

Best results from company programmes such as new product development, upgrading manufacturing plant or a marketing drive, cannot be expected without correct training and development. The practical guideline and case studies given in this booklet are helpful in the formulation and implementation of employee training and development for Hong Kong companies.

適當的員工培訓及發展對於新產品開發，提升生產力或拓展市場是不可或缺的一大課題。本書所引述的成功例子及卓越模式對香港各機構推行員工發展培訓有莫大裨益及參考價值。

員工的培訓及發展

STAFF TRAINING and DEVELOPMENT

James Duncan Bremner

HKSAR Government Industrial Support Fund Project
"Developing Educational Materials to Encourage and Facilitate Hong Kong Manufacturers for Quality Transformation." (ISF Project no. AF/3/98)

香港特別行政區政府工業支援資助計劃
"開發優質教材以推動香港製造業的優質變革" (編號 AF/3/98)



優質變革系列

Quality Transformation Series
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STAFF TRAINING AND DEVELOPMENT
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員工的培訓及發展

Quality Transformation Series 優質變革系列

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STAFF TRAINING AND DEVELOPMENT

員工的培訓及發展

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quality transformation

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Foreword

堅持全面質量已是現今企業經營管理的基本原則。許多企業借助於此理念來保證和提高它們的成功機會。如果忽視了質量管理的重要性，企業將會承擔極大的經營風險。在新的千年裏，企業必須首先看重那些關係企業成功的關鍵因素。管理者應該為企業制定一個明確的遠景和使命目標，並且充分發揮各層級團體的創造力以使企業立足於競爭日趨激烈和變化不定的全球市場。面對激烈的市場競爭，管理者需要創建一種企業文化以使高質量的商品和服務、有效的經營過程和有能力的人成為企業經營的核心。簡而言之，管理者應該充分瞭解全面質量管理的概念以及實施質量變革的可行方法。

香港政府在一九八九年成立了香港質量保證局來評估和認證那些希望達到ISO9000質量體系標準的企業。如今，已經有幾千家香港企業成功獲得了ISO9000認證，而且更多的企業正在進行評審和認證。ISO9000推動和強化了企業進行不斷改進的理念，並使之成為香港企業在二十一世紀爭取成功和提升競爭力的基礎。

本人很高興知道香港城市大學製造工程及工程管理學系獲得香港特別行政區政府工業支援基金的資助，開發了有助於本地工業界進行質量變革的教育材料。這些材料包括小冊子、錄影和多媒體影像，它們必將有利於本地工業界增強全面質量管理的意識並且更加深刻地理解實現卓越管理的方法和工具。我們十分感謝香港城市大學為完成此專案而做出的努力和貢獻。

伍達倫博士
香港質量保證局主席

Insistence on total quality has become the fundamental principle in business today. Companies are grappling with the concept to ensure and enhance the chance of success for their business. Companies that ignore the importance of quality will put the success of their business enterprise at serious risk. In the new millennium, companies have to focus on the right priorities. Management should lead the company with a clear Vision and Mission and unleash the creative power at all levels of the company to meet the challenges from the ever competitive and changing global market. Faced with ever increasing competition, management needs to create a corporate culture whereby quality products and services, effective business processes and competent well trained people are the key ingredient and must be a key focal point. In short, managers need to understand total quality management concepts and the practical norms to implement quality transformation.

Hong Kong Quality Assurance Agency was established by the Hong Kong Government in 1989 to assess and register companies aspiring to attain the ISO 9000 quality system standards. Since then, thousands of companies have successfully acquired the ISO 9000 certification and many more have initiated the application process. The spirit of the ISO 9000 quality management systems facilitate and emphasise the commitment to continual improvement which has become imperative for Hong Kong companies to strive for success and enhance their competitiveness in the 2000s.

It is of great excitement that the Manufacturing Engineering and Engineering Management Department of City University of Hong Kong has gained the industrial support fund from the HKSAR Government to develop educational materials for the facilitation of such a quality transformation in the local industries. The materials, including booklets, videos and CD-ROMs, will surely increase the local industries' awareness in total quality management and foster a deeper understanding about the methodologies and tools in achieving management excellence. The dedicated efforts and contributions from the City University of Hong Kong in making this project a reality are much appreciated.

Dr. T.L. Ng, JP
Chairman, Hong Kong Quality Assurance Agency

Foreword by the series editor

系列主編序言

優質變革系列

不斷增加的競爭壓力、動蕩不定的商業環境、持續變化的市場需求和日益提高的質量要求使得全球製造業的營運更為複雜。這些壓力迫使製造商集中精力制定可行的策略和戰術以獲得和保持競爭力。香港正在經歷由低成本組裝轉到高附加值製造的重要轉型期。為了成功轉型，香港製造商必須比它們的競爭者更快及更便宜地提供更高質量的產品。實施有效的質量策略和管理是成功的一個關鍵因素。

“優質變革系列”是在香港特別行政區政府工業支援基金支持下所制作的質量推廣和教育材料，其中包括：與質量有關的小冊子、錄像和其他媒體。它的目標是使公司主管明白推行質量提升的重要；介紹現代質量改進工具、模式和方法給香港製造商；和提供香港的最佳質量管理實踐的案例。

隨着這個系列的發行，我們希望能夠鼓勵和促進香港製造商進行優質變革。

錢桂生博士
系列主編

Quality Transformation Series

Global manufacturing competitiveness has been complicated with the accelerating pressures of industrial transformation, dynamic trading conditions, ever-changing market demands and uplifting quality requirements. These pressures have sharpened the industry's focus on developing viable strategies and tactics in gaining and retaining their competitiveness. Hong Kong is now undergoing a critical transformation from low-cost assembly to high-value-added manufacturing. For a successful transformation, Hong Kong manufacturers must provide better quality products faster and cheaper than those of their competitors. Adoption of effective quality strategies and practices is one of the crucial factors for success.

This "Quality Transformation Series" is supported by the HKSAR Government Industrial Support Fund to develop promotional and educational materials, such as booklets, video and other multi-media in quality topics. It aims to make the company executives more aware of their crucial role in leading successful quality transformation in their companies; to introduce modern quality improvement tools and methodologies to Hong Kong manufacturers, and to provide examples of best quality management practices in the Hong Kong environment.

With the launch of this series, we hope to encourage and facilitate Hong Kong manufacturers in making the quality transformation.

Dr. K S Chin
Series Editor

About This Booklet

有關“員工的培訓及發展”一書

此書目的是為有效管理員工培訓及發展提供基礎。經理們閱後應可：

- 知道怎樣說明培訓及發展的重要性及其成本效益
- 有能力有效地管理培訓及發展以符合業務需要
- 評估培訓及發展對業務目標的貢獻

This booklet aims to provide a basis for the effective management of staff training and development. After reading it, managers should be able to:

- Know how to state the importance, cost and benefits of training and development.
- Be able to manage training and development effectively to meet business needs.
- Evaluate the contribution of training and development to business objectives.



Why Train and Develop?

為什麼需要培訓及發展？

The company resource represented by the staff is a major cost (often the most major). In manufacturing it may be 40% of the running cost, whilst in a service company it can be as great as 90%. Neglect of training and development is equivalent to neglect of plant maintenance and will lead to similar disastrous results.

Best results from company programmes such as new product development, upgrading manufacturing plant or a marketing drive, cannot be expected without correct training and development.

Training and development can be driven by company programmes, but it is also necessary to invest in the quality of staff to assure the long-term future of the organisation. The key is to treat the expenditure as an investment. Whilst some benefit will be seen in the short term, the real pay-off will happen in the long run.

The ultimate benefits are obtained when training and development become embedded in the organisation. Pay-back occurs through "synergy" - the sum being greater than the parts. An adaptive organisation is the result, staff being receptive to change programmes and accepting continuous change and improvement.

公司的資源以職員為主，同時他們亦是主要的成本所在(通常是最主要的)。在製造業，他們可能佔運作成本的40%，但在服務業，百分比可大至90%。因此忽略培訓及發展等同忽略廠房的保養，將會引致相類似的災難性結果。

若沒有正確的培訓及發展，公司的計劃，如新產品發展、提升廠房或市場推動力便不可被期望能達致最佳結果。

培訓及發展可由公司計劃推動，但同時亦需投資在職員的素質上以確保機構的長遠將來。重點是視開支為投資。當然有些得益可在短期內看到，但真正的回報將發生在長遠以後。

當培訓及發展逐漸在機構內根深蒂固時，便可獲得最終得益。透過培訓及發展兩者的“互動關係”便可得回所付出的——總的成效大於個別部份所能發揮。培訓及發展的結果是機構具適應性，員工易於接受改變計劃及接納持續改變及改善。

What are Training and Development?

什麼是培訓及發展?

培訓是一個過程，用以協助僱員駕御工作所需的知識、技能和方法或使他們能做得更好。

發展是提昇個人的能力，使他/她在達至機構目標的大前題下可接受更大型的工作。

Training is the process through which an employee is helped to master the knowledge, skills and methods needed to do a job or to do it better.

Development is the upgrading of a person's abilities, so that he or she can take on greater tasks in the interests of the objectives of the organisation.

培訓和發展的價值

The Value of Training and Development

Value to the Organisation

When training and development addresses the needs of the organisation, it will ensure that company initiatives provide real value. In particular it will help to:

- improve the productivity of the staff resource
- maximise return on assets employed
- ensure the success of company initiatives for growth or change
- reduce supervision costs, enabling management to concentrate on improvement
- lead to a more effective organisation structure, with lower staff costs and communication which is more direct and of higher quality
- highlight potential managers
- enable the organisation to become a leader in its sector, through a positive culture and high quality services

Value to the Individual

In an organisation in which staff training and development is embedded, individuals will:

- feel confident and are less stressed
- feel valued, such that they will stay
- become more adaptable and do a more complete job, giving them greater satisfaction
- want to work there. The company will attract the right people and retain them.



給予機構的價值

當培訓及發展是針對機構的需求時，便能確保公司的行動能提供真正的價值，且特別能協助：

- 改善人力資源的生產力
- 在受僱的資產中取得最高回報
- 確保公司為求增長或改變而發動的行動能取得成功
- 減少監管的成本，並讓管理層集中在改善項目上
- 推向一個更有效的組織架構，達至更低的人力資源成本、更直接及更高品質的溝通
- 突顯有潛質的經理
- 透過正面的文化及高品質的服務使機構成為行業中的領導者

給予個人的價值

當員工培訓及發展在機構中根深蒂固時，個人將：

- 感到自信及更少壓力
- 感到有價值因而願意留下來
- 會更具適應性及能做更完整的工作，從而給予他們更大的滿足感
- 希望在這裡工作。公司將會吸引適當的人並留著他們

克服反對意見

以下的說話曾說過多少遍？

- “當錢花掉在培訓後，員工便會離職或被挖走”
- “我們不能承擔員工因出席課程而離開其工作崗位的損失”
- “工作太專業沒有相關的外部培訓，故須依靠在職培訓的經驗”
- “課程太長”
- “員工發展是放置員工在工作間卻又逃避正常地給予薪酬的藉口”
- “聘請適合的人比發展我們現有的人更有效”
- “很多課程都是浪費時間，人們是不會學到任何有用的事”
- “完成課程後的數個星期，人們便已忘記所有學到的”

克服以上看法的答案是利用先進的設計及系統化的方法。

取得最高管理層的承諾

高級管理層的支持是十分重要。人們會跟從最高管理層所展示的熱誠，因此管理層應顯示培訓及發展對達至業務目標的必要性並必須像規劃其他業務般作出規劃。

How many times have the following been said?

- "When money has been spent on training, the staff will leave or be poached."
- "We cannot afford to have staff absent from their work whilst attending courses."
- "The jobs are so specialised that there is no relevant external training. It has to be on-the-job experience."
- "Courses are too long for what you learn."
- "Staff development is an excuse for putting people into a job and not paying them properly."
- "It is more effective to recruit suitable people than to develop our own."
- "Most courses are a waste of time. People don't learn anything useful."
- "A few weeks after going on a course, people have forgotten all they learned."

The answer is to overcome the above by advance planning and a systematic approach.

Get the commitment of top management

Senior management support is vital. People will follow the demonstrated enthusiasm of the top management. Obtain it by showing that training and development is essential to achieve business aims and must be planned like any other part of the business.

