0085 - The emerging profile of Australian learning and development specialists.

Abstract
The role of learning and development specialists has changed radically in the past twenty years. Previously viewed as a necessary cost in good economic times, L&D professionals have gradually developed an increasingly wide range of specialisms and become key organisational figures as companies increasingly value knowledge generation and innovation as key competitive advantages. This recent study has gathered data from high-level specialists and a broad national member base to build a profile of the current body of L&D professionals.

Key words - Learning development; profession; diversity; networks; business strategy.

Introduction
The past two decades have witnessed significant changes to the way learning and development has been organised, practiced, and viewed. What was previously considered either a pursuit of the elite or a paternalistic venture orchestrated by personnel officers has been reshaped in most developed economies into essential post-compulsory national vocational education systems and a key component of most business strategies. Knowledge and capability is now perceived to underpin the competitive production of most businesses, and is often seen as a core production in itself. The stimulation of innovative practice is viewed as essential for company survival and growth. Learning has moved from a peripheral activity at night school to a collaborative production integrated with the workplace and with work. This has radically changed the quantity of learning activity in evidence, the diversity of learning practices, and the importance and status of those engaged in mediating learning activity. In this paper we seek to improve understanding about how the past two decades have impacted upon the learning and development profession within Australia by modelling the emerging profession.

Our national study explored the perceptions of learning and development specialists across Australia, funded by the Australia Institute of Training and Development and involved a collaborative research team from two States. The purpose of this project was to produce a model of current and potential learning and development (L&D) professionals with a specific focus on practitioner development needs. The study focused on three linked research questions; what were the roles of L&D practitioners; what were the challenges of L&D practitioners, what were the development needs of L&D practitioners. Our assumptions about L&D practitioners were that this group of practitioners were united by common interest in human and organisational change, but that their work settings and roles, the special techniques, knowledge and skills they employ, and their individual levels of experience and dispositions was producing a field of practice that is extremely diverse. The aim of the project was to model both the complexity and diversity of the group and to explore what forms of development would have the greatest utility for such a network. This paper focuses on the first goal of the study, modeling the practitioner diversity. The study progressively shaped a model of the profession through existing knowledge sources, expert commentary and a national survey

of practitioners. This paper outlines the key components of that model that enable the increasing diversity of the profession to be displayed.

Literature review
The first phase of the study was to explore a range of related literature about L&D professionals to assist in building a provisional model of the profession that could be 'tested' out with senior practitioners. This required an investigation of what is classified by practitioners as L&D work, from research on specific L&D challenges, such as leadership development (Buckingham, 2012) through to more comprehensive views of the field (O'Toole, Ferres & Connell, 2011). L&D literature also comes in different guises, from that focused on 'Training' (Buckley & Caple, 2009) and 'Human Resource Development' (Delahaye, 2005) through to 'Organisational Development' (Anderson, 2011). The evolution of L&D complicates the task of describing L&D with a wide range of the labels to describe the work and its practitioners.

Although there is a wide range of views about what L&D work involves, there is convergence on a concern for and interest in change. The evolution of the field suggests that *change in individuals* was initially the primary focus. However, over time, *change in groups and whole organisations* have emerged as a focal L&D concerns (Smith, 2006). L&D work can be viewed through organisation-focused theory (Anderson, 2011) that emphasises dynamic, complex environments and contexts in which practitioners apply their knowledge and skills, or through theories of adult learning that emphasise the specialist knowledge and skills required (Mayson, 2006) to engender learning.

In terms of the contexts of L&D work, differences between organisational settings have the potential to generate diverse challenges for practitioners (Smith & Sadler-Smith, 2006). Price (2007) offers an analysis of the 'dimensions of organisation' that emphasises the impact of *organisational size* on L&D work. In larger organisations, with a longer strategic tradition, there is routine drawing on a wide range of models of L&D to underpin performance, growth and innovation (Price, 2007).

