Performance Improvement in the Piedmont

The Official Newsletter of ISPI Charlotte, Vol. 1, Issue 8

Tips and Tricks for Instructional Development

Three panelists present at December meeting

Join ISPI Charlotte for our December program entitled “Instructional & Performance Support Development Tools, Tricks and Tips.” This program will be a panel discussion facilitated by Chris Adams; Jane Bozarth, Ph.D.; and Josh Cavalier.

Chris Adams is Product Manager for Handshaw, Inc. in Charlotte, NC. As Product Manager, Chris co-invented Handshaw’s content creation and management platform, helping clients use software to improve human performance.

Jane Bozarth is an internationally known trainer, speaker, and author. In addition to her work as eLearning Coordinator for the state of North Carolina, Dr. Bozarth has a longstanding collaborative relationship with InSync Training, LLC, serving as their Social Media Strategist, and writes the popular “Nuts and Bolts” column for Learning Solutions magazine.

Josh “Captain Captivate” Cavalier has been working and teaching in various fields of digital media content creation since 1992. Josh founded Lodestone Digital (then called Interactive Fun), and has presented at numerous industry events including Flash Forward, NAB and the Adobe Learning Summit.

In addition to our panel of speakers, we invite you to share your own ‘tips and tricks’ in our year-end poster session. Register your poster session with Marc Donelson. Also remember that our meeting will begin at 4:30. This event is the final installment in our year-long certificate series.
From the President

Our October meeting addressed one of my favorite topics: evaluation. The topic was expertly covered by one of the country's foremost experts on evaluation, Dr. Rich Pearlstein. Rich, like most of our speakers, values research, so his presentation was based on research and his knowledge learned through experience. Rich's experience is considerable with his development of the ISD Guide for the United States Air Force and three handbooks published, including *Improving Performance in the Workplace.*

I was wondering what Rich was going to say about evaluation, since I myself rarely manage to convince my clients to conduct evaluation. Actually, to be clear, we often conduct formative evaluation but rarely conduct summative evaluation of the type classified by Dr. Kirkpatrick. I learned that Rich also has difficulty convincing clients to spend time or money on summative evaluation. His presentation very cleverly dealt with what Rich sees as the barriers to conducting evaluation. After listening to Rich I have a much greater understanding for why clients may be resisting our efforts to conduct evaluation and a number of strategies for overcoming these obstacles.

Thanks to Guy, I had the great pleasure of spending some time with Rich after the meeting. He thanked us profusely for asking him to visit our chapter in Charlotte. Rich, who was so generous to travel here to offer us the benefit of his work and talents, was extremely gracious and appreciative of our invitation to him.

This is what has struck me after a year of presentations from some of the best individuals our profession has to offer. The willingness of ISPI members to travel and spend their valuable time to share their expertise with us has been remarkable. A great deal of the success of our chapter has depended on the generosity and the talent of our presenters. I can think of no other reason that so many of you would attend our meetings in such large numbers. I don't know if this happens in all professions or in all professional organizations, but I know I'm proud to be associated with this one.

Warmest regards,
Dick
Featured Member Profiles

Each month we will feature a few members as a way to continue our chapter's networking.

Paula Anderson

Place of Employment: Learning and Performance Specialist at Robinson, Bradshaw & Hinson, P.A.

How and when did you get started in the performance improvement field?
My undergraduate degree is in MIS, and one of my earliest projects was to program a purchasing/order entry system. After I was asked to write instructions and train users, I found my passion and have worked in the learning and development field ever since.

What are some of the major clients with whom you have worked OR major projects on which you have worked?
For the almost ten years I was self-employed, my clients included Motorola University, Marriott, Underwriters Laboratories, Home Depot, Duke Energy, local hospitals, and private and public school educators. My current role still includes designing and delivering technical education, but major projects also include developing staff core competencies, conducting skills assessments, developing performance support, and performance gap analysis.

What are the most significant lessons that you have learned about performance improvement?
Understanding the business, knowing that training is not the only intervention and realizing how important management support is for success.

Samantha Burroughs

Place of Employment: Handshaw, Inc.

