

THE IDENTIFICATION OF DESIRED PERSONALITY
TRAITS OF TRAINERS AS DETERMINED BY
SELECTED MEMBERS OF THE SOCIETY
OF HUMAN RESOURCE
MANAGEMENT

By

W. ROBERT LAYNE

Bachelor of Science
Massachusetts College of Pharmacy
Boston, Massachusetts
1966

Master of Business Administration
New Hampshire College
Manchester, New Hampshire
1984

Submitted to the Faculty of the
Graduate College of the
Oklahoma State University
in partial fulfillment of
the requirements for
the Degree of
DOCTOR OF EDUCATION
May, 1999

Oklahoma State University Library

COPYRIGHT


by

W. Robert Layne

May, 1999

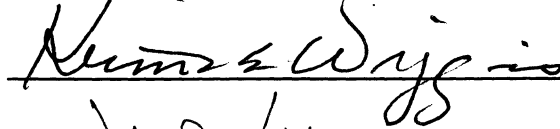
THE IDENTIFICATION OF DESIRED PERSONALITY
TRAITS OF TRAINERS AS DETERMINED BY
SELECTED MEMBERS OF THE SOCIETY
OF HUMAN RESOURCE
MANAGEMENT

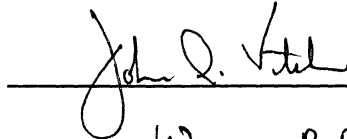
Thesis Approved:

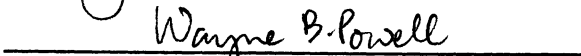


Thesis Adviser









Dean of the Graduate College

ACKNOWLEDGEMENTS

I wish to express my sincere appreciation to Dr. H.C. McClure for his guidance and encouragement throughout the entire Graduate school experience. My sincere appreciation is also extended to Dr. K. Wiggins, Dr. T. Brewster, and Dr. J. Vitek for their advice and guidance. I would like to thank Dr. R. Spinks who advised me on the preparation of my dissertation.

Appreciation is also extended to Jane McClure who provided guidance in the preparation of my dissertation. I would like to thank Dr. James Bost who provided guidance in the analysis and presentation of the data of this study. I would like to thank Mr. Burt Smith who processed the data from the surveys.

TABLE OF CONTENTS

Chapter	Page
I. INTRODUCTION	1
Introduction to the Problem	1
Statement of the Problem	8
Purpose of the Study	9
Objectives of the Study	9
Limitations.....	10
II. REVIEW OF THE LITERATURE	11
Introduction	11
Historical Review of the Study of Competency of Trainers	11
Examination of Related Research	16
Personality Traits as They May Relate to Trainers	21
Trends Within the Training Profession and the Impact on Trainers	26
Changes in the Workplace	26
Changes in the Workforce	27
The New Trainers	29
Changes in Training Delivery Systems	32
Competencies Needed for the Future	33
Summary	35
III. METHODOLOGY	37
Population and Sample	37
Instrument Development for the First Survey	38
Data Collection for the First Survey	39
Data Analysis for the First Survey	39
Instrument Development for the Second Questionnaire	40
Data Collection for the Questionnaires	41
Data Analysis of the Questionnaires	42

IV. FINDINGS	44
Part One of the Study	44
Part Two of the Study	46
Profile of the Respondents	46
Personality Traits	49
Training Personnel	51
Training of Trainers	56
Summary	59
V. SUMMARY, CONCLUSIONS, RECOMMENDATIONS	60
Summary	60
Methodology	63
Findings	64
Conclusions	67
Profile of the Sample	67
Personality Traits	67
Hiring and Selection of Training Personnel	68
Train-the-Trainer Training	69
Recommendations	70
Recommendations for Further Research	71
BIBLIOGRAPHY	72
APPENDIXES	76
APPENDIX A -- LETTER MAILED WITH THE FIRST SURVEY ...	77
APPENDIX B -- SURVEY INSTRUMENT FOR THE FIRST SURVEY	79
APPENDIX C -- MEANS OF IMPORTANCE RATINGS RANKED BY MEAN	83
APPENDIX D -- MEANS OF IMPORTANCE RATINGS RANKED BY SURVEY ITEM NUMBER	87
APPENDIX E -- LETTER MAILED WITH THE SECOND SURVEY	91
APPENDIX F -- QUESTIONNAIRE FOR THE SECOND SURVEY	93
APPENDIX G -- IRB APPROVAL	96