A spectrum of attitudes to L&D practice exist within industry. Some managers seek an integrated approaches to L&D with systematic 'alignment' between organisational goals and work activity, (Nelson & Quick, 2008). Other managers use ad-hoc approaches to L&D using it as an externalised, compliance driven band-aid. Kearns (2004) suggests that an organisational 'maturity' scale applies to these contexts of L&D, with 'reactive' approaches maturing over time towards more 'strategic' approaches. To complicate the situation for L&D practitioners, attitudes to L&D are often inconsistent, localised and conflicting throughout organisations (Sambrook, 2007).

L&D activity is also polarised between context customised approaches and the use of generic systems. Organisations may opt for off-the-shelf systems, or commit to developing customised solutions (Noe, 2010). In Australia a key question for organisations is whether to engage with Nationally Recognised Training (Smith & Smith, 2007), with different industries often following different traditions and practices (Price, 2007; Wilson, 2012). The organisational context of L&D also shapes L&D work by choosing to manage or outsourced development activity (Davis, Naughton & Rothwell, 2004). According to Gibb (2011) the level of outsourcing and 'partnering' for L&D is

increasing. Again, whether the practitioner works alone or as part of a team leads to different demands and challenges (Hytönen, 2002). Increasingly practitioners have been contributing at a strategic level, however training at an operational level is still the core of the industry (Smith, 2006), with a continuum of L&D roles from the strategic learning business partner through to more operational training (Davis, Naughton & Rothwell, 2004). Even 'traditional' roles such as conducting group training have now often diversified with the growth of e-Learning systems and blended delivery platforms (Noe, 2011). More 'people oriented' operational roles have been supplemented with roles focused on technologies to support L&D. L&D roles can be dedicated or may be practiced as part of a line management role at all levels (Price, 2007; Anderson, 2009), or by human resources specialists (Ruona & Gibson, 2004). Smaller organisations and externalised contacts often demand such dual role activity (Hill & Stewart, 2000).

The changing organisational environment has demanded increasingly diverse and contextually relevant learning services. L&D specialists need an increasingly complex personal toolbox, built through education and experience. O'Toole's (2010) argues that they are caught up in an 'identity crisis', of being trainers, organisational developers, HRD managers, and learning strategists, overlapping roles but with distinct applications and knowledges. Aspirational identity also plays a key part in the trajectory of L&D practitioners (Gruen, Pearson & Brennan, 2004), as most L&D practitioners have rich industry backgrounds before coming to L&D (Bartlett, 2003). Their membership of social networks can be a valuable asset (Cross, Abrams & Parker, 2004; Storberg-Walker & Gubbins, 2007), extending the value of their L&D practice. Industry knowledge can be critical in developing the context of L&D practice (Bartlett, 2003; Price, 2007). However, increasingly the awareness of the commercial or business realities facing organisations, or 'business acumen', is becoming an indispensible 'foundational competency' for practitioners (Davis, Naughton & Rothwell, (2004) Communicative competence is likewise a critical attribute for L&D professionals (Nelson & Quick, 2008).

The broad body of knowledge, skills and techniques that are the 'craft' of L&D have increased over time, with few becoming obsolete. Thus the L&D toolbox packs an array of more 'traditional' skills now allied with the use of 'e-Learning' technologies and business negotiation and management (Buckley & Caple, 2009; Werner & DeSimone, 2011; O'Toole, Ferres & Connell, 2011; Wilson, 2012). Many practitioners now have moved on from deficit training models associated with training gaps and cognitive parcels of learning to focus on generating innovation (Smith, 2006; Sadler-Smith, 2009). The systems available for assessment, reporting and evaluation have likewise increased in sophistication, driven by information technology (Fee, 2009). Smith (2006) argues that the emergence of *'learning and development'* in Australia is the result of the convergence of training, career development and organisational development and their connection with business strategy since the 1990s. This expansion into leadership development, and value adding ROI models has generated seats at the top table of business (Garavan, 2000; Kim, 2007; Herman & Kraiger, 2009).

The literature underpinning this study indicates that the field is extremely diverse, and becoming increasingly diverse both in width of skills and in strategic orientation.

Industry type and size determines the broad role played by L&D practitioners with personal biases and capabilities tailoring eventual roles.