How and when did you get started in the performance improvement field?
About 2 years ago. Throughout my career, I've taken on the role of trainer with each position I've held. Without knowing it, I was creating training based on performance improvement long before I knew what that was. I looked at the process currently in motion and saw ways to make it faster and more efficient. Thankfully, I had friends and colleagues who were graduates of the IST program at UNC Charlotte. They introduced me to the program; it was a perfect match and the best decision I've ever made.

What are some of the major clients with whom you have worked OR major projects on which you have worked?
Time Warner Cable, EPRI, TIAA-CREF, and KeyBank

What are the most significant lessons that you have learned about performance improvement?
The most significant lesson I've learned is that this field is growing faster than any of us can keep up with. Learning all we can and keeping our minds open to new ideas can only continue to propel our field.
Featured Member Profiles

Gary DePaul

Place of Employment: Lowe’s

How and when did you get started in the performance improvement field?
In graduate school, a professor from the University of Illinois introduced me to performance improvement. At the time, he consulted with the American Academy of Orthopaedic Surgeons and shared how he diagnosed problems with residents’ performance. I found it fascinating how the attending faculty blamed the residents for their poor performance but missed the root cause.

What are some of the major clients with whom you have worked OR major projects on which you have worked?
At Arthur Andersen, I facilitated development work through a global network of trainers. At Johnson Controls, I implemented a knowledge management database for the Learning & Development department. I started a performance improvement department at Fidelity National Information Services. As a senior manager at Ceridian, I directed three groups in the call center and processing areas: the training department, the quality assurance department, and team of knowledge managers. Now at Lowe’s, I’m proud to be part of their Workforce Readiness group in the Learning and Organizational Effectiveness department.

What are the most significant lessons that you have learned about performance improvement?
Probably the hardest discipline in our field is avoiding the temptation to work on solutions before fully understanding the problems. While some have obvious solutions, we often make the same mistakes as our clients by giving into pressures to solve problems without performing our investigative due diligence.

Shannon Godwin

Place of Employment: The Shaw Group

How and when did you get started in the performance improvement field?
I decided to return to school in 2006 when my twins were two years old and my mind was getting very mushy. My life was that of a complete caretaker simplified to baby sounds, diapers, and the Wiggles. The degree I chose was Training and Performance Improvement. I have always had a natural curiosity to make things better and live by the question, “How could I have done that differently?” The program I chose was designed to follow a progression of Human Performance Technology. Each class required mastering Performance Improvement techniques such as Needs Assessment, Interventions, Evaluation, ROI, etc. through the completion of a real time project. I was unemployed, full time care taker without a company to improve so I reached out to my personal network and found companies willing to grant access to their records allowing me to act as a Performance Consultant. Four months ago I started working in the profession and am now a Learning and Development Strategist at the Shaw Group.

What are some of the major clients with whom you have worked OR major projects on which you have worked?
I’m currently working on a mentoring program designed to retain and develop employees.

What are the most significant lessons that you have learned about performance improvement?
Incorporating evaluation into every performance improvement opportunity is a valuable lesson. I’m finding, despite my wildly optimistic outlook, that with some savvy thinking, measurable results can be applied to all situations; the true battle is a time issue. Stakeholders seem incapable of supporting the time for a proper needs analysis to develop the thinking and processes imperative to identifying suitable interventions and thorough evaluations. However, despite this inherent performance issue, I will continue to eat the “evaluation” elephant one bite at a time.
Dear Members:

In our 9/22/2010 email communication to you regarding PayPal issues, we informed you of the difficulty we have experienced trying to coordinate the 3-month Free Membership promo offered in 2009. More specifically, our 9/22 communication stated:

"Last Year I signed up early to get 3 months of membership free but PayPal is charging me the full membership fee in advance of my renewal date. Why?

First, please accept our apology for this problem. When we offered this promotion we did not have a full understanding of how PayPal and our web application Wild Apricot work together. Although Wild Apricot may show the correct renewal date inclusive of your 3 free months, we cannot change the subscription renewal date in PayPal to honor the 3-month free promo. We are determining how best to resolve this manner and will have a solution by the next meeting. Once again, please accept our apology and know that we will honor this promotion."