Get the backing of middle managers

It is vital to obtain the support and active involvement of managers.

- **Identify** managers whose support you need and what you want them to do.
- **Assess** potential resistance.
- **Prepare** the ground showing managers what the benefits will be to themselves, their team and the organisation.
- Follow up to gain their **commitment** to active support and involvement.
- **Maintain** that commitment by continuing discussion and support.

Treat training and development as a business function

Credibility comes from the capacity to meet perceived needs, with a high quality service.

In line with marketing other services it is essential to:

- find out what the customer wants and needs
- develop "products" to satisfy the customer
- establish costs
- agree how the product is to be delivered
- deliver in line with expectations.

Training and development should make a visible contribution to achievement of company objectives. Feedback should be obtained from "customers" on quality and contribution.

取得中層經理的支持

得到經理的支持及積極參予是十分重要的。

- **確認**你需要那些經理的支持，並指出你希望他們做些什麼。
- **評估**潛在的反抗。
- **預備**展示給經理們看他們、他們的團隊及機構將可得到什麼益處。
- 跟進以獲取他們積極支持及參予的**承諾**。
- 以持續的討論及**支持**維持此承諾。

把培訓及發展視為一種業務功能

信譽是來自以高品質服務滿足所意識的需求的能力。

配合推廣其他服務，必須

- 找出顧客所想的及需要的
- 發展“產品”滿足顧客
- 制定成本
- 協議產品的付運方法
- 付運的產品與期望一致

培訓及發展應對達成公司目標作出有形的貢獻。此外，亦須從“顧客”處獲取在品質及貢獻方面的回饋。

以培訓及發展作為業務過程

培訓及發展的管理是一個循環過程。此循環過程像是一個控制桿配合著達至業務需求的行動，見圖一。

Training and Development as a Business Process

Management of training and development is a cyclical process. The cycle acts as a control loop matching actions to business needs, see Figure 1.



Fig.1 The Training and Development Cycle
圖一 培訓及發展循環

Define Business Needs

This should be limited to the organisation level. The steps are as follows:

1. Define strategic company objectives (taking account of the way the organisation is changing).
2. Identify key skill needs in order to meet those objectives.
3. Relate to current jobs, identifying new or changed jobs.
4. Estimate what the 'gap' between the current and necessary levels is costing the organisation.

The outputs from this part of the cycle are:

1. new or changed job specifications, at the level of overall role and function.
2. budget for training and development resource.

Identify Training and Development Requirements

The next part of the cycle is to identify the gap between the knowledge, skills and attitude currently possessed by employees, and the knowledge, skills and attitude required to meet company objectives. This can be done at various levels:

- Organisational level
- Department or Team level
- Job or Individual level.

Some important preliminary questions are:

- **Is training the answer?**
A person may have reached his/her limit.
- **Is training cost-beneficial?**
Could recruit.
- **Are there sufficient incentives to train?**
Not if the need is low priority.

界定業務需求

這項應限於機構層面，步驟如下：

1. 界定具策略性的公司目標（考慮機構正在轉變的方向）。
2. 確認達至此目標的主要技能需求。
3. 連繫現在的工作，確認新的或已改變的工作。
4. 估計現在與所需層面間有什麼“差距”，而填補這“差距”亦是機構的成本。

按此循環得到的輸出有：

1. 在整體角色及功能層面上，新或已改變的工作規格。
2. 用作培訓及發展的資源預算。

確認培訓及發展需求

整個循環的下一部份是確認現時僱員擁有的知識，技能及看法與達至公司目標所需的知識，技能及看法之間的差距，這是可從不同層面進行：

- 機構層面
- 部門或小組層面
- 工作或個人層面

在進行前有些重要的問題是：

- **培訓是否就是答案？**
個人可能已達至他/她的極限。
- **培訓是否有成本效益？**
可聘請。

- 是否有足夠的推動力作培訓？

沒有，若培訓需求是在較低的優先次序。

- 是否需要分析？

或許已獲悉潛在的培訓需求。

- 工作會否改變？

不要浪費時間分析這方面。

- 個人應否適應工作或工作適應個人？

可適應工作或在工作間調配人手（與評估及發展連繫）。培訓及發展可集中在個人的潛在能力或他的工作角色。

須特別注意所用的分析技術，時間比例及內部職員與外部支援的關係。並須意識到機構內的政治事件及個人性格，以確保任何建議均是實際的及將會完全接收。

部份獲取培訓需求的方法在圖二顯示：

- Is analysis necessary?

There may be an underlying training requirement which is already known.

- Is the job likely to change?

Don't waste time analysing it.

- Should the person be adapted to the job or the job to person?

Could adapt jobs or move people between jobs. (Link to appraisals and Development). Training and development can focus on the person's inherent abilities, or his job role.

Particular attention should be paid to the analysis techniques to be used, time-scales, the role of internal staff and external support. Awareness should be shown of political issues and matters of personality in the organisation, to ensure that any recommendations are realistic and will be well received.

Some approaches to the derivation of training needs are given in Figure 2.

方法	何時使用
<p>全面性</p> <p>細查工作的每一部份</p> <p>以目標、頻率及標準界定職位內的每一工作</p> <p>抽取所需的知識技能及看法</p>	職位層面
<p>以能力為基礎</p> <p>目的是確認產生有效表現是需要什麼</p> <ul style="list-style-type: none"> - 制定有關工作角色的聲明 - 把角色細分為數個能力範圍 - 為有效的工作表現界定能力層面 - 制定量度能力的準則 - 與僱員特質比較以強調所缺乏的能力 	若你的機構快速地改變，見7.2. 個人層面
<p>主要工作</p> <p>分析以有效表現作為表現關鍵的工作</p> <p>可使用全面性或以能力為基礎的方法</p>	小組層面
<p>以問題為中心</p> <p>集中界定需要以培訓作為解決方法的問題</p> <ul style="list-style-type: none"> - 確認問題的性質及原因 - 確認處理時所需的技能、知識及看法 	機構層面 部門層面

圖二 培訓需求分析方法

Approach	When to Use
<p>Comprehensive</p> <p>Detailed examination of every aspect of the job.</p> <ul style="list-style-type: none"> - define each task in the job in terms of its objectives, frequency and standard; - derive the needed knowledge, skills and attitude and compare with the employee's attributes. 	Job level.
<p>Competency-Based</p> <p>The aim is to identify what is needed to produce effective performance.</p> <ul style="list-style-type: none"> - produce a statement of the job role; - breakdown role into areas of competence; - define levels of competencies for effective job performance; - produce criteria for measuring competence; - compare with employee attributes to highlight deficient competencies 	If your organisation is changing rapidly, see 7.2. Individual level.
<p>Key Task</p> <p>Analyses those tasks the effective performance of which is critical to performance.</p> <p>Can be done via either of the Comprehensive or Competency-Based approaches.</p>	Team level.
<p>Problem-Centred</p> <p>Focuses on defining problems requiring training solution.</p> <ul style="list-style-type: none"> - identify nature and causes of problems; - identify skills, knowledge, attitudes needed to cope. 	Organisation level Department level

Fig.2 Approaches to the Derivation of Training Needs

The output from this part of the cycle are:

1. Job Descriptions
2. Training and Development Requirements.

此循環部份得出的輸出是：

1. 工作描述
2. 培訓及發展要求

建立行動計劃

下一步是評估另一個能符合已確認要求的方法，並草擬培訓及發展計劃。

圖三顯示機構、小組或個人層面內的培訓及發展計劃必須的要素以符合各層面內所確認的要求。

步驟	如何做
訂立目標	訂立清晰的整體目標 界定所需的表現，有關的情況及標準
決定方法	選擇較可取的培訓項目 決定是內部或外部培訓
委派責任	- 為確定行動已進行 - 為提供培訓/發展 詳細指示外部培訓者
制定培訓計劃	排列學習事項的優先次序 應用預算限制 設定時間表
決定怎樣評估	事前界定量度有效性的方法及採用方法的時段
傳達結果	相對於設計的層面： 機構，小組，個人

圖三 培訓及發展計劃

此循環部份得出的輸出是：

1. 培訓及發展計劃

Create an Action Plan

The next step is to assess alternative ways in which the identified requirements can be met, and to draw up training and development plans.

Figure 3 shows the essential elements of training and development planning which could be at the level of the organisation, team or individual, to correspond to the level at which requirements were identified.

Step	How to do it
Set objectives	Set clear overall aims. Define desired performance, associated conditions and standard.
Determine method	Select preferred training options. Decide whether internal or external.
Assign responsibility	- for ensuring action is taken. - for provision of training/development. Brief the external trainers.
Create a training plan	Prioritise learning events. Apply budgetary constraints. Set time-scale.
Decide how to evaluate	Define measures of effectiveness, and time-scales over which to apply them, in advance
Communicate results	At the level corresponding to the planning: organisation, team, individual.

Fig.3 Training and Development Planning

The output from this part of the cycle is:

1. Training and Development plans.

Design and Deliver

The starting point for the design of training is definition of the learning objectives. This will specify what the trainee should be able to do which could not be done at the start. The following should be stated:

- the required behaviour
- the performance standards which the learners are expected to reach
- the conditions under which they are to perform

Example: a learning objective for training on the writing of job descriptions:

"To draw up a job description for a team leader *[behaviour]*
within 1 hour, covering all aspects of the job, *[performance standards]*
defining key competencies and consistent with all company policies;
draft notes following interview of job-holder to be *[conditions]*
provided, job description to be prepared using a word processor.

Define development objectives (the "destination")

What outcomes are desirable?

What differences will there be when the learners reach their destination?

What will they be doing differently?

How will you measure the changes?

Design the learning processes (the "route")

Break-down the development objectives into knowledge, skill and attitude elements. Attitude elements may be further broken down into behaviour (apparent) and values (less apparent). Include the contribution of the learner's manager, to include briefing, debriefing, and on-the-job reinforcement.

Design the Evaluation

Questionnaires or tests are best designed at the starting-point. Design tests to measure what has been learned. Consider monitoring a "control" group.

設計及傳達

設計培訓課程的起點是界定學習目標。這是具體說明有什麼是受訓者在最初未能做到，在接受培訓後應能做到的。以下是應說明的項目：

- 所需的行為
- 期望學習者達到的表現標準
- 他們表現時的情況

舉例：以編寫工作細則作為培訓學習

"在一小時內草擬作為一位 *[行為]*
小組領導(目標)的工作細則， *[表現標準]*
細則包括工作的各方面，
界定主要的技能及與公司所有政策一致，
在面見有關工作人仕後草擬 *[情況]*
筆記，以文書處理器預備
工作細則。

界定發展目標 ("終點")

最渴求是什麼結果?

當學習者到達終點時會有什麼分別?

他們的做法有什麼不同?

你怎樣量度改變?

設計學習過程 ("路線")

把發展目標細分為知識、技能及看法要素。看法要素亦可再細分為行為(明顯的)及價值(較不明顯)。這裡包括學習者經理的貢獻，即詳細指示，查詢執行情況及加強在職培訓方面的貢獻。

設計評估

在起點時最好已設計問卷及測驗。設計測驗以量度所學習到的。此外亦可考慮監察一"控制"小組。

選擇傳達方法

傳達方法的範例顯示在圖四。

此循環部份得出的輸出：

- (1) 培訓/發展課程或活動及其已計劃的評估
- (2) 已完成計劃培訓或發展“路線”，或在培訓中途的受訓者

傳達方法	培訓	發展
輔導、顧問、諮詢	✓	✓
同輩支持		✓
工作轉換、調任	✓	✓
工作夥伴 / 小組，探訪		✓
展示 / 指示	✓	
公開 / 遙距學習		✓
管理項目		✓
自我發展 / 持續專業發展		✓
培訓事項，外聘導師於公司	✓	
內學習或出外學習		
短而正式的課程、會議、研討會、講課	✓	✓
代表團		✓
以學院為基礎的培訓	✓	✓

圖四 培訓及發展方法

應用已學習到的

應用或加強的學習包括：

- 生產線經理的對執行情況查詢
- 確認個人及聯合行動使學習能在工作中的根深蒂固
- 經理給予學習者鼓勵
- 把學習擴展至同事

此循環部份的輸出是：

1. 已開始使用培訓及發展的受訓者

Select a Method of Delivery

Examples of methods of delivery are shown in Figure 4.