Methodology

The research team undertaking the project spanned two universities to bring education and management perspectives to the study, with a Project Steering Committee (PSC) consisting of highly experienced practitioners with national representative roles. Several meetings of the research team and committee took place during the project to agree the focus, research questions, sampling, instrument phases and to validate the instruments and analysis outcomes. While the overall purpose of the project was to produce a model of current and potential learning and development (L&D) professionals, with a specific focus on practitioner development needs, the key research questions were exploring what roles of L&D practitioners played; what challenges they faced; and what development needs they vocalised.

The research was shaped in *four phases*; a literature review to build a provisional model; an exploration of key professional's perspectives; a broad national survey; and finally an analysis of the data gathered that would produce a final report and model for debate and discussion. The first phases of the literature review, drew on research and theory about L&D practice, to build a systematic and comprehensive picture of L&D work. The resulting draft model was reviewed by the PSC and the feedback used as a basis for fine-tuning the model as the basis for the next phase of the study.

In phase two, 16 stakeholders were identified using a recruitment matrix and then interviewed for the project. The matrix was developed with input from the Project Steering Committee, to ensure that interviewees were systematically recruited to represent the diversity of the L&D industry in Australia. The matrix identified key industry and sector categories, and made provision for three 'wildcard' nominations of known non-aligned L&D leaders. The interviews were based on the key research questions but followed an open structure to allow information to be captured that was not anticipated during the development of the schedule. This approach involved identifying critical questions along with optional 'probe' questions with participants assured that their contributions would remain anonymous. Ethical clearances for the study were gained from a Victorian University.

In phase three, an online questionnaire based on the draft model with 99 questions, refined with input from the PSC, was distributed nationally to a purposive sample of over 3,000 participants, who were members of L&D practitioner networks through Survey Monkey, with almost 800 usable responses being returned. The questionnaire included contextual, historical and demographical questions as well as exploring issues of their work skills and work situations. All data collected though the survey was anonymous and designed to validate and refine the emerging modeling of the profession.

Finally in phase four the interview data and survey findings were transcribed, coded and tabulated, to draw out the dominant themes. The responses to the survey items that focused on the components of the emerging model and were used to assess the practicality of the model. Factor analysis was also used to explore the emerging

groupings of practitioners, identifying distinct 'clusters' of tools identified as important by respondents. The emerging strong and enduring themes were explored and debated by four independently operating researchers. A refined version of the model was developed and discussed with the PSC.

Findings

Interviews – phase two

The key stakeholder interviews were conducted with 16 leaders and advanced practitioners in Australian L&D representing a wide range of L&D work types and settings. The interview schedule was divided into two basic areas: four questions about the interviewee's role, development and career, and eight questions about L&D practitioner work and needs more generally. In this section responses to each of the questions will be briefly summarised and then an analysis of common themes relating to L&D work and needs will be presented.

The interviewees were generally in senior positions with wide knowledge of the industry and of other practitioners and described their roles as 'strategic', seeking 'alignment' of people to organisational strategy, while other interviewees operated as consultants. Most of the interviewees had few if any staff reporting directly to them, regardless of level of seniority, with their length of career in L&D ranging from five to twenty-five years, beginning after managerial roles. There was a very wide range of formal qualifications identified from Certificate-level through to post-graduate study.

Most practitioners saw addressing diversity a key challenge – diversity of job roles, individual capabilities, and organisation functions and sites. All interviewees acknowledged that L&D work and careers are diverse. There are specialists and generalists, one-company people and continual contracts, learning managers and trainers. However, business understanding was seen as increasingly critical.

> I think one of the things that true L&D professionals have is that we are able to work in projects across the whole organisation …. how all of these little cogs fit together. (Interviewee 6)

> Where I am now I think one of the key challenges is really understanding the business. (Interviewee 10)

L&D work is often shaped by the capacities and characteristics of individual practitioners:

> So the organisations we work in have to respond faster and have to be more flexible. That means you're going to need some really 'kick-ass' L&D people. But they can't be focussed on one tiny little bit of L&D. (Interviewee 6)

Respondents commented on the diversity of the L&D context.