We have decided that the best way to honor this promotion is to reimburse those eligible members the value of the 3-months of free membership by issuing parking tokens and/or cash reimbursements. Therefore, for all eligible members who paid their 2010 membership dues by September 30, 2009, here are the reimbursement amounts and process.

Reimbursement Amounts:
Regular ($25) Members: One parking token (value = $4) and Cash = $2.25
Faculty/Staff ($10) Members: Cash = $2.50

Reimbursement Process:
The reimbursements listed above will be issued at our December and February meetings. Eligible members should request their reimbursement at the Registration Table upon check-in. All reimbursements recipients will be asked to sign an Acknowledgment of Receipt form for our records.

Thank you in advance for your patience and understanding. We look forward to seeing you at our upcoming meeting.

Sincerely,
Ursula Smith, VP of Finance
ISPI Charlotte
(704) 494-9669

Finance Committee Note

Guy Wallace Speaks at ISPI Chapters

Last month Chapter President-Elect Guy W. Wallace finished his third presentation of the year to other ISPI chapters. Guy conducted a one-day workshop for the Tampa Bay chapter in May and in October presented a one-day workshop for the Kansas City chapter and an evening program for the Hampton Roads chapter.

Guy, a past President of ISPI International and the 2010 recipient of the ISPI Honorary Life Member Award for contributions to both the Society and Human Performance Technology, has presented to NSPI/ISPI chapters 22 times since 1982.

Web Resource

There are a number of valuable online resources available to assist us in our profession. The Work-Learning Research, Inc. website from Dr. Will Thalheimer offers tools and resources to improve performance. Check it out.

Work-Learning Research, Inc.
www.work-learning.com

Many of us who have practiced in the learning and performance improvement fields have seen one model after another that promises to be the end-all, be-all for conducting performance analyses and designing performance interventions. But ultimately, we get our best results when we ground our practice in research-based information.

As an industry-leading consulting company run by Dr. Will Thalheimer, Work-Learning Research aims to improve learning and performance by bridging the gap between academic research and practical application in the field. The Work-Learning Research website will help instructional designers and performance consultants build effective learning and performance solutions by leveraging research-based knowledge.

The website offers a free catalog of research reports and job aids on learning and performance improvement topics. Recent topics include aligning learning and performance contexts, providing learners with feedback, measuring learning results, and situation-based learning.

by John Bailey
Rich Pearlstein: In Review

Rich Pearlstein, former training director for the US Senate, brought an engaging and interactive discussion to the October ISPI meeting.

Rich had many intriguing thoughts, for example:

- Kirkpatrick’s Levels 1 and 2 are for improving design and delivery. Levels 3 and 4 can also inform design but are most powerful for helping you gain organizational support.
- In some cases, rapid learning is correlated with a dislike of the course. Dick Clark at the University of Southern California has established this relationship – the Level 2 data is high, the Level 1 data is low. Learning hurts?
- One common obstacle to evaluation is that your stakeholders may fear the results. Or you might! If you know that training alone will not solve an issue, and no other interventions are being used, you probably don’t want to be measured on the effectiveness of your training transfer.
- He noted that whereas many people ask lots of questions then analyze their data, a better approach is to decide on questions to be answered and then look for the data to answer them.

Rich’s simple confidence in the importance of evaluation was an inspiration. I would bet that many people left the meeting as I did, with a renewed determination to push for better, more complete evaluations for all of our programs.

by Emily Stevens

Bozarth and Bullet Points: Book Review

Jane Bozarth’s Better than Bullet Points: Creating Engaging e-Learning with PowerPoint focuses exclusively on the application of PowerPoint to the creation of online training programs. By providing in-depth guidance, specific instructions, and helpful exercises, the book will enable training practitioners to create effective learning interactions using PowerPoint. Bozarth steps readers through the powerful features of this popular desktop application, covering everything from text to art, animation to interactivity. Provided that the reader owns a copy of PowerPoint, this book will immediately put free real-world tools into the hands of those who need it. The information is practical rather than theoretical and immediately applicable. Most importantly, this book will help make e-learning accessible to those who have previously been excluded from taking advantage of the opportunities e-learning can provide.