The outputs from this part of the cycle are:

- (1) training/development courses or activities and their planned evaluation,
- (2) trainees who have completed the planned training or development "route", or are "en-route".

Delivery Method	Training	Development
Coaching, Mentoring, Counselling	✓	✓
Peer support		✓
Job rotation, Secondment	✓	✓
Working parties/groups, visits		✓
Demonstration/instruction	✓	
Open/distance learning		✓
Managing projects		✓
Self-development / Continuing		✓
Professional Development	✓	
Training events, in-house or "away-days"		
Short formal courses, conferences, seminars, lectures.	✓	✓
Delegation		✓
College-based training	✓	✓

Fig.4 Training and Development Methods

Use What Has Been Learned

Use and reinforce learning including:

- line manager debriefing
- identification of individual and joint actions to embed learning at work
- encouragement of learner by manager
- spread of learning to colleagues

The output from this part of the cycle is:

1. trainees who have started to use the training or development.

Evaluate

There should be a real understanding of the costs and benefits of training and development by management. Managers should be able to answer the question: "is our commitment to training and development worthwhile?" Senior management should be making informed judgements on future training and development based on an understanding of costs and benefits. The impact of development should be made clear such that it gains credibility, and increases its effect on the organisation.

Evaluation is the last stage in the training cycle. This involves obtaining and analysing of information on the effect of training and development, in order to assess its value. The actual results of training and development activities are compared to the planned outcomes. Training and development activities can thereby be made more effective, to meet current and future business objectives.

There are a number of 'levels' of evaluation which can be summed up by the questions:

- Level 1 - What was thought/felt about the training and development? (Reaction level)
- Level 2 - What was learned?
- Level 3 - What was the effect on job performance?
- Level 4 - What was the effect on organisational performance?

Levels 1 and 2: Immediate impact of training and development on knowledge, skills and attitudes

Learning is a key measure of design and delivery effectiveness and should be evaluated. Common methods for doing this are post-activity questionnaires, tests, demonstrations of skills acquired and follow-up discussions. The method should be based on the objectives set for improving knowledge, skills and attitude.

評估

管理層對培訓及發展的成本效益應有真正的瞭解。經理們應能回答以下的問題“我們對培訓及發展的承諾是否值得呢？”因此，高級管理層應根據對成本效益的瞭解為日後的培訓及發展作出有見地的判斷。如發展可令機構得到良好的信譽及在機構內增加其影響性，應把它帶來的效應作清晰說明。

評估是培訓循環的最後階段，這包括取得影響培訓及發展的資料並加以分析從而評估其價值。以培訓及發展活動的真正結果與計劃結果相比較便可令培訓及發展活動更有效地達至機構現時及日後的業務目標。

以下是數個概括評估“程度”的問題：

- 程度一 - 對培訓及發展的想法 / 感覺 (反應程度)是什麼?
- 程度二 - 學習到什麼?
- 程度三 - 對工作表現有什麼影響?
- 程度四 - 對機構表現有什麼影響?

程度一及二：培訓及發展在知識、技能及看法上的即時影響

學習是量度設計及傳達有效性的主要方法，因此應對學習進行評估。一般的方法是填寫活動後的問卷調查、進行測試、展示獲得的技能及進行跟進討論。所採納的方法應根據設定改善知識、技能及看法的目標。

程度三：對工作表現的影響

表現反映在新的看法及新知識和技能的應用。一般評估表現的技巧是評定、觀察、顧客回饋/調查、職員調查及根據主要量度表現



方法監察結果。評估應是根據訂定的改善表現目標而作出，同時亦應檢查學習是否轉化到已改善的工作表現。

程度四：對機構的影響
機構評估培訓及發展對達至業務目標的貢獻是十分重要的。下列是必須回答的問題。

- 培訓及發展對機構目標的整體貢獻是什麼？
- 機構的所有培訓及發展需要是否均已達到？

無論對內或對外，考慮所有成本、效益及結果，嘗試從可變因素中孤立培訓及發展的影響。把學習到的轉化至業務計劃。而高層次的量度方式可從，如顧客回饋、市場研究、生產報告及職員和顧客態度調查中得到。

此層次的評估及機構表現檢討應每年最少進行一次。無論如何，有足夠的時間讓得益逐漸明顯是極之重要的。

Level 3: Impact on job performance

Performance reflects new attitudes and the application of new knowledge and skills. Common techniques for assessing performance are appraisal, observation, customer feedback/surveys, staff surveys and monitoring results against key performance measures. Evaluation should be based on the objectives set for improving performance. There should be checks on whether learning translates into improved job performance.

Level 4: Impact on the organisation

It is vital that the organisation evaluates the contribution of training and development to hitting its business targets. The following questions should be answered.

- What is the total contribution of training and development towards the organisation's targets?
- Were all the training and development needs of the organisation met?

Take into account all costs, benefits and outcomes whether internal or external. Try to isolate the effects of the training and development from other variables. Feed the lessons learned back to the business plan. Top-level measurements may be obtained, for example, from customer feedback, market research, production reports, and attitude surveys of staff and customers.

Evaluation at this level should take place at least annually in conjunction with a review of organisational performance. However, it is extremely important to allow sufficient time-scale for benefits to become apparent.

Practice

The Practice of Training and Development

培訓及發展的實踐

Integrating with the Business

Essential Steps

Set an Expectation of Results!

It should be made clear that the underlying reason for commitment to training and development is that it is expected to give good returns on the time and money invested. For example, Training will be provided for specific situations giving initial rapid returns, whilst development is more structural with returns taking longer but being more permanent.

Plan Training and Development as Part of the Business

Training and development must be integrated with business strategy for maximum effect in taking the organisation forward. Linked to the business plan is the development strategy containing the training and development policy. This drives the company training and development plan, from which departmental and individual plans are derived. Figure 5 illustrates such integration.

與業務結合

必須步驟

訂定期望的結果

必須清晰地表明對培訓及發展承諾的基本原因是期望所投資的時間及金錢帶來良好的回報。例如，培訓是為能提供快速回報的特別情況而安排，至於發展則是較具結構性，回報需待較長的時間但較持久。

計劃培訓及發展作為業務的一部份

培訓及發展必須結合在業務策略內以便帶領公司向前邁進時能取得最高效應。與業務計劃連繫著的是包含培訓及發展政策的發展策略，這亦推動公司的培訓及發展計劃從而得出部門及個人計劃。圖五展示了這種結合。



Fig.5 Linking of Training and Development to Business Strategy
圖五 培訓與發展連繫至業務策略



發展至一個系統

管理培訓及發展系統的範例有英國國家標準 "Investors in People"。它需要一個有計劃的員工發展方法，透過制定業務目標，與員工溝通目標及投資在與目標一致的員工發展上而得出。此標準的獎勵是根據下列的大前提：

- 一個成功的機構對培訓及發展予以承諾並以具結構性的方法發展其員工
- 存在著一個與計劃一致的系統化計劃及行動
- 根據機構計劃內清晰的目標，評估已採取的發展行動的影響

僱員發展被推廣為政策內不可或缺的部份。

正式委派培訓及發展責任為工作的一部份，培訓及發展責任應包括在工作界定政策內，如：

- **行政首長/董事 (或同等級)**
 - 整體責任
- **經理**
 - 評估，發展及支持個人及小組
- **人事/培訓 (如適用)**
 - 資訊，建議，程序，審核
- **所有僱員**
 - 個人發展
- **培訓及發展小組**
 - 支持，熱誠，溝通
- **工會/員工代表 (如適用)**
 - 支持

與培訓專家不同，經理及員工的責任必須清晰。經理的責任是有相關的目標用作評估。可成立擁有各部門代表甚至是包括工會成員的培訓小組以便為管理部門層面的培訓及發展作出貢獻。

Work to a System

An example of a system for management of Training and Development is the "Investors in People" UK national standard. It requires a planned approach to staff development based on setting business objectives, communicating them to staff and investing in staff development in line with the objectives. The award is based on the following premises:

- a successful organisation develops its people in a structured way in which there is commitment to training and development;
- there is systematic planning and action takes place in line with the plans;
- the effects of development actions taken are evaluated against clear objectives set out in the organisation's plans.

Employee development is promoted as an integral and essential part of strategy.

Assign Training and Development Responsibilities Formally to Jobs

Responsibility for training and development should be included in the job definition scheme, for example:

- **Chief Executive/Directors (or equivalent)**
 - overall responsibility
- **Managers**
 - appraisal, developing and supporting individuals and teams
- **Personnel/Training (if applicable)**
 - information, advice, procedures, auditing
- **All employees**
 - self-development
- **Training and development group**
 - support, enthusiasm, communication
- **Trade Union/Staff representatives (if applicable)**
 - support.

The responsibilities of managers and staff, as opposed to training specialists, must be clear. Managers' responsibilities should have corresponding objectives against which they are appraised. Training groups with representatives from each department (and possibly labour unions) can be set up to contribute to the management of training and development at departmental level.

Make a Definite Choice of Budget

The four main budget alternatives are:

- budget held centrally
- budget held by department budget managers with no central budget
- a combination of central and departmental budgets.
- no budget, i.e. assess each application on its merits

The budget may be incremental or zero-based. An incremental budget is based on an adjusted version of the previous year's budget. A zero-based budget is based on a fresh assessment of the resources needed for the current year.

Monitor the Results of Training and Development

Many organisations monitor results against plan, for example concentrating on key performance indicators. Leading organisations specifically include training and development measures, thus enabling the effect of training initiatives to be seen. A set of measures of this type constitutes a **balanced scorecard**.

Balanced Scorecard

A Balanced Scorecard contains a blend of financial and non-financial measures focused on the company mission and values, and relating to long-term competitiveness.

It covers the following:

- financial and business - volume/growth; new business; sales
- internal processes - quality; efficiency; productivity; teamwork
- customers - level of customer satisfaction; relationships; perceptions
- employees - staff attitudes; training and development; communication.

The benefits of the Balanced Scorecard approach are:

- relates performance to mission, values and business objectives
- gives an understanding of what has been achieved at the expense of something else
- specifically measures the effectiveness of the employees
- enables identification of training and development needs related to the measures.

對預算作出一個果斷的選擇

四個主要的預算選擇是：

- 由中央掌管預算
- 預算由部門經理負責，不設中央預算
- 合併中央及部門預算
- 不設預算，即根據每個應用方法的優點作出評估

預算可以是遞進式或是由零開始。遞進式是根據上年度的預算再作調整，由零開始則是根據現年所需的資源重新評估。

監察培訓及發展結果

很多機構根據計劃監察結果，例如集中在表現指標。具領導地位的機構特別把培訓及發展方法包括在內以便突顯發動培訓的效應，這套方法構成一個平衡積分卡。

平衡積分卡

一個平衡積分卡包括一組集中於公司使命和價值，及與長期競爭有關的財務性及非財務性量度方法。

它涵蓋下列各項：

- 財務及業務 - 數量/增長；新業務；銷售
- 內部運作過程 - 品質、效率、生產力、合作性
- 顧客 - 顧客滿足的程度；關係；看法
- 僱員 - 員工的態度、培訓及發展；溝通

平衡積分卡的好處是：

- 把表現連繫著使命、價值及業務目標
- 瞭解到犧牲某些東西後可得到些什麼
- 可特別量度僱員的效率
- 可把培訓及發展需求確認連繫量度方法

管理層責任

發展公司的管理層

有效的管理層對成功是十分重要的。機構應給予經理發展技能、知識及看法的機會，讓他們為機構的目標貢獻所有潛在的能力。

舉例：摘錄自一個典型的管理發展政策

公司將：

- 建立一個所有經理均會為業務目標作出貢獻的環境
- 分配責任讓決定能在適當的層面及於進行時最接近有關的運作
- 決定工作角色及責任、目標及期望的結果，把它們與獎勵制度連繫
- 根據期望的結果，包括檢討及發展技能與表現，評估所有經理
- 評估長遠發展的潛質
- 進行持續性計劃
- 鼓勵及培訓經理發展他們的小組

進行自我發展

經理們應如與所有專家一樣應肩負部份個人責任以計劃，紀錄及評估他們的自我發展時。在參予持續專業發展時，經理應自我提問下列問題：

- 我身在何處及我想處身那裡？
- 什麼是我的個人差距？
- 我可如何填補當中的差距？
- 我如何把所學到的付諸實行？

困難及解決方法

缺乏高層的支持

高級管理層對培訓及發展的承諾及支持是十分重要的。高級管理層應定期制定與業務計劃及定期進度檢討相符的培訓及發展策略。支持可以是內部，如經“錦標賽”或培訓小組；或外部，如透過培訓機構和網絡系統。

Management Responsibilities

Develop Management in the Company

Effective management is vital to success. The organisation should provide opportunities for managers to develop skills, knowledge, and attitudes so that they reach full potential to contribute to the objectives of the organisation.