LIST OF TABLES

Tables	Page
I. SELECTED MEANS OF IMPORTANCE RATINGS OF PERSONALITY TRAITS RANKED BY MEAN	45
II. RESPONDENTS BY JOB TITLE	47
III. RESPONDENTS BY NUMBER OF EMPLOYEES	47
IV. RESPONDENTS BY TRAINING BUDGET	48
V. RESPONDENTS BY NUMBER OF TRAINERS	49
VI. PERSONALITY TRAITS IMPORTANCE RANKINGS	50
VII. IMPORTANCE OF PERSONALITY TRAITS SELECTED BY RANK AND RATING	50
VIII. NUMBER OF COMPANIES HIRING OR ANTICIPATING HIRING TRAINERS FROM OUTSIDE OF THE COMPANY	51
IX. HIRING PRACTICES OF COMPANIES FOR 1996 TO 1998, AND 1999 TO 2000	52
X. SOURCES OF TRAINERS HIRED FROM OUTSIDE OF THE COMPANY	53
XI. NUMBER OF COMPANIES DEVELOPING OR ANTICIPATING DEVELOPING TRAINERS FROM WITHIN THE COMPANY	53
XII. DEVELOPMENT OF TRAINERS FROM INTERNAL SOURCES FOR 1996 TO 1998 AND 1999 TO 2000	54
XIII. PRIOR JOBS OF TRAINERS DEVELOPED FROM INSIDE THE COMPANY	55
XIV. IMPORTANCE OF SUBJECT MATTER EXPERTISE	56
XV. COMPANIES PROVIDING TRAIN-THE-TRAINER TRAINING DURING THE FIRST YEAR AS A TRAINER	56

XVI. SUBJECTS OF TRAIN-THE-TRAINER TRAINING PROVIDED BY COMPANIES DURING THE FIRST YEAR	57
XVII. SUBJECTS OF TRAIN-THE-TRAINER TRAINING INTERNALLY AND EXTERNALLY PROVIDED DURING THE FIRST YEAR	58
XVIII. SOURCES OF EXTERNALLY PROVIDED TRAIN-THE-TRAINER TRAINING	59

CHAPTER I

INTRODUCTION

Introduction to the Problem

Training is a big business. The annual industry report in *Training* indicates that \$58.6 billion was budgeted in 1997 for formal training in companies with 100 or more employees. According to the report, 146,605 businesses in the United States have 100 or more employees. Approximately 57 million employees each received an average of 30 hours of formal training in 1996. Ninety-four percent of the companies used live instructors and 81% of all of the courses presented were classroom based using live, rather than electronic media based, instruction. Because live trainers have an important role in the development of millions of employees, how a company selects and trains trainers may also be critical to the success of the company (Industry Report 1997, 1997).

Although the total dollars budgeted for formal training in companies with over 100 employees increased, 59% of the companies reported a 1997 budget equal to or less than the 1996 budget. Furthermore, 54% reported that they expected the 1998 budget to be the same as or less than the 1997 budget (Industry Report, 1997). Bachler (1997) suggested that although some organizations increased spending for training, a general belt tightening occurred along with an increased accountability for training dollars spent. Phillips (1996) emphasized the increasing demands on the departments of human resource development (HRD) to produce a measurable return on investment (ROI). He presented several methods and examples of ROI calculations.

Training demands will continue to increase, driven in large part by the increase in technological change in the business environment (Bassi, 1996). As the use of technology

in the training environment increases, trainers must acquire additional competencies to use computer assisted instruction and distance based learning systems (Furst-Bowe, 1996; Galagan, 1994). In addition, an increase is needed in the skills of trainers because the work force that is to be trained will become more educated and more diverse (Bassi, 1996). McLagan (1989) also indicates that in addition to the more diverse work force, other trends will cause changes in the way the human resource departments will have to respond. She notes that the nature of the work that employees will do will require more judgment, flexibility, and contribution of ideas. The expectations of the work force will also change. They will expect more meaningful work, and will expect to be involved in more of the decision making processes. Training in decision making will become critical. Caudron (1997) discussed the characteristics of generation X'ers, people between the ages of 20 and 33, and the challenges and skills trainers will need to be effective with this population.

Several studies have attempted to determine the competencies needed by trainers. Before a competency can be selected and determined to be necessary for a particular task, the meaning of the word "competency" must be defined and understood. In 1997, McLagan defined some of the many meanings of "competency." She discussed task competencies, result competencies, output competencies, knowledge, skill and attitude competencies, and superior-performer differentiators.