Jane Bozarth is the e-learning coordinator for the North Carolina Office of State Personnel’s Human Resource Development Group and has been a training practitioner since 1989. She is a columnist for Training Magazine and has written for numerous publications including Creative Training Techniques Newsletter and the Journal of Educational Technology and Society (review adapted from www.pfeiffer.com).

ISPI Charlotte 2011 Speaker Schedule

Here is your guide to next year’s ISPI Charlotte speakers. Mark your calendars now and plan to attend these meetings that will certainly enhance your own professional development.

<table>
<thead>
<tr>
<th>Date</th>
<th>Presenter</th>
</tr>
</thead>
<tbody>
<tr>
<td>February 10, 2011</td>
<td>Carl Binder</td>
</tr>
<tr>
<td>April 12, 2011</td>
<td>Dr. Louis Csoka, Apex Performance</td>
</tr>
<tr>
<td>June 14, 2011</td>
<td>Margo Murray</td>
</tr>
<tr>
<td>August 11, 2011</td>
<td>Jeanne Farrington, Clare Carey,</td>
</tr>
<tr>
<td></td>
<td>Mary Thomas-Norris</td>
</tr>
<tr>
<td>October 14, 2011</td>
<td>Bill Daniels</td>
</tr>
<tr>
<td>December 8, 2011</td>
<td>TBD</td>
</tr>
</tbody>
</table>

Please register for these meetings online at www.ispicharlotte.org.
Leverage Your Master Performers for a Path to Higher Performance

Guy W. Wallace, President
Certified Performance Technologist
704-746-5126 (mobile) / 704-895-6364 (office)
guy.wallace@eppic.biz
www.eppic.biz

Trust doesn’t come Easily.
Experience doesn’t come Quickly.

Guy’s Client List - From 1982 to Today
Over 60 Clients and over 40 Fortune 500 Firms


As of April 2010. Project Overviews for each are available at www.eppic.biz
Authentic Communication: No Longer An Option.

Courses in Speaking, Presentation Design, Writing, Social Media and Instructional Design
interactauthentically.com

Dick Handshaw
Real Learning. Real Results.

The Results-Based Learning Series
It doesn't cost any more to design learning that gets results - it just works better.

Join Dick Handshaw for this series of half-day workshops at Interact Studio:

Training Request? Ask Questions First – Friday, November 5
Learning Analysis? You Can’t Afford Not To – Friday, January 14
Learning Design: Using a Practical Systems Approach – Friday, March 11
Learning Measurement: Making it Practical and Useful – Friday, May 13

To learn more and register visit: dickhandshawworkshop.eventbrite.com

$95 per workshop. ISPI Members receive $20 off with discount code resultsbased.
ISPI Charlotte Board Members

**Dick Handshaw**
President
president@ispicharlotte.org

**Marc Donelson & Shannon Godwin**
VPs of Programs
programs@ispicharlotte.org

**Ursula Smith**
VP of Finance
finance@ispicharlotte.org

**John Heun & Chris Adams**
VPs of Online Services
online-services@ispicharlotte.org

**Sara Miller & Kim Adams**
VPs of Marketing/Communications
marketing-communications@ispicharlotte.org

**Guy Wallace**
President-Elect
president-elect@ispicharlotte.org

**Heather Fausnaugh & Donna Mattison**
VPs of Membership
membership@ispicharlotte.org

**Andy Tucker & Emily Stevens**
VPs of Publications
publications@ispicharlotte.org

**Richard Hartshorne & Shannon Alpert**
VPs of Academic and Student Services
academic-affairs@ispicharlotte.org

**Michael Bland**
VP at Large
at-large@ispicharlotte.org

---

Training Pros

**Our Partner in Performance Improvement**

Contact Kristin Hagan at 804.353.7007 for your next human performance project.

Go where the Fortune 500 go for highly qualified human performance specialists.

See our video at training-pros.com.