Example: Extract from a typical company management development policy:

The company will:

- create an environment in which all managers contribute to business objectives
- allocate responsibility so that decisions are taken at the appropriate level as close to operations as possible
- determine job roles and responsibilities, objectives and results expected. Link to reward systems.
- appraise all managers against expected results including reviewing and developing skills and performance
- assessment of potential for long-term development
- conduct succession planning
- encourage and train managers to develop their teams.

Undertake Self Development

Managers, as with all professionals, should take some personal responsibility in planning, recording and evaluating their self-development. Some of the questions managers should ask themselves in connection with this Continuing Professional Development are:

- Where am I now and where do I want to be?
- What are my personal gaps?
- How can I address the gaps?
- How do I put the learning into effect?

Difficulties and Solutions

Lack of Top-Level Support

It is vital to have senior management commitment and support for training and development. Senior management should set the training

and development strategy in line with the business plan and review progress at frequent intervals. Support may be both internal, via "champions" or a training group, and external, for example from training organisations and via networking.

Continual Change in the Organisation

Rapid pace of change in the alignment of the organisation to its markets, or in its operations, can tend to render training and development ineffective. However, in these circumstances it is vital that training and development are executed in line with business changes. Without this, the benefits of the changes are unlikely to be fully realised. It also provides a positive framework to assist employees working through the development aspects of organisational change.

Poor Business Planning

Training and Development cannot be linked to the business plan if one does not exist! If planning processes are poor, they must be improved, e.g. by internal work or with assistance from external consultants.

Identifying Requirements

Competency-Based Approach

Traditionally, training requirements are determined by comparison of the demands of jobs (as defined in the Job Description) with the abilities of employees. The results of this approach are pure training requirements. Development has to be concerned with employees' underlying abilities and aspirations, that is with their competencies.

It is vital that today's rapidly changing organisation defines how organisational performance is supported by staff competence. This requires:

- a vision for the organisation
- a clear view of how training and development can help achieve this vision
- a clear business strategy and objectives
- a clear view of how competencies link to the vision, strategy and objectives
- the ability to measure results.

在機構內的持續改變

機構為配合市場或在運作上的快速改變步伐可引致培訓及發展失效。無論如何，在這些情況下，最重要是培訓及發展的執行與業務改變是一致的。

否則，改變帶來的得益是不會全面實現。此外，培訓及發展亦提供一個正面的架構協助僱員從事機構改變的發展。

差劣的業務計劃

若業務計劃根本不存在，則培訓及發展是不可與之連繫。若計劃過程是差劣的便必須改善，如改善內部工作或尋求外間顧問的協助。

確認要求

以能力為本的方法

傳統上，培訓要求是經工作要求(於工作描述中界定)與僱員能力比較後而決定。此方法的結果是得出純粹的培訓要求。

發展是與僱員的潛在能力及期望有關，同時亦涉及其工作能力。

最重要的是現今快速地轉變的機構界定其表現如何由員工的能力支持。這是需要：

- 機構有遠見
- 對協助達至這遠見的培訓及發展有一清晰的觀點
- 有清晰的業務策略及目標
- 對於如何把能力與遠見、策略及目標連繫有一清晰的觀點
- 量度結果的能力

在任何已有的工作均是結合著技能、知識、看法及行為，分別在於高級至一般表現。它們整體被界定為能力，亦同時界定了工作持有人需精於那方面以便有效地工作。能力可以數個程度描述。

例子

“有效的溝通者”其能將開始自

程度1: 當有些不清時作出詢問；
清晰及精確地回答與工作有關的查詢；

至

程度5: 適當地發表全面、敏感或保密的資料；有效地傳達至外部組別，包括大眾傳播媒體及股東以推廣機構。

In any given job, there is a cluster of skills, knowledge, attitudes and behaviour which distinguishes superior from average performance. These are defined collectively as Competencies, and define what the job holder needs to be good at in order to be effective in the job. Competencies may be described in terms of a number of levels.

Example

The competency "Effective Communicator" will run from

level 1: asks when something is not clear;
answers factual queries relating to the work clearly and concisely;

to

level 5: presents complex, sensitive or confidential information appropriately; communicates effectively to external groups including the media and shareholders in a way which promotes the organisation.

一個以能力為本的架構是綜合已確認的能力及每份工作所需的能力程度。很多機構會根據其工作的特別要求制定自己的能力架構。

機構亦會採用以能力為本的國家職業資格(如英國的NVQs/SVQs)以協助設計附有評估學習的全面培訓課程。

若能力架構與根據有關能力的表現評估組合，便為下列提供一個有效的基礎：

- 招聘
- 培訓需求分析
- 工作計劃
- 員工升遷
- 表現管理
- 評估及發展中心
- 潛質評估及持續管理

A competency framework summarises identified competencies and the levels of each demanded for each job. Many organisations have tailor-made their own competency frameworks based on the specific requirements of the jobs within the organisation.

Organisations are also using the competency-based national vocational qualifications (e.g. NVQs/SVQs in the UK) to assist in the design of comprehensive training programmes with assessed learning.

If a competency framework is combined with performance assessment against those competencies, this gives an effective basis for the following:

- recruitment
- training needs analysis
- career planning
- staff promotion
- performance management
- assessment and development centres
- assessment of potential and succession management.

Competency development is a gradual process, requiring development of underlying behaviour and characteristics. Stages in improving the performance of an individual via a competency-based approach are:

1. identify competencies - determine which competencies are key to the role, and the level of competence required;
2. identify the gap - assess any shortfalls in performance in these competencies
3. prioritise needs - decide which 2 or 3 competencies to work on over a 6 to 12 month period

The benefits for the organisation of a competency-based approach are:

- identifies the underlying attitude, behaviour and ability that contributes to outstanding performance
- the levels provide a consistent measure to assess performance
- allows recruitment, development and performance management to be carried out against a known standard
- links training and development to the vision for the business.

能力發展是一個漸進的過程，需待潛在的行為及特質發展才可。透過能力為本的方法改善個人表現的階段如下：

1. 確認能力 - 決定對角色最主要的能力及所需的能力程度
2. 確認差距 - 評估在這些能力中任何表現不足之處
3. 對需求排序 - 決定在未來六至十二個月的工作會使用那兩至三項能力

能力為本的方法對機構益處是：

- 確認對傑出表現作出貢獻的潛在看法、態度及能力
- 提供用作表現的一致方法
- 讓招聘、發展及表現管理根據已知的標準運作
- 以業務需要釐定培訓及發展



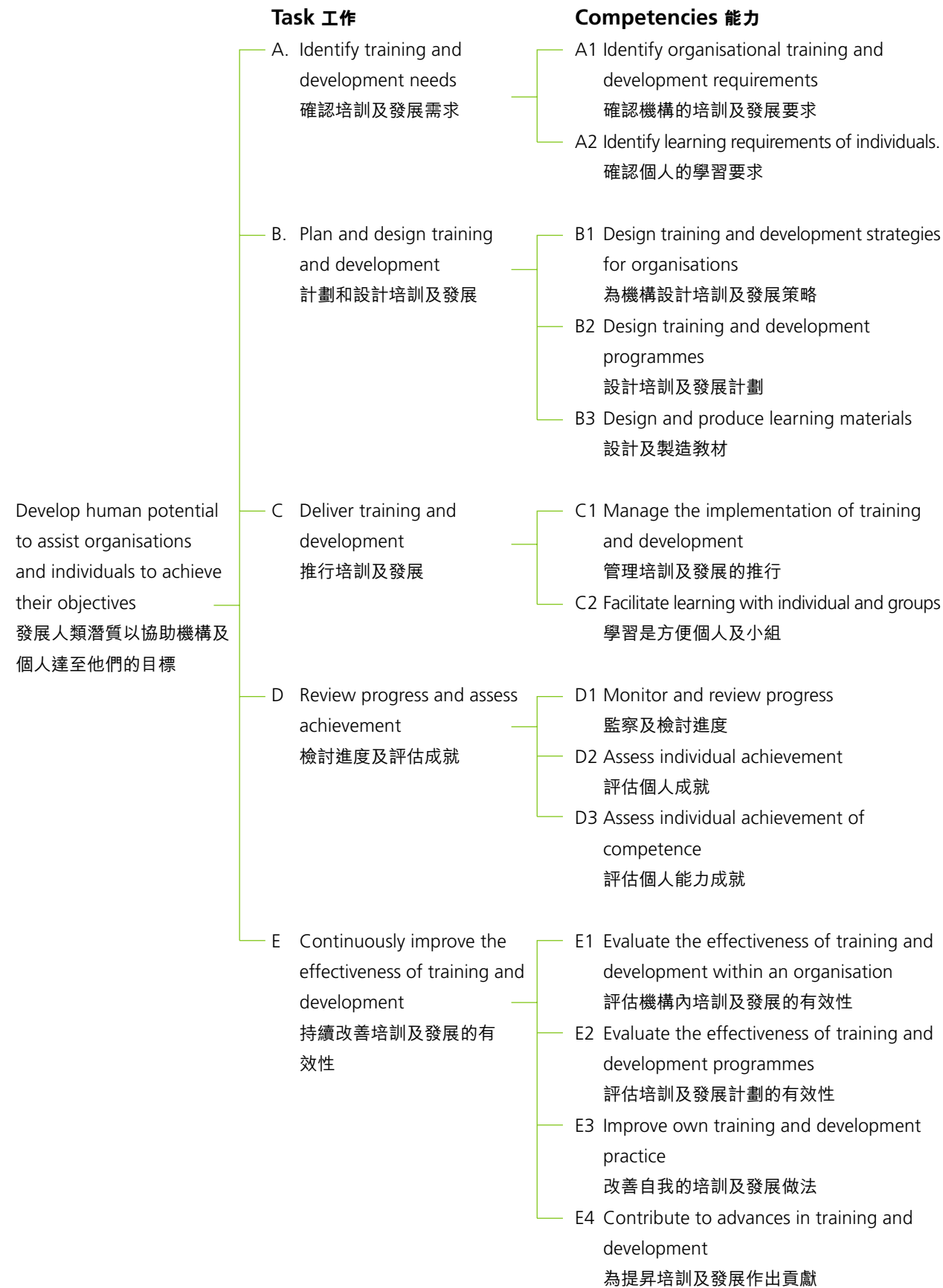


Fig.6 Training and Development Vocational Standard
圖六 培訓及發展職業標準

Training and development itself is also covered by vocational standards. One such competency-based standard relates to the systematic training cycle (see Figure 1), and is shown in Figure 6.

Management Responsibilities

Define Expectations

It is management's responsibility to define the tasks comprising a job, and to communicate this to the employee. This is an essential basis for performance assessment and the derivation of training needs. If the approach includes definition of competencies, it will also contribute development needs. Such job descriptions should, of course, be regularly updated.

Induction

There should be an effective induction for people joining the organisation and people in new jobs. The aim is to facilitate their working in the new role, working environment and culture. It is necessary to allow for the skills and knowledge employees already have, and what they need to know if they are new to the organisation.

Effective initial job related training should be given to new people. People changing jobs should be given appropriate induction to their new responsibilities and any training and development needed for their new role. Poor induction often leads to poor performance and high staff turnover.