Most commonly, we use task based and superior-performer differentiators to try to define the ideal profile for a particular job. Task based competencies are the activities and procedures of the job. The ideal is to reduce performance of these activities to a routine, thus minimizing the variation in performance and providing a basis for improvement. Data entry and assembly line work might be some examples. Superior-performer differentiators are those competencies that superior performers have and others do not. McLagan (1977) also suggests that these differentiators "have roots in intelligence and personality" (p. 41).

Parry (1996) also discussed soft and hard competencies. Examples of soft competencies are traits such as assertiveness and enthusiasm; hard competencies are job

related skills such as facilitation and coaching. He states that personality traits are soft and are not likely to be changed significantly in adulthood. He synthesized a definition of competency to include “. . . can be improved via training and development” (p. 50). He, therefore, excluded personality traits from competencies. He did suggest, however, as did McLagan (1997) that some personality traits can be reduced to competencies. For example, leadership may not be able to be directly assessed as a competency. We may have to reduce it to components such as listening skills, motivational skills, providing feedback, and assessing performance, which can be measured. Anecdotal evidence would suggest that acquisition and demonstration of these skills could be influenced by personality traits.

In reviewing trainer competencies, it may be of value to differentiate between those competencies which may be more influenced by personality traits and those which may not. If personality traits are a strong component of the competency, then it may be more difficult to train an individual to become competent in that area. An example would be platform skills. Most studies indicate that competency in platform skills is important for a trainer. If a person is naturally introverted and lacks self-confidence, then it will be more difficult for that person to achieve an acceptable level of platform skills when compared to someone who is confident and extroverted. It be more difficult for the first individual to reach an acceptable competency level, and the cost of training that person may be more. The time involved in training that person may be longer.

A study sponsored by the American Society for Training and Development (ASTD), entitled *The Models for HRD Practice*, identified 35 competencies in four categories for HRD professionals (McLagan, 1989). The categories are technical competencies, business competencies, interpersonal competencies, and intellectual competencies. The technical and business competencies are less likely to be influenced by personality traits. Examples and the definitions are:

1. Computer competence; the understanding and/or using of computer applications.

2. Facilities skill; planning and coordinating logistics.
3. Subject matter understanding; knowing the content of a given function or discipline being addressed.
4. Cost-benefit analysis; assessing alternatives in terms of their financial, psychological, and strategic advantages and disadvantages.
5. Project management; planning, organizing, and monitoring work (McLagan, 1989).

The interpersonal and intellectual competencies are more likely to be influenced by personality traits. These competencies and the definitions include:

1. Coaching skill; helping individuals recognize and understand personal needs, values, problems, alternatives and goals.
2. Feedback skill; communicating information, opinions, observations, and conclusions so that they are understood and can be acted upon.
3. Presentation skill; presenting information orally so that the intended purpose is achieved.
4. Questioning skill; gathering information from stimulating insight in individuals and groups using interviews, questionnaires, and other probing methods.
5. Relationship building skill; establishing relationships and networks across a broad range of people and groups.
6. Intellectual versatility; recognizing, exploring, and using a broad range of ideas and practices, thinking logically and creatively without undue influences.
7. Observing skills; recognizing objectively in or across situations.
8. Self-knowledge; knowing one's personal values, needs, interests, styles, and competencies and their effects on others (McLagan, 1989).

Using the information from the Models for HRD study above, Parry (1996) created a matrix that identified the specific competencies for various roles. For the role of instructor/facilitator under interpersonal competencies, he lists: coaching skill, feedback skill, group process skill, presentation skill, questioning skill, and relationship building

skill. The intellectual competencies for the instructor include intellectual versatility, observing skill, and self-knowledge. These are defined above. Several other studies have been reported that identify the most desired competencies for trainers and HRD professionals (Dingus, 1990; Rothwell, 1992; Simmons, 1994).

Desired competencies appear to have been well defined. A need exists, however, for research that identifies the personality traits needed to support the acquisition and demonstration of these competencies. Some journal and magazine articles have anecdotally identified desirable and undesirable traits of trainers. Carmel (1991) suggested that creativity, patience, motivation, persuasiveness, high energy level, and sense of humor are important. Flannagan (1983) defined trainers' personality types that were a negative influence on the learning environment. She assigned names such as "the entertainer," "the egoist," and "the campaigner," and described their behaviors.