> I was a line manager in an operational role. I got more involved in learning and change because that was the nature of what was happening, and then moved – then took up university studies because I felt I like this. Then got into an

organisational role, which was primarily around OD, and then finished university studies, got into management roles in that area, then moved outside and then took up professional development, particularly around coaching. (Interviewee 16)

In terms of the individual L&D practitioner, personal networks, industry knowledge, business awareness and learning preferences were critical to their craft:

I often engage with other colleagues I've got that are out there, both in the private sector and the contract or consultancy area, to see what they're up to. ….It's a range of things you do to keep across practice. (Interviewee 14)

…you've got to be able to understand your industry. (Interviewee 1)

The L&D techniques, knowledge, skills now consisted of traditional tools and more recent tools.

you're still going to need to know how to do a needs analysis or a skills forecast (Interviewee 15)

I think that's been another shift has been that from a batch model to an individual model. (Interviewee 10)

The impact of technology and the understanding of personality types and learner characteristics were all highlighted by a majority of the interviewees:

So as I mentioned, like things like the Myers-Briggs testing, and personality profile …. it's about how do we get - understand people better….(Interviewee 3)

I think they will need more of technology-enhanced learning. Definitely…..But also about technology gives you the capacity to do short and sharp. (Interviewee 10)

Tools that have been added to the scope of the L&D practitioner in the wake of the shift toward strategic uses of L&D were described by all of the interviewees:

…the modern L&D manager often is a person who is like a 'broker' within the firm, and usually is not very involved in the actual delivery, but is more involved in setting the strategies around what the company is sort of HRD or learning and development or human capital development, kind of strategies will be, and then basically sourcing that, usually from outside the organisation. (Interviewee 2)

Trying to engage strategically, trying to determine …. return on investment or return on value, or return on expectation. (Interviewee 14)

Survey – phase three

The survey of L&D practitioners was designed to validate and refine the model emerging from the interview responses. A questionnaire included questions designed to gauge the relevance of each of the model components. The model was largely validated by survey and two forms of evidence stand out from this process. First, there were a relatively low

number of 'strongly disagree' and 'disagree' responses to items perceived as 'important' to L&D work. This suggests a broad congruence and confirmation of the emerging model. Second, items that invited respondents to position themselves against the dimensions of the 'practice' returned relatively low levels of 'skipping', again this confirmed congruence. The following paragraphs review the main contributions of the survey data.

The majority of respondents were mature-age female practitioners, in operational positions, many from NSW with 15 years experience, VET sector qualifications but not currently studying. Most respondents worked in smaller organisations and provided their L&D services for only one organisation (61.9%), while others worked across at least 20 organisations a year. Only 7% of practitioners characterised all their work as strategic, but half of the respondents indicated a mixed workload that included strategic approaches. More than half of the respondents were engaged with Nationally Recognised training, while 85% reported engagement with developing L&D resources or programs for unique needs. About 25% of the practitioners delivered proprietary or licensed systems.

A majority (61.2%) reported that their role was 'mainly dedicated to L&D'. The majority of respondents worked in teams (average size 10.5 people). A third of practitioners occupied an 'operational' role, a further third were involved in consultancy work, with less than 20% characterising their work as 'strategic'. Most respondents (71.2%) agreed that developing understanding and undertaking *different types* of L&D work was important. A clear majority of respondents planned to stay in L&D, with most indicating that they would like to further improve their understanding of goal setting and career planning.

Most practitioners agreed that developing networks to support L&D work, increasing their 'business acumen', business knowledge and communicative competence were important issues for professionals. Nearly all the practitioners preferred personal networks, reading L&D literature and formal face-to-face events for professional development. Their learning needs formed three distinct clusters: learning facilitation; learning technologies; business strategy and evaluation. These clusters suggest that L&D specialists display characteristics that enable them to be segmented into very different delivery, design and contract negotiation work roles.

Discussion

The evidence from this field study provides both an emerging practitioner profile and indicates the learning needs of the profession. This paper will focus on the first part of this analysis where the initial modelling from expert practitioner responses produced a draft model of the profession, subsequently reframed by the national survey findings.

The analysis indicated that that the model of L&D practitioners should attempt to display the evident diversity of the profession and indicate the two key factors that shaped this diversity: the context that the practitioners work within; and the capabilities that brought to, developed and exercised in that domain. The visual model is currently the subject of

continued collaborative work with the project sponsor and will be validated and released by May 2013. However, there are specific broad components that will form the basic structure of the model.