Compile Staff Personal Development Plans

In writing Personal Development Plans managers should consider:

- the job description and each job objective, thinking about any performance standards which are not being reached;
- other development needs related to the aims of the organisation or to personal needs;
- the future. Are there any development needs associated with the longer term for example potential job changes? Building them into a rolling development plan will ensure smooth transition later;

培訓及發展本身亦包括在職業標準內。此類能力為本標準與系統化培訓循環是相關，並顯示於圖六。(見圖一)

管理層責任

界定期望

界定職位內包括的工作及把有關職責傳達給僱員是管理層的責任。這亦是表現評估及取得培訓需求必須的基礎。若界定亦包括能力界定，便可同時制定發展需求。當然這些工作描述應作定期更新。

就職

機構應為新加入及投入新工作的人預備一個有效的迎新安排。此舉的目的是協助他們適應新工作角色、工作環境及文化。此外亦有需要讓他們發揮已有的技能及知識，並同時讓他們知道作為機構新成員所需知道的事宜。

應為新人提供與初步工作有關的有效培訓。對於轉職同事的新責任及新角色所需的任何培訓及發展亦應給予適當的新職安排。差劣的就職安排經常引致差劣的表現及偏高的員工流失率。

編製員工個人發展計劃

在編寫個人發展計劃時，經理們須考慮：

- 工作描述及每一工作目標，並細想任何未能達至的表現標準
- 其他與機構目標或個人需要有關的發展需要
- 在未來，有沒有任何與長遠事項有關的發展需要，如潛在工作改變？把它們建立在一個循環發展計劃內以確保日後順利過渡

- 正式培訓以外的選擇，如花時間在人、項目工作、輔導及自我發展上

在討論、同意發展計劃後，應記錄在評估表格上，註明負責行動的人選及日期。此計劃亦每年檢討一次並在年度評估時正式檢討。

困難及解決方法

培訓需求看似一個“混合的袋”

若培訓及發展是有回應的，它應是有用及無用的行動的結合。它應被計劃為業務計劃過程的一部份。在建立業務計劃時應確認需求並把它作為計劃的一部份。將培訓及發展與來自業務計劃的整體主題相連是十分重要的。

對培訓及發展作為基礎的原因缺乏瞭解

若對培訓及發展缺乏瞭解證明是一種困難，這樣便應以此作為機構培訓及發展的一部份，即在機構的層面處理。

計劃

什麼構成良好的計劃？

通常計劃若在一年中的某一時段把所有的需求集合在一起才進行便是最有效的。計劃過程本身需要一個正式的系統如下列所示的。

- options other than formal training, e.g. spending time with people, project work, coaching and self-development.

The development plan should be discussed, agreed, and may be written on the appraisal form, noting who is responsible for actioning, with dates. The plan should be kept under review during the year and formally reviewed at the time of the appraisal.

Difficulties and Solutions

Training requirements seem to be a "mixed bag"

If training and development is reactive it is likely to be a mix of useful and wasteful initiatives. It should be planned as part of the business planning process. Needs should be identified whilst constructing the business plan, and should be an integral part of the plan. It is essential that training and development is linked with overall themes from the business plan.

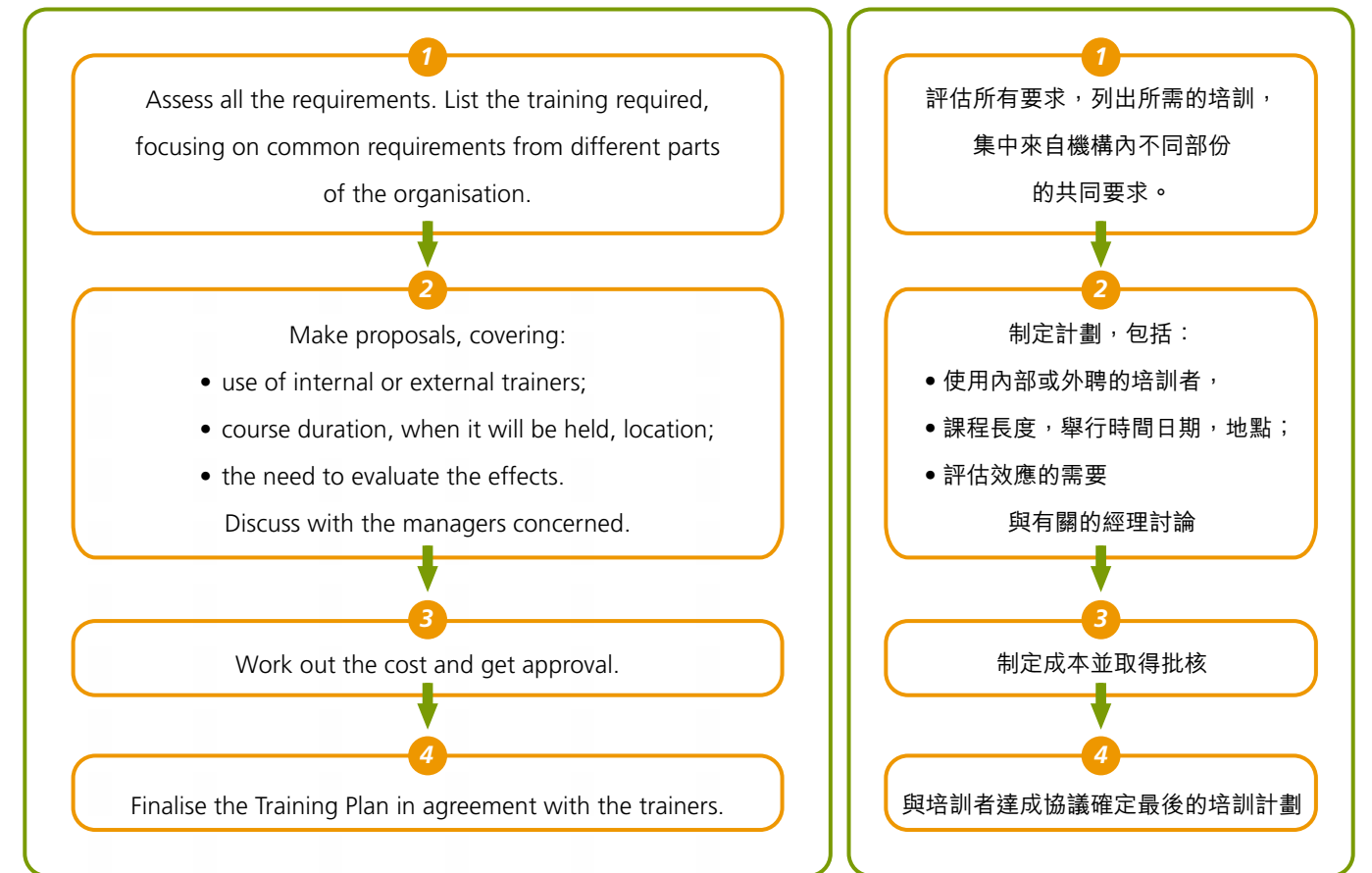
Lack of understanding of why training and development is fundamental

If lack of understanding of training and development is proving a difficulty then this should form part of the training and development plan for the organisation, i.e. at the organisational level.

Planning

What Constitutes Good planning?

Planning is often most effective if it is carried out at a certain point in the year, at which time all the requirements are brought together. The planning process itself needs to follow a formal system such as that shown below.



It is important to plan the overall evaluation in advance of the training being given. This must be done with the trainees' managers. An expectation of results must be conveyed to the trainers and the trainees. It is important to ensure that they know the outcome will be evaluated.

Management Responsibilities

Obtain Resources

A budget or process for approval of such expenditure should be in place if training and development is properly integrated with the business (see Fig.5). It is management's responsibility to make use of this budget in planning to meet training and development requirements. Resources include finance, time, people, physical resources and facilities. These should be costed and managed in such a way that the full value is obtained.

在提供培訓前計劃整體的評估是十分重要的，而評估需與受訓者的經理一同制定。此外對培訓所期望的結果必須傳達給培訓者及受訓者。同時，確保他們知道培訓結果將用作評估亦是很重要的。

管理層責任

獲取資源

若培訓及發展與業務正式結合(見圖五)，這樣便需設立預算及制定獲取開支的批核過程。管理層的責任是在計劃中利用這些預算達至培訓及發展的要求。資源包括財務、時間、實質的資源及設施。這些資源應以得到十足價值的方法來計算成本及管理。

困難及解決方法

經理們給予的較低排序

經理們可能被吸引先處理即時事項因而忽略發展其員工。解決方法是把清晰的培訓及發展責任放在經理的目標內，而他們在這方面的工作亦會於他們的評估中作檢討。

公司的培訓及發展計劃經常落在事件之後。若培訓不是根據整體計劃，便會為符合個別經理而以臨時形式安排。這便是缺乏正式計劃系統的徵兆。

傳達

如何傳達為最佳？

在培訓或發展中，應為所採用的傳達方法作出清醒的決定。

所需的培訓或發展結果 Training or Development Result Required	傳達方法 Delivery Method
知識轉移 Knowledge Transfer	講課 Lecture 練習 Exercises 討論(備有問題及答案) Discussion (with questions and answers)
改善解決問題的能力 Improve Problem Solving Ability	個案研究 Case studies 腦力激盪法 Brainstorming 小組討論 Group discussion
技能發展 Skill Development	手控技能：練習及遊戲 Manual skill: exercises and games 非手控技能：角色扮演 Non-manual skill: role playing
看法的改變 Attitude Change	辯論 Debates 角色扮演 Role playing 小組討論 Group discussion

使用以科技為本的培訓漸多，其優點包括：

- 通常是方便使用者(逐漸方便年輕人)
- 在某些情況下，與傳統的培訓相比有較大的成本效益
- 培訓的進度是根據個人的需要
- 教材的範圍不斷擴大

Difficulties and Solutions

Low priority given by managers

Managers may be tempted to manage the immediate and neglect to develop their staff. A solution is to place clear responsibility for training and development in manager's own objectives. This aspect of their work will then be reviewed in their own appraisal.

The company Training and Development Plan always runs behind events. If training events are not subject to overall planning, they will be arranged in an ad-hoc manner to suit individual managers. This is a symptom of the lack of a formal planning system.

Delivery

How Best to Deliver?

In either Training or Development, conscious decisions should be made on which methods of delivery to use.

Technology-based training is increasingly used. Its advantages include:

- It is often user-friendly (increasingly so for younger people);
- It can be cost-effective in some situations compared with traditional training;
- The training is paced to the individual's needs;
- The range of material is expanding;

- Technology is changing all the time; it is exciting and catches the imagination;
- It is useful for employees who are geographically scattered.

However, it can have disadvantages:

- needs careful selection;
- lack of tutor contact;
- specialised equipment can be expensive;
- equipment may need frequent upgrading;
- programmes can be bought and not used (if not well publicised and administered).

Evaluation and feedback must not be neglected during delivery.

When training takes the form of a definite event, it becomes a two-stage process.

learn → use

It is important at the end of the learning stage that the trainer assesses what has been learnt and understood.

Development is a longer process than training. It is a parallel process.

develop →
use →

This means that regular feedback to the trainees is necessary. Interim rewards should also be considered.

Management Responsibilities

Coaching

Coaching uses the work situation to help a person to better understand work issues and improve capabilities. It is undertaken usually by an employee's line manager or work colleague, and is concerned with improving performance within a short time-scale. Coaching is effective if it is:

- work-based;
- involves completing tasks;
- planned;
- based on a relationship of partnership;

- 科技無時無刻地在轉變，及追上要求
- 對於僱員分散在不同地區便很有用

可是它有下列的缺點：

- 需要小心選擇
- 缺乏與導師的聯繫
- 專門的設備可以很昂貴
- 設備需要頻密地提昇
- 程式可在購買後沒有被使用(若缺乏廣泛的推廣及管理)

在傳達期間不可忽視評估及回饋。當培訓以確實事件形式進行，它便成為2-階段過程。

學習 → 使用

最重要的是培訓者在學習的最後階段評估所學到的及明白的。

發展是一個比培訓更長的過程。它是一個平衡的過程。

發展 →
使用 →

這表示定期給予培訓者回饋是必須的。中期獎勵亦應同時考慮。

管理層責任

輔導

輔導是利用工作情況協助人們更清楚瞭解工作事項及改善能力。這個過程一般是由僱員所屬的生產線經理或同事執行，並通常是與於短時間內改善表現有關。輔導是有效的若它是：

- 以工作為本
- 涉及完成工作
- 有計劃的
- 基於夥伴關係

- 在一個具支持的環境內發生
- 利用個人的強項推廣發展
- 對技術性回饋是有回應的

有經驗及可信賴的建議

獲取有經驗及可信賴的建議是從學習者的導師及顧問中吸取一項特別工作所需的技能、知識及看法的過程。顧問一般是更具經驗的人仕，他們願意把知識與他人分享及建立關係。顧問不應是學習者的直屬上司。顧問的角色是：

- 作為獨立的接觸點提供開放、誠實及保密的討論
- 作為取得有見地意見的來源
- 提供適當的建議及指引
- 幫助及協助詢問者的工作及整體發展
- 提供定期討論及檢討
- 為工作計劃提供協助

控制成本

在安排課程期間，最重要是根據計劃的開支定期檢討真正的成本。主要的直接成本是：

- 培訓者的費用、設施、教材、設備、茶點、交通費、行政費；
- 研究及設計(如用於制定課程的時間)

對於機構的間接成本是：

- 學習成本(受訓者在工作學習過程中未達標準的表現)
- 僱員離開生產工作的成本
- 受訓者缺席引致的混亂

困難及解決方法

沒有發生的行動

這是需要進行調查以決定成因：可能是缺乏某些經理的支持，或是資源的問題？瞭解成因後便需採取行動以解決有關的問題。

- takes place in a supportive environment;
- uses the strengths of the individual to promote development;
- is reactive to skilled feedback.