Successful training occurs when a positive association occurs between the trainees, the trainer, and the program being taught. Hendon and Barlow (1985) suggested that trainers be scaled on two orientation axes, one for amusement and the other for reality orientation. Once scaled and compared with scales for the trainees and the program, a match or mismatch can be seen.

Certain behaviors of trainers can enhance the learning environment. Rosenbaum and Baker (1979) encouraged trainers to raise the self-esteem of the participants, to focus on behaviors rather than personalities, to listen actively, and to use positive reinforcement.

An argument could be made that people who are attracted to the training profession in the first place are people who to a large extent already have the desirable personality traits. Evidence exists that personality traits influence vocational choice (Anastasi, 1994). Trends show, however, that some people who are in training positions did not choose training as their vocation. The growth of the number of smaller firms means more one-person, full-service human resource departments and more training done by nontraditional training personnel (Bassi, 1996). This combination is leading to new and more creative

ways to enlist in-house trainers. Internal networks of experts will have to be organized to provide these resources.

In his article "Just Passing Through," Filipczak (1996) referred to companies that have revolving door training departments. In these companies people from various departments serve a term of two to three years in the training department as part of their career development. This provides several benefits to the individual, who can now build stronger relationships throughout the organization, and to the training department, which can get real life experiences from the field brought into the training materials. The input of fresh relevant material adds credibility to the training programs and to the training department. The article gives examples of other organizations that have tried and discontinued revolving door departments. They discontinued the practice because of the transition from technical skills to behavior based skills such as decision making, critical thinking, and problem solving. Technical subject matter experts (SME) may not be good at training in these nontechnical areas.

One of the main advantages of selecting an internal person for training is that he/she is already a culture match. In considering the importance of personality traits in the success of a trainer, a person who already knows and has adopted the culture of the organization would be a benefit to the training department (Staubb, 1992).

Selection of the right person in the organization to become a trainer is a challenge. The first inclination is to go to the person who is doing the job well, call them a subject matter expert (SME), and then ask them to develop a training program to transfer their expertise to others. In one variation of this, Cusimano (1996) explains that peer-to-peer training has some inherent problems. First, managers may be SMEs but they still may not have the depth of understanding needed for many highly technical fields. Second, even if they are technically competent, they may not have the facilitation skills, communications skills, and other competencies to be an effective trainer.

Clark (1985) goes even further and suggests that a person with a wealth of experience may have difficulties appreciating the learning needs of people new to the field. They are so comfortable with being able to perform the tasks, they may not be able to relate possible problems, proper sequence, or complete information about a process or procedure. People who are good at their jobs rather than experts may become the best trainers.

Many organizations start the selection process by considering their subject matter experts and selecting those they feel will most likely become the best trainers. Ideally, a list of prerequisites would be used to screen the candidates. Clark (1985) described a method that involved recommendations of supervisors, interviews, simulations, and role plays. Subjective evaluation is used for some of the desired prerequisites such as the ability to relate to supervisors, peers, and students. According to Lee (1984) the reputation, interest, and experience of the candidates have to be taken into consideration. The people should have some interest in education and not just be looking for a way to escape from the field. Staubb (1992) suggests that organizations use a screening process that assesses technical skills and the culture match with the organization. In addition, behavioral traits such as professional demeanor, positive attitude, and sense of humor should also be considered. Perhaps these should also be taken into consideration when assessing internal candidates.

Although it seems that training managers and other HRD professionals who hire trainers would benefit by using personality assessment tools as part of the selection process, no evidence was found to support this. With the increasing use of nontraditional trainers who did not choose training as their vocation, more need exists to consider personality traits in the selection process.

The training that trainers receive provides another opportunity for altering personality traits, or at least the behavioral manifestations of those traits. Once trainers are hired or selected, they may receive train-the-trainer instruction. According to the Industry Report (1997), 71% of the organizations surveyed provided this type of training. Of those, 28% used inside training exclusively, 31% used external providers exclusively, and 41%

used some combination of internal and external train-the-trainer programs. Twenty-nine percent did not provide any train-the-trainer programs at all. DiPaolo (1983) reviewed several external train-the-trainer programs to determine if the content matched the desired competencies. Most of the programs offered training in presentation techniques, learning theory, and instructional strategies. Half offered communications skills and 25% offered training in motivation techniques. The length of the training programs ranged from 3.5 to 5 days. Bassi (1996) determined that train-the-trainer courses and the content would become more critical in the future.