Practitioners within the profession are shaped both by the contest within which they work and by the skills that they employ. A model of the profession is therefore based on two main domains: where L&D work was practiced; and what skills and knowledge practitioners applied in the workplace.

The first *Practice Domain,* includes the work setting and work roles that shape L&D practice. Practitioners experience very different work roles with a significant variation between those working for an employer with specific needs and those continually seeking contracts and adapting to diverse industry requirements. Indeed, while some work as part of a team or partnerships, the landscape also encompasses those who forge a living as a lone wolf. Another significant component of this sector of the model is to what extent the practitioner operates at a strategic level, and if their L&D responsibilities are shared with other workplace roles.

The second component of the model is the *Individual Domain*. This includes three components; Personal Sphere (practitioner experience); a Craft Sphere (techniques, knowledge and skills); and an Allied Skills Sphere (Project management, research, marketing and financial skills) that mediate what contribution practitioners may make. Practitioners bring to the role diverse understandings of business imperatives and the ability to align their development activity with business strategy. Similarly, practitioners may have pursued high-level academic study and are able to apply detailed understanding of learning techniques and systems to their work. Finally, the rapid development of technology has brought practitioners who can use multiple delivery platforms into the industry and feel at ease negotiating complex agreements that integrate work and learning for organisations.

Conclusion

The L&D profession has enjoyed significant growth over two decades. The data from this study provides evidence that the L&D profession has both retained traditional skilling roles but is increasingly making a strategic learning contribution within organisations to build knowledge and capability.

> …the whole field has changed over a 20 year period in that previously there were defined lumps of learning which are external and perhaps not very linked, managed by learning organisations. (Interviewee 11)

This model of the profession displays the diversity of the profession and indicates the emerging segmentation of the roles and skills within the network. Learning is still an individual issue, but increasingly is an organisational issues as well. The model indicates the diverse career paths that it is possible to pursue.

> I think if anything….increasingly learning needs are much more individual. There is much more diversity in what different industries want and the roles that specific individuals play….much more variety. (Interviewee 13)

The study indicates the imperative of active networking to build personal learning, business knowledge, and an extensive collaborative business partner network.

> …but I also use other social networks to keep myself informed and to learn from others. So that, I would say actually is the backbone of my personal learning. That's where I do most of my learning. (Interviewee 6)

> Most of my learning today is self-directed or on the job. (Interviewee 15)

Finally the study emphasises that traditional practices are now blended with technology to produce more complex learning models using multiple delivery platforms.

> …we're in a process of introducing a much more blended approach, so we're getting into lots of things like e-Learning, understanding their learning style, what work related or workplace related activities are there that enable them to learn and grow their skills. (Interviewee 10)

The model displays the diversity of a profession that has become a cultural footprint of organisation within Australia.

References

Anderson, J. P. (2011). *International Human Resource Development: Learning, Education and Training for Individuals and Organizations*. London, UK: Kogan Page.

Anderson, V. (2009). Desparately seeking alignment: reflections of senior line managers and HRD executives. *Human Resource Development International, 12* (3), 263-277.

Bartlett, K. R. (2003). Accidental trainers versus HRD professionals. *Human Resource Development Quarterly. 14* (2), 231-234.

Buckingham, M. (2012). *Leadership Development In the Age of The Algorithm*. Harvard Business Review, June, 86-94.

Buckley, R. & Caple, J. (2009). *The Theory and Practice of Training* (6th Ed.). London, UK: Kogan Page.

Cross, R., Abrams, L. & Parker, A. (2004). A relational view of learning. In Connor, M. L. & Clawson, J. G. (Eds.) *Creating a Learning Culture*. Cambridge, UK: Cambridge University Press.

Davis, P., Naughton, J. & Rothwell, W. (2004). New Roles and New Competencies for the Profession. *T+D*, April, 26-36.

Delahaye, B. L. (2005). *Human Resource Development: Adult Learning and Knowledge Management* (2nd Ed.). Milton, QLD: John Wiley & Sons Australia, Ltd.