Mentoring

Mentoring is a process for acquiring the skills, knowledge and attitudes required of a particular job through the use of a mentor who acts as guide, teacher, adviser and confidante to the learner. The development usually takes place over a long time-scale. The mentor is a more experienced person willing to share their knowledge and to develop the relationship. The mentor should not be the mentee's line manager.

The role of the mentor is to:

- be an independent point of contact with open, honest and confidential discussion
- be a source of informed opinion
- give appropriate advice and guidance
- facilitate help and assistance with the mentee's job and overall development
- provide regular discussion and review
- provide assistance with career planning

Control the Costs

During the delivery programme, it is important to regularly review actual costs against planned expenditure. The main direct costs are:

- trainer fees, facilities, materials, equipment, refreshment, travel, administration;
- research and design. (e.g. time spent customising a course).

Indirect costs to the organisation are:

- learning costs (under-performance whilst learning a job);
- cost of taking employees out of productive work;
- disruption whilst trainee absent from work.

Difficulties and Solutions

Actions not happening

An investigation should be made to determine the causes: it may be lack of support from certain managers, or problems with resources. With knowledge of the causes, action can be taken to resolve the problem.

Lack of resources

Training and development should not be the first activity to be cut due to budgetary restrictions when times are bad. Cost/benefit analysis should give credit to the benefits of development initiatives. If money and time are scarce, then consider innovative low-cost, but high-result, options. On-the-job training, coaching, discussion and mentoring are types of approach that will produce real learning. Expensive off-the-job training can be inappropriate.

Poor middle management or teamleader support

Training and development will be ineffective without the support of middle management and supervisors. Training, guidance and coaching are the approaches used to resolve these problems.

Practice

The Essentials of Following-Up on Training and Development

Specify who is responsible for ensuring that relevant practice is carried out after training, and follow-up with them.

Hold a post-training de-brief with the employee to discuss the value and benefits of the training, and its intended use in the job. Follow this by observation of the job or subsequent review of points agreed at the de-brief.

Derive any measures for the effectiveness of the training which were agreed in advance.

Do not neglect to cover the effect of the training during later appraisal.

Management Responsibilities

The employee should be put to work on the applicable task without delay.

The manager should be aware of the possible need for further support, from himself or the employee's colleagues.

Top management should preferably have a company policy on practice after training.

缺乏資源

培訓及發展不應在困難時期因財政預算的限制而首先被取消；成本效益分析應表揚發展行動的益處；若金錢及時間不足便考慮低成本高效益的項目。在職培訓、輔導、討論、顧問都是產生真正學習的方法種類，昂貴的非在職培訓在這時期可能並不適合。

差劣的中層管理或差劣的小組領導支持

缺乏中級管理層及主管的支持，培訓及發展將會失效。培訓、指導及輔導是解決此類問題的方法。

應用

跟進培訓及發展的所需的要素

具體說明負責確保培訓後有關做法得以實行及跟進的人選。

與僱員一同舉行培訓後諮詢會以討論培訓的價值和得益，及其在工作中的計劃用途。接著對工作進行觀察或隨後檢討在諮詢會同意的要點。

獲取任何在之前已協議用於量度培訓的有效性的方法。

在稍後的評估，切勿忽略評估培訓的影響。

管理責任

僱員應毫不遲疑地把所學到的應用在工作中。

經理應留意可能需要他或僱員的同事進一步的協助。

最高管理層最好於培訓後制定實行已學習到的公司政策。

困難及解決方法

“那群人和我們”的對立態度

這可證明機構本身不願意改變。這困難可以是很難解決及會是機構中很多其他問題的中心問題。一間機構通常會有些持負面態度的人。若他們的態度不只有是基於“人的本性”，那需制定一個計劃以界定有問題的事及人，採取適當的行動。

評估

如何量度對組織的影響

最重要是量度及結果。成本包括金錢及時間，量度成本的例子是：

- 培訓活動的總成本
- 培訓日的成本：每天進行培訓及執行活動的總成本的計算可以是把總培訓成本以職員出席的培訓天數均分：

e.g. HK\$600,000 + 其他成本 other costs of HK\$100,000 = HK\$700,000
以培訓天數均分 divided by number of days training = 600
HK\$700,000 以 600均分 HK\$700,000 divided by 600 = HK\$1166 一天 per day

- 培訓成本以薪金的百分比計算
- 平均提供給每位僱員的培訓天數。這是僱員的得益，卻是代表失去生產時間的成本。

例子 Example

一間擁有70人的公司每年的薪金總額是HK\$10,000,000。公司以每位年薪HK\$300,000聘請2位培訓員，另付HK\$100,000其他培訓費用。每月均有8個一天的培訓課程，每個課程供8位受培訓者參予。

總培訓成本(HK\$300,000 X 2位培訓者 + HK\$100,000) = HK\$700,000

每日培訓成本HK\$700,000/(一天8個課程 X 8個受訓者 X 12個月) = HK\$700,000/768 = HK\$911

培訓成本為薪金的百分比計算(HK\$700,000 X 100) / HK\$10,000,000 = 7%

每位僱員的平均培訓天數 = (768/70) = 11.0

A company of 70 people has an annual payroll of HK\$10,000,000. It has 2 trainers at HK\$300,000 p.a. each and HK\$100,000 of other training costs. 8 one-day courses are given each month, with 8 trainees on each.

Total training cost (HK\$300,000 x 2 trainers + HK\$100,000) = HK\$700,000

Training Day cost HK\$700,000/(8 courses 1 day x 8 trainees x 12 months), = HK\$700,000/768, =HK\$911

Training cost as % of payroll (HK\$700,000 x 100)/HK\$10,000,000 = 7%

Average training days per employee (768/70) =11.0

Difficulties and Solutions

"Them and Us" attitudes

This can manifest itself as an unwillingness to change. This can be difficult to resolve, and will be central to many other problems in the organisation. There will often be people in an organisation who have a negative attitude. If this is more than just "human nature", a programme needs to be set up to define the issues and the people, so that appropriate action may be taken.

Evaluation

How to Measure the Impact on the Organisation

It is important to measure both cost and results. Costs involve money and time. Examples of cost measurement are:

- Total cost of the training activity
- Training day cost: the total costs of running training and carrying out activities can be calculated by dividing total training costs by the number of training man-days attended by staff.

In order to show the effect of training it is often best to concentrate on job outputs in addition to financial results.

為突顯培訓的效應，一般最佳的方法是集中在工作的輸出及財政結果上。

例子 Example

一間成功的軟件公司結果是為顧客安裝系統的數量持續增加。公司為顧客提供求助熱線，卻因顧客的數量日增而引起回應人手不足的危機。因此公司把投資放在培訓安裝人員，讓他們提供有效的顧客培訓。有關量度的趨勢如下：

The success of a software company has resulted in an increasing number of systems installed at customers' premises. The company provides a customer help-line, and there was a danger that the response would become inadequate as the number of customers grew. Investment was made in training the installation staff to provide more effective customer training. Trends in relevant measures were as follows:

取自支援櫃檯的打出/打入的電話登記 Derived from Logging the Telephone Calls to/from the Support Desk.

時期 Period	操作中系統的 預計平均值 Est. mean no. of active systems	來電數量 No. of incoming calls	每一系統 的來電 Incoming calls per system	總通話時間 (打入及打出) (小時) Total call duration (in & out) (hours)	每一系統的 通話時間 (分鐘) Duration per system (mins)	每一來電的 平均通話時間 (分鐘) Mean duration per incoming call (mins)
第一季 First quarter	550	1787	3.25	198	21.6	6.67
第二季 Second quarter	605	1021	1.96	121	12.0	7.11
第三季 Third quarter	690	1503	2.18	201	17.4	8.03
第四季 Fourth quarter	790	1492	1.89	189	14.4	7.62

每一安裝系統所需的支援數量下降，使公司能減少提供的支援(每一系統)。而用於每一支援要求的通話時間沒有下降，但稍後以培訓支援人員作為解決，因他們處理顧客來電更有效率。

The amount of support requested per installed system fell, enabling the company to reduce the support effort provided (per system). The time spent on each request did not fall, but was subsequently tackled by training the support staff to handle incoming customer calls more effectively.

A vital aspect of evaluation is to look behind the statistics, at the reasons for specific successes and failures. This concerns the training function, training providers, trainees and management support.

評估的最重要一面是查看數據背後的特別成功及失敗的原因。這與培訓功能、培訓提供者、受訓者及管理層的支持有關。

管理層責任

評估你的員工

評估制度的目的一般是根據目標檢討表現，制定將來的目標及協議培訓及發展計劃

目標應是：

- 與機構的目標及員工的責任相關
- 可由某人在某期限達到，但具挑戰性
- 經職員及經理同意
- 最好是可量度的；
- 清晰地及具體地記錄在評估表上
- 維持在評估之間進行檢討及在年度評估時正式地檢討

一個用作評估的典型程序是：

開始 -

- 解釋評估制度
- 協議來年的目標
- 使用評估表記錄目標
- 使用評估表格記錄已計劃的培訓及發展

評估前 -

- 於職員完成評估的兩星期前發出自我評估表格
- 檢討自我評估表格

年度(或更頻密)評估 -

- 檢查工作描述是最新版本，並在有需要時修改
- 根據目標檢討表現及記錄在評估表格上
- 協議明年的目標並記錄在評估表格上
- 記錄已計劃的培訓及發展在評估表格上
- 附加其他評語及簽署
- 員工審閱完成的表格，加上任何評語及簽署
- 由經理保存表格，副本則交給員工

Management Responsibilities

Appraise your staff

The *aims* of an appraisal system are normally to review performance against objectives, to set future objectives and to agree a training and development plan.

Objectives should be:

- related to the aims of the organisation and to the responsibility of the member of staff;
- achievable by the person in the period, but challenging;
- agreed between the member of staff and manager;
- preferably measurable;
- clearly and concisely recorded in writing on the appraisal form;
- kept under review between appraisals and formally reviewed during the appraisal.

A typical **procedure** for appraisal is:

At start -

- Explain the appraisal system
- Agree objectives for the year ahead
- Record objectives using appraisal form
- Record planned training and development using appraisal form

Prior to Appraisal -

- Issue self-appraisal form two weeks prior to appraisal for completion by member of staff
- Review self-appraisal form

At annual (or more frequent) Appraisal -

- Check job description is up-to-date and amend if necessary
- Review performance against objectives, and record on appraisal form
- Agree objectives for next year and record on appraisal form
- Record planned training and development on appraisal form
- Add any other comments and sign
- Member of staff reads completed form, adds any comments and signs
- Form retained by manager, copy given to member of staff.

Difficulties and Solutions

Poor middle management or teamleader support

If managers and teamleaders do not care about training and development they will not evaluate it. This could indicate management styles which are contrary to good principles in people management. This may be the culture in the company, following bad example set by more senior management. Alternatively, it might be that specific managers are not competent or are using an unacceptable style generally. These issues should be discussed and actions agreed to resolve them.