Current literature about the content of internal train-the-trainer courses could not be found. Commercially available train-the-trainer programs put more emphasis on subjects such as course design, presentation, and evaluation than on subjects such as motivation, coaching, and relationship building. Even if they presented a balanced training program with a duration of several days, it is unlikely that any meaningful personality changes could occur. The length of time required to change personality traits, if it is possible to change them at all in an adult, is much longer (Brody, 1994).

One possible solution to improving the abilities of trainers in all of the desired competency areas is to improve the selection process for trainers. Given that 28% of the companies with over 100 employees did not even do any training of trainers, the proper candidate selection may be even more critical to the success of training within these organizations. Selecting candidates with the appropriate personality traits to support the desired competencies would make sense. A properly selected candidate would save the organization time and money in the development process as well as have the potential for increasing the return on investment for training dollars.

Statement of the Problem

Individuals responsible for hiring trainers or selecting individuals from within an organization to become trainers should consider the criteria of personality traits, existing

Individuals responsible for hiring trainers or selecting individuals from within an organization to become trainers should consider the criteria of personality traits, existing competencies, and subject matter expertise. The desired competencies are well defined and subject matter expertise can be determined through various methods. The problem is that for specific personality traits to become meaningful criteria for selection, they first have to be identified and ranked in importance. Those individuals who are most responsible for trainer selection and development in the organization should do this. No evidence was found that identified and ranked desirable personality traits for trainers. This is the focus of this study.

Sub-problem: Several articles refer to the trend of selecting potential trainers from the workforce. This study includes questions relating to the current and future source for trainers in the company.

Sub-problem: Evidence exists that several companies use train-the-trainer programs to enhance the competencies of the trainers. No study could be found which clearly described the content and structure of internal train-the-trainer programs. This study includes questions seeking answers to this need.

Purpose of the Study

This study identifies and prioritizes desirable personality traits of trainers as defined by the people who select or hire trainers. It identifies the source of trainers that a company may use, and defines the structure and content of training provided to these trainers during their first year as trainers.

Objectives of the Study

The objectives of this study are to: (a) identify the personality traits most desired in trainers; (b) prioritize those traits in the order which the respondents believed were most

important to achieving competency as a trainer; (c) identify the sources for trainers within the organization; and (d) identify what additional internal or external train-the-trainer training is provided to people who are selected to be trainers.

Limitations

Surveys were sent only to those individuals responsible for the selection of training personnel. It did not solicit responses from trainees or from trainers.

Companies of all sizes were included in the study, even though it was more likely that companies with more than 100 employees would have an individual whose primary function was training. The ASTD Industry report (1997) indicated that over 57% of the companies with over 100 employees provided some kind of training.

The list of personality traits included in the questionnaire was limited to those traits indicated by a pilot study group as being important for a trainer.

The study was also limited by the source of names for the mailing lists. The respondents were randomly selected from the Society for Human Resource Management (SHRM) membership list. Only those people with titles of vice president, director, or manager, and whose job function was training and development were requested. Their responses may not be representative of training personnel who are not members of the SHRM or of members with other titles or job functions.

Participation in the survey was voluntary. It is possible that those choosing not to participate had opinions that differed from those who participated. The use of a mailed survey instrument may have yielded different responses from those that would be obtained from other survey methods such as direct interviews. The use of a survey instrument in the form of a questionnaire assumes that the respondents understand the questions the way the researcher intended.

CHAPTER II

REVIEW OF THE LITERATURE

Introduction

The review of the literature for this study is presented within the following framework:

1. Historical Review of the Study of the Competencies of Trainers
2. Examination of Related Research
3. Personality Traits of Trainers
4. Trends Within the Training Profession and the Impact on Trainers
5. Summary

Historical Review of the Study of Competencies of Trainers

Throughout history, people have been learning how to perform tasks and to train other people. The transfer of knowledge and skill through the process of apprenticeship has been in practice for several thousand years. This system was satisfactory to provide the industrial classes with experienced tradesmen. Various early religious institutions taught the arts, private schools taught statesmanship, and armies trained soldiers. In each of these cases we can assume that the competency of the trainer had an impact on the skill development of the person being trained (Simmons, 1994).

During the period from the 12th through the 15th centuries the guild system grew and became the forerunner of the labor union in the 20th century. People with similar skills banded together for a common good. The master workers were the trainers, and an apprenticeship system was in place. When the immigrants arrived from Europe, they

brought these systems with them; thus, many of the early American training activities resembled their European counterparts. This system was sufficient when America was primarily an agrarian society.

As an industrial based society developed in the United States and immigrants began to arrive in large