when making their decisions than are staff in TAFE.

The size of the organisation seems to be a significant factor here. One of the private training organisations had experienced significant growth in its staff base in recent years and there were many new staff in the organisation. These new staff did not have the same personal relationships with management (or even each other) that had characterised the organisation in earlier times.

Thus these staff members were noticeably more likely to rely on their own information, values and priorities when selecting from the development opportunities available to them. One observed:

> My hours don't very often coincide with too many others here, so I rely almost entirely on email to know what's going on.

> I find that really hard to assimilate, so I just skip through it. I know [the registered training organisation] is well thought of but I don't really know what the future holds for it, so I just make decisions about what I think is best for me.

In this case, the growing size of the organisation was forcing it to adopt a range of communication and other management strategies more typical of a large TAFE institute than of smaller registered training organisations. The responses of staff in this organisation—especially of those who were relatively new and who hadn't experienced the smaller, more intimate organisation—were more similar to those of TAFE staff than they were to those of staff in the other private registered training organisation.

In summary, these cases suggest that organisational size and complexity is a factor that can inhibit the smooth integration of individual decision-making with that of overall strategies for workforce development.

Conclusion

The registered training organisations studied here have generally been slow to take up broader, more strategic approaches to workforce development. Some of those participating in this research have begun along this path and are finding the approach useful; others are more reluctant to take up the model because of the uncertainty of the climate in which they operate—the workforce, the shortage of development opportunities and financial constraints.

For public training organisations, such as TAFE institutes, the capacity to adopt workforce development approaches are limited and constrained by the regulatory frameworks within which they operate. Nevertheless, some are able to implement plans to achieve workforce development goals. During the course of this study, some institutes which had been developing their own long-term recruitment strategies lost the power to do so when recruitment was re-centralised in the state training authority. This affects the extent to which they are prepared to invest time, energy and resources in the development of their workforce.

Moreover, TAFE institutes are typically very large organisations and, like other such enterprises, experience difficulties in maintaining a consistent approach across the whole organisation. Both staff and management indicated that the extended lines of communication typical within their organisations meant that the implementation of central strategies and visions was often limited in its effectiveness and applied to varying extents and at a variable pace. In the worst case, implementation can be badly distorted and have very negative effects on the culture and morale of the organisation.

In the smaller, private training organisations, the much greater levels of informality and the higher levels of personal interaction amongst staff and management have meant that, while they typically don't have a formal workforce development strategy, the idea of building, developing and maintaining a workforce that best fits the organisation is an inherent part of how they do business.

All of the TAFE institutes participating in this study have a well-developed 'professional development' system that has, in recent years, begun to take a more prominent role within the organisation. However, most institutes have a much less-developed strategic approach to issues such as recruitment and staff retention. With the exception of their clearly expressed concern about their ageing workforces, it was notable that issues about the appropriate balance of their workforce, skill mixes and similar workforce issues were not generally volunteered as factors shaping institute strategies. Most senior managers still used 'workforce development' as a synonym for 'staff development', suggesting that the broader understanding of workforce development may still take some time to evolve.

The organisations involved in this study were all able to demonstrate good practice in specific program areas (sometimes in many of them), but only one had made a serious attempt to link these within an overall strategic framework (and this was still in its formative stages). All could point to their mission or vision, but none yet had a clearly developed strategy for moving towards that vision.

All the managers interviewed recognised that their staff held the key to their future success. Their challenge now is to establish the mechanisms that will allow that to occur.

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