Poor approach to evaluation

It should be recognised that organisations take time to develop processes for the evaluation of training and development. Advice should be taken on the design of evaluation methods. They can be introduced on a pilot basis to ensure that they are working effectively and that everyone is confident in them.

困難及解決方法

差劣的中層管理及差劣的小組領導支持

若經理及小組領導並不關心培訓及發展，他們將不會進行評估，這表示管理形式與人事管理的良好原則相反。造成這情況可能由於公司文化、跟從更高管理層作出的壞榜樣；又可能是某些經理沒有能力或正在使用一般不可接受的形式。這類事件應加以討論及制定解決的行動。

差劣的評估方法

必須認同機構花在構想用於培訓及發展的評估過程。同時亦須採納設計評估方法的建議。它們可以試驗推行形式介紹以確保能有效地運作並使每人對它們有信心。

Case Studies

案例研究

紡織業範例

背景

公司位於英國中部，專為高街的零售商製造針織衣服及便裝，再以零售商及自己的品牌出售。公司共聘2,000人，其分佈包括9間以英國為基地的工廠，一間在摩洛哥的工廠。公司在英國股票市場具有聲望，且能結合傳統製造業的強項及從事產品開發。公司正在進行全面優質管理，除了NVQs外仍沒有採納其他對外標準。公司有很強的工會組織。

對培訓及發展的興趣

人事管理、培訓及發展方面自古以來已是很差。公司欲透過一個機構發展計劃達至更佳的管理及文化改變。

問題

- 公司已處於文化改變的過程中，全面優質文化已推介到部份工廠。很多工廠的生產線均持不健康的“那群人和我們”的看法。
- 基於商業原因，業務計劃過程須作改善。但計劃本身及其制定方法卻是保密——很多僱員對於業務計劃只有很少或完全沒有溝通。
- 公司整體上沒有培訓及發展計劃。
- 評估過程的名聲大為下降。
- 評估只是空談。

Textiles Company

Background

The company is situated in the UK midlands and manufactures knitwear and leisure-wear for high street retailers under the retailer brands and its own brand names. A total of 2,000 people are employed in nine UK-based factories and one factory in Morocco. The company is a respected name on the UK Stock Market and combines traditional manufacturing strengths with product innovation. It is pursuing Total Quality Management but has not adopted external standards other than NVQs. The company is strongly unionised.

Interest in training and development

People management, training and development had been historically poor. The company wanted to achieve better management and culture change through an organisation development programme.

Problems

- The company was in the process of culture change. TQM had been introduced in some factories and not others. In most factories attitudes on the shop-floor were based on an unhealthy 'them and us' attitude.
- The business planning process needed to be improved for commercial reasons. There was secrecy about the plans and the way they were formulated — most employees had little or no communication about the business plans.
- There was no Training and Development plan for the company as a whole.
- The appraisal process had fallen into disrepute.
- Evaluation was given lip-service only.

Planned Actions:

- Develop a team briefing system to ensure consistent communication, and to increase communication on business plans.
- Ensure all employees have personal development plans and a succession plan is in place. Use the PDPs for review of training and development against targets.
- Set up a Training Panel to steer training initiatives. Improve publicity of training and development.
- Develop the existing open learning facility and market it properly. Define the job of the Training Instructors and include non-production training in their roles.
- Decide the approach to national qualifications in clothing manufacturing.
- Ensure participation in training is linked to plans.
- Introduce briefing and de-briefing documents.
- Standardise and improve evaluation processes including measurement of costs.

Action Taken

Drew Up a Training and Development Plan

A new company training and development plan was devised. The company pulled together existing training and development audits, exercises on identifying needs and skills matrices. In addition it agreed a revised business plan with a summary of goals and targets discussed with all employees. Senior management agreed an overall training and development plan linked to the business plan and using major information from personal development plans.

計劃的行動

- 發展小組會議制度以確保有穩定的溝通，及增加業務計劃上的溝通
- 確保所有僱員有個人發展計劃及設有一持續計劃，使用個人發展計劃根據既定目標檢討培訓及發展
- 成立培訓小組操控培訓行動。界定培訓指導員的工作並包括非生產性的培訓在他們的角色內
- 發展已有的公開學習設施及正確地推廣它們
- 決定達至成衣製造業國際標準的方法
- 確保參予的培訓與計劃連繫
- 介紹詳細指示及諮詢文件
- 標準化及改善包括成本計劃的評估過程

採取的行動

草擬公司培訓及發展計劃

新的培訓及發展計劃已被制定，公司把現有的培訓及發展審核、確認需求及技能矩陣的練習結合一起。此外，公司同意修改業務計劃以附有與所有僱員討論後的指標及目標撮要。高級管理層同意把整體培訓及發展計劃與業務計劃連繫，並使用從個人發展計劃得出的主要資料。



新的培訓及發展計劃以下列標題編寫：

- 業務指標/目標
- 培訓及發展需求
- 培訓及發展目標
- 培訓及發展方法
- 負責組織的人選
- 建議日期
- 成本

計劃以草擬的形式印製，並在再傳閱協定的最後計劃前於每一工廠進行討論。現在每一工廠均定期檢討計劃及於每季會議中為將來的計劃提供建議。

修改評估過程

一個新的評估過程已經展開並顯示正有效地運作。評估包括：

- 工作持有者與經理一同制定目標
- 為每一個人制定機構內以能力為本的工作描述
- 制定個人發展計劃，根據(a)協議個人能力與所需能力之間的差距(b)工作要求的能力進度

以前直接把薪酬與評估相連的做法被新的表現-薪酬掛勾制度取代。

新評估制度的好處是：

- 更有效的工作計劃
- 經理與個人有更好的溝通
- 個人清楚所確認的培訓及發展
- 在評估培訓及發展時，討論及檢討亦同時進行

所有的評估者及受評估者均接受新過程的培訓。同時亦會進行正式的過程檢討，包括分析所有涉及人仕的問卷結果。

The new training and development plan was written under the following headings:

- business goal/target
- training and development need
- training and development objective
- training and development method
- who responsible for organising
- proposed dates
- cost

The plan was published in draft form and discussed at each factory prior to agreeing a final plan which was then re-circulated. Each factory now regularly reviews the plan and makes suggestions for future plans at a quarterly meeting.

Revised the Appraisal Process

A new appraisal process was launched and shown to be working effectively. This consisted of:

- setting objectives jointly between job-holder and manager
- competency-based descriptions of jobs in the organisation tailored to each individual
- setting a personal development plan based on (a) agreement of gaps between ability and necessary competence, (b) progress to the levels of competence needed in the job.

The previous direct link between pay and appraisal was replaced by a new performance-related pay scheme.

The benefits of the new appraisal system were:

- more effective planning of work
- better dialogue between managers and individuals
- individuals clear about what training and development is identified
- discussion and evaluation in appraisal of training and development has taken place.

Training was given to all appraisers and appraisees on the new process. A formal review of the process was carried out, including analysis of the results of questionnaires to all involved.

Benefits

The new team briefing system proved effective in the rapid dissemination of valid information on organisational changes.

Personal development plans gave a greater responsibility for and interest in training, and a realistic focus during appraisals.

Use of national qualifications resulted in training being to recognised standards, resulting in increased productivity.

Training became part of the business planning process, and review of the costs and benefits of training took place in a systematic way. Major initiatives could be analysed; and training in some factories was extended as a result.

好處

新的小組介紹系統證明在快速散佈機構改變的認可資料是十分有效的。

個人發展計劃給予更大的培訓責任及興趣，並在評估期間提供一個確切的焦點。

使用國家資格使培訓亦成為認可的標準，更促使生產力的提升。

培訓成為業務計劃過程的一部份，且能以更有系統的方法檢討培訓的成本效益。主要的行動可被分析及在部份工廠的培訓最終得以擴展。

Case Studies

Case Studies

案例研究



貨倉範例

背景

公司是一間全球分銷公司的英國分銷中心。在利物浦工場有400名員工。母公司是統籌其全球資源的提昇及關注在利物浦的運作。利物浦的運作基本上是很好但有需要進行現代化。因此公司計劃在新的倉房注入資金以代替舊有的貨倉，並且提昇電腦系統至最先進的資訊科技。

對培訓及發展的興趣

配合投資，母公司希望確認在利物浦的管理層及工人的培訓及發展需求以確保所有經理把發展放置在議程的中心位置。

問題

- 儘管工場董事有很強的技术技能，但在人際技巧上則較弱。在過去的幾年，他沒有投資在職員的培訓及發展。
- 除了對特別的情況作出臨時的回應外，並沒有確認和計劃培訓及發展過程。

Warehousing Company

Background

The company is the UK distribution centre for a global distribution company. There are 400 people at its Liverpool site. The parent company was co-ordinating an upgrade of its resources world-wide and had concerns about the Liverpool operation which had operated reasonably well but was in need of modernisation. The company planned to inject capital into new premises to replace the ageing warehouse, and to upgrade the computer system to state-of-the-art IT.

Interest in training and development

To accompany its investment, the parent company wished to identify the training and development needs of the management and workforce of the Liverpool site and to ensure that all managers placed development at the heart of their agenda.

Problems

- Whilst strong on technical skills the senior Site Director was less strong on interpersonal skills and had not invested in the training and development of his staff over the years.

- There was no process for identifying and planning training and development other than through ad-hoc responses to specific situations.
- The roles of individuals at the site had not been looked at for a number of years and there was scope for increased flexibility, less job demarcation and better use of working hours.
- The site had not used the competency approach generally taken up well by other parts of the company.

Action Taken

Wrote Responsibility for Staff Development into Managers' Jobs

The responsibility for training and development was put in managers' own objectives, to increase their accountability.

Conducted a Site Training and Development Needs Analysis

Account was taken in devising the training and development needs analysis of the way the company was changing, including customer needs for an enhanced service, changes to the warehouse and computer systems and multi-skilling opportunities.

The company reviewed analysis techniques available, and decided to base analysis on its existing competency framework, tailored to the Liverpool site. Data on the competencies associated with effective performance was obtained by interviewing effective job-holders. For each job, a purpose was established with key roles, elements of competence and performance criteria per element. Managers were then involved in identifying their personal training and development needs against the levels of performance agreed as required in their jobs. Having established their own needs, the managers were charged with cascading the approach to their staff.

Devised a Development Plan for the Site Director

A training and development plan for the Site Director was drawn up. It was essential that the Director saw this as positive and it was therefore connected with additional responsibilities associated with the enhanced status of the site. Although having faith in his technical skills in overseeing

- 在過去的數年，並沒有檢討個人在工場的角色。因此在工作範圍上增加靈活性，少卻了工作上的界線及能更充份地利用工作時間。
- 工場一般沒有使用以能力為本的方法，故公司的其他部份亦能履行有關的工作。

採取的行動

編寫員工發展的責任列為經理的工作

培訓及發展的責任成為經理的目標以增加他們在這方面的責任。

進行工場培訓及發展需求分析

在制定培訓及發展需求分析時考慮到公司正在改變的方向，包括顧客需要提升的服務，更改倉庫、電腦系統及多方面技能的機會。

公司檢討已有的分析技巧及決定根據現有的能力架構進行分析以迎合利物浦工場。此外，亦從面見有效率的工作持有者可得到有關有效率工作表現的能力數據。每一個職位均會有為其建立的目的，主要角色，能力要素及每一要素的表現標準。接著經理便根據他們職位所協議的表現程度確認個人培訓及發展需求。在建立他們自己的需求後，經理便把方法下傳至他們的員工。

為工場董事制定發展計劃

為工場董事草擬一個培訓及發展計劃。最重要是董事正面地看待計劃，因此計劃是與工場提昇後的附加責任相連。雖然他對其技術技能管理提昇後的工場具有信心，但他不致力於工作所需的“軟化”技能，則公司對他的將來便存有很少信心。這情況在與其直屬上司，遠東董事進行評估期間已作討

論。結果是董事被安排與歐洲工場董事共事，因歐洲工場董事在人事管理方面很卓越，但在技術方面則仍需學習，故透過他們定期會面及溝通可建立融洽和諧的關係及互相學習。公司的人力資源董事則擔任顧問(已簽訂協議)。此外工場董事個人須負責確保培訓需求分析，公司培訓及發展計劃的成功，亦須負責確保在培訓後有一個持續的計劃向他匯報。

this enhancements, the company had less faith in his future if he did not address the "softer" skills necessary in the job. This was discussed during an appraisal session with his immediate manager, the Far East Director. The outcome was to pair him with an equivalent European Site Director, who had shown excellence in people management but had much to learn in technical matters. The two met and communicated regularly to build a rapport and learn from each other. The Human Resources Director of the company acted as mentor (with agreement). In addition the Site Director was held personally responsible for the

Input sessions, including on the competency framework, were mixed with group work. The two main group work sessions involved:

- describing the principles of good training and development, listing barriers to achieving these within the local company, and agreeing ways of overcoming these barriers;
- paired discussions with managers on their approaches to identifying training needs, followed by a plenary session pulling together the best approaches.