Dixon, N. M. (2006). Organizational learning: A review of the literature with implications for HRD professionals. *Human Resource Development Quarterly, 3* (1), 29-49.

Fee, K. (2009). *Delivering E-Learning: A Complete Strategy for Design, Application and Assessment*. London, UK: Kogan Page.

Garavan, T. N. (2007). A Strategic Perspective on Human Resource Development. *Advances in Developing Human Resources, 9* (1), 11-30.

Gibb, S. (2011). *Human Resource Development: Foundations, Process, Contexts* (3rd Ed.). London, UK: Palgrave Macmillan.

Gruen, L. R., Pearson, S. D. & Brennan, T. A. (2004) Physician-Citizens – Public Roles and Professional Obligations. *Journal of the American Medical Association, 291* (1), 94-98.

Herman, A. & Kraiger, K. (2009). Benefits of Training and Development for Individuals, Teams, Organizations and Society. *Annual Review of Psychology, 60*, 451-474.

Hill, R. & Stewart, J. (2000). Human resource development in small organizations*. Journal of European Industrial Training, 24* (2), 105-117.

Hytönen, T. (2002). Exploring the Practice of Human Resource Development as a Field of Professional Expertise. *Jyväskylä Studies in Education, Psychology and Social Research, 202*. Jyväskylä, Finland: University of Jyväskylä.

Kearns, P. (2004). From Trainer to Learning Consultant: an evolution. *Training Journal,* January, 42-46.

Kim, S. (2007). Learning goal orientation, formal mentoring, and leadership competence in HRD: A conceptual model. *Journal of European Industrial Training, 31* (3), 181-194.

Mayson, S. (2006). The contribution of current ideas in adult learning to human resource development. In Holland, P. & De Cieri, H. (Eds.) *Contemporary Issues in Human Resource Development: an Australian perspective*. Frenchs Forest, NSW: Pearson Education Australia.

Nelson, D. L. & Quick, J. C. (2008). *Understanding Organizational Behaviour* (3rd Ed.). Mason, OH: Thomson Higher Education.

Noe, R. A. (2010) *Employee Training and Development* (5th Ed.). New York, NY: McGraw-Hill Irwin.

O'Toole, S. (2010). Training, OD, L&D, HRD – What's in a name? *Australian Journal of Adult Learning, 50* (2), 419-426.

O'Toole, S., Ferres, N., & Connell, J. (2011). *People Development, an Inside View: Developing Individuals, Leaders and Organisations*. Prahran, VIC: Tilde University Press.

Price, A. (2007). *Human Resource Management in a Business Context* (3rd Ed.). Hampshire, UK: Cengage Learning.

Ruona, W. E. A. & Gibson, S. K. (2004). The Making of Twenty-First-Century HR: An Analysis of the Convergence of HRM, HRD, and OD. *Human Resource Management, 43* (1), 49-66.

Sadler-Smith, E. (2009). *Learning and Development for Managers*. Oxford, UK: Blackwell Publishing Ltd.

Sambrook, S. (2007). Exploring HRD in two Welsh NHS Trusts: analysing the discursive resources used by senior managers. *Journal of Health Organisation Management. 21* (4-5), 418-431.

Smith, A. (2006). Training, organisational change and the emergence of learning and development. In Holland, P. & De Cieri, H. (Eds.) *Contemporary Issues in Human Resource Development: an Australian perspective*. Frenchs Forest, NSW: Pearson Education Australia.

Smith, A. & Smith, E. (2007). The role of training in the development of human resource management in Australian organisations. *Human Resource Development International. 10* (3), 263-279.

Smith, P. J. & Sadler-Smith, E. (2006). *Learning in Organizations: Complexities and Diversities*. London, UK: Routledge.

Storberg-Walker, J. & Gubbins, C. (2007). Social Networks as a Conceptual and Empirical Tool to Understand and "Do" HRD. *Advances in Developing Human Resources. 9* (3), 291-311.

Watson, S. & Maxwell, G. A. (2007). HRD From a Functionalist Perspective: The Views of Line Managers. *Advances in Developing Human Resources, 9* (1), 31-41.