本地公司達至這些原則所遇到障礙，並協議克服這些障礙的方法

- 經理以兩人一組討論他們確認培訓需求的方法，接著在全體會議把最佳的方法放在一起。

最後，經理須簡短地記下已同意的行動並向整個小組發表。

Case Studies

舉行培訓及發展日

培訓日是由母公司的人力資源董事設計及負責。根據培訓及發展的原則，這部份是提供給所有經理。培訓目的是：

- 能發揮新的能力架構的最佳優點
- 明白有效培訓及發展的原則
- 協議如何為每一部門的培訓及發展需求作出計劃及行動
- 列出已有的培訓及發展方法大綱
- 列出如何評估培訓及發展的大綱

輸入部份包括能力架構，是結合著團體工作。兩個主要的團體工作部份包括：

- 描述良好培訓及發展的原則，列出在

success of the training needs analysis, the company training and development plan, and for ensuring a succession plan following the training of people reporting to him.

Held a Training and Development Day

A training day was designed and delivered by the Human Resources Director of the parent company. The session was given to all managers, on the principles of training and development. The objectives of the day were to:

- be able to use the new competency framework to its best advantage;
- know the principles of effective training and development;
- agree how to plan and action the training and development needs in each department;
- outline the range of training and development methods available;
- outline how training and development is evaluated.

Finally managers were required to write a short note of actions agreed and present this to the whole group.

Benefits

Fewer mistakes were made in recruitment and promotion, due to the use of the competence-based approach.

Shift patterns and work rotas were changed following multi-skilling, resulting in lower manning cost.

Multi-skilled operatives showed increased interest in their jobs, including responsiveness to customer demands. Labour turnover fell. Interest in Training and Development changed the culture. Greater receptiveness to change was noted favourably by customers.

好處

由於使用了能力為本的方法，在招聘及推廣中很少錯誤。

以多種技能代替值班模式及工作輪值表帶來更低的人力資源成本。

多種技能的操作顯示員工對其工作增加興趣，包括對顧客需求更能快速回應。工人的流失率下降。

對培訓及發展的興趣改變了文化。顧客更歡迎員工對改變有更大的接受能力。

The Future

將來

雖然推測將來的情景是十分困難，但部份趨勢已於現在確切地建立了。

培訓要求日漸複雜

對技能的需求會持續增加以配合快速的科技改變。

員工會明顯地接受更多的教育及更多元化。

外在的標準逐漸成為規範

使用能力及以NVQ為本的方法現正逐漸增多。在發展方面亦從服務時間、一紙證書改變為從真實的工作環中證明其工作能力。這是需要啟發經理使他們有能力評估工作能力及使用正確的架構。

新的授課方法迅速地增加

正統的培訓課程被自我發展取替。

新科技的使用逐漸增加，如電腦光碟、多媒體及學習中心。機構均為僱員建立學習中心讓他們利用科技就著自己的進度學習。此外，很多培訓課程以公開和遙距形式進行，並利用科技協助討論，互聯網及內聯網 - 企業網絡以傳送資料至桌面的電腦內應用的使用廣泛地增加，公司更利用電腦光碟課程，互動錄影帶，CD-I，其他互動及虛擬真實的方法提升培訓，並透過視像會議方便溝通。因此，科技的使用提高了公司知識的儲存

Although prediction of future scenarios is notoriously difficult, certain trends are now firmly established.

Training requirements are becoming more sophisticated

Skill requirements will continue to increase in response to rapid technological change.

The workforce will be significantly more educated and diverse

External standards are becoming the norm

There is increasing use of competence and NVQ based approaches. There has been a change in development from time-served, paper qualifications to proving competence in jobs in the real working environment. This requires developing managers to be able to assess competence and the right framework.

New methods of Delivery are proliferating

Formal training courses are being replaced by self-development.

The use of new technology is increasing, for example CD-ROM, multi-media and learning centres. Organisations are setting up learning centres for employees to learn at their own pace using technology. Many training programmes are conducted using open and distance learning and technology is used to help facilitate discussion. Use of the internet is widespread and use of "intranets" - corporate networks to deliver information and applications to the desktop - is growing. Companies are using CD-ROM programmes, interactive video, CD-i and other interactive approaches, and virtual reality to enhance training and video conferencing to facilitate communications. Technology is being used

to increase the store of knowledge in a company. It also provides the opportunity for people to access information about the availability of training, register for courses on-line and maintain easily updated internal records such as skills matrices.

Career Development is being replaced by Professional Development

Management of career progression is a challenge as organisations become leaner.

Continuing Professional Development is becoming a requirement in many professions.

Professional trainers must address the move of training and development from being outside the mainstream of the organisation to being at the heart of organisation strategy. Line managers are taking on development as part of their role.

Coaching and mentoring are replacing formal training. Gone are the days when training was chosen from a set menu of training courses. Coaching uses everyday experience to improve performance. Mentors share their experience, guide and discuss problems. Both approaches are attuned to the way organisations work in teams and pursue real learning.

Development is becoming integrated with an organisation's strategy.

Delaying, mergers and demergers, new markets and products, the drive to re-engineer processes and the shift to knowledge working all affect the role of managers. Such changes need appropriate staff development initiatives to make them work.

量，亦為他人提供獲取有關培訓課程資料，網上登記課程及維持易於更新的內部記錄，如技能矩陣。

工作發展逐漸被專業發展代替

當機構日漸超卓，工作進度管理便是一項挑戰。

持續專業發展逐漸成為很多專業的要求。

專業培訓必須致力把培訓及發展由遠離機構的主流移至機構策略的中心。生產線經理則以發展作為他們角色的一部份。

輔導及顧問代替正統的培訓，而從一個培訓課程清單中選擇所需培訓的日子已經過去。輔導是利用每天的工作經驗改善表現。顧問則分享他們的經驗、指引及討論問題。這兩個方法與機構的團體工作方法及追求真正學習是一致的。

發展逐漸與機構的策略融洽

分層、合併及拆夥、新的市場及產品、再策劃過程的動力及轉移知識至工作上均會影響經理的角色。這些改變需要適當的員工發展行動才可令它們運作。



Checklist for Self-Assessment

自我評估檢查清單

此部份以表達在培訓及發展有良好做法的句子作為檢查清單。

在回答問卷時以✓號表示你對每一句子的同意程度，界定如下：

A. 是 - 完全地

句子是100%真確地描述機構及是在每一功能 / 地方全面地推行。

B. 大部份

句子的大部份是真確地描述機構及已在最主要的功能 / 地方內推行。

C. 部份地

句子的大部份是真確地描述地方(接近半數)的功能 / 地方。

D. 些微的

句子只適用於數個有限的地方。

E. 不是 - 並不是

機構並未開始使用問題中提及的方法或做法。

This section contains a checklist of statements expressing good practice in training and development.

To respond to the questionnaire use (✓) to indicate your level of agreement with each statement, as defined below:

A. Yes – completely

The statement is 100% true for the organization and is fully implemented in every function / area.

B. Mostly

The statement is mostly true for the organization and is being implemented in most major functions / areas.

C. Partially

Most of this statement is true for some (about half) of the functions / areas.

D. Slightly

The statement is only applied in a few limited areas.

E. No – not at all

The organization has not even begun to use the approach or practice stated in the question.

- | | |
|---|---|
| <p>1 Management is committed to the support of training and development to improve the performance of the organisation.
A [] B [] C [] D [] E []</p> <p>2 The organisation has clearly defined aims and objectives.
A [] B [] C [] D [] E []</p> <p>3 Training and development is in line with the organisation's aims and objectives.
A [] B [] C [] D [] E []</p> <p>4 There are effective processes for identifying training and development needs.
A [] B [] C [] D [] E []</p> <p>5 People changing jobs receive training and development in the new job.
A [] B [] C [] D [] E []</p> <p>6 Training plans exist in the organisation.
A [] B [] C [] D [] E []</p> <p>7 People have personal development plans..
A [] B [] C [] D [] E []</p> <p>8 There is effective induction of new staff.
A [] B [] C [] D [] E []</p> <p>9 People are encouraged to improve their own and others' performance.
A [] B [] C [] D [] E []</p> <p>10 Action is actually taken to meet training and development needs.
A [] B [] C [] D [] E []</p> | <p>1 管理層承諾培訓及發展以改善組織的表現
A [] B [] C [] D [] E []</p> <p>2 機構有清晰地界定目的及目標
A [] B [] C [] D [] E []</p> <p>3 培訓及發展是與機構的目的及目標一致
A [] B [] C [] D [] E []</p> <p>4 有用作確認培訓及發展需要的有效過程
A [] B [] C [] D [] E []</p> <p>5 員工在轉職後會在新工作內接受培訓及發展
A [] B [] C [] D [] E []</p> <p>6 機構是有培訓計劃
A [] B [] C [] D [] E []</p> <p>7 員工有個人發展計劃
A [] B [] C [] D [] E []</p> <p>8 有為新員工安排迎新介紹
A [] B [] C [] D [] E []</p> <p>9 鼓勵員工改善自己及他人的表現
A [] B [] C [] D [] E []</p> <p>10 有真正採取行動以達至培訓及發展需求
A [] B [] C [] D [] E []</p> |
|---|---|

11 讓員工出席培訓，而並不是依賴在職培訓
A [] B [] C [] D [] E []

12 在展開培訓前先作討論並建立目標
A [] B [] C [] D [] E []

13 經理支持培訓及發展
A [] B [] C [] D [] E []

14 培訓及發展的結果是知識、技能及看法得以改善
A [] B [] C [] D [] E []

15 培訓及發展已改善機構，小組及個人表現
A [] B [] C [] D [] E []

16 有用作評估培訓及發展影響的有效過程
A [] B [] C [] D [] E []

17 管理層明白培訓及發展的成本效益
A [] B [] C [] D [] E []

18 員工對培訓及發展持有正面的態度
A [] B [] C [] D [] E []

可得積分: A = 4, B = 3; C = 2, D = 1, E = 0

63 – 72 達至最高標準的卓越運作

54 – 62 很好的培訓及發展實習

36 – 53 有部份好的實習但仍有方法達至最好的實習標準

18 – 35 有部份好的實習但仍缺乏最好的實習
少於18 從頭再來

11 People are released for training rather than reliance being placed on "on-the-job" training.
A [] B [] C [] D [] E []

12 There is discussion prior to training taking place, and objectives are established.
A [] B [] C [] D [] E []

13 Managers support training and development.
A [] B [] C [] D [] E []

14 Knowledge, skills and attitude are improving as a result of training and development.
A [] B [] C [] D [] E []

15 Training and development has improved the performance of the organisation, teams and individuals.
A [] B [] C [] D [] E []

16 There are effective processes for evaluating the impact of training and development,
A [] B [] C [] D [] E []

17 Management understand the costs and benefits of training and development.
A [] B [] C [] D [] E []

18 People are positive about training and development
A [] B [] C [] D [] E []

Points awarded for scoring: A = 4, B = 3; C = 2, D = 1, E = 0

63 – 72 Excellent operating practice meeting high standards

54 – 62 Very good training and development practices.

36 – 53 Some good practices but some way to go to meet best practice standards.

18 – 35 Some good practices but falling well short of best practice.

Below 18 Back to the drawing board.

HKSAR Government Industrial Support Fund Project

"Developing Educational Materials to Encourage and Facilitate Hong Kong Manufacturers for Quality Transformation" (AF/3/98)

香港政府工業支援資助計劃 "開發優管教材以推動香港製造業的優質變革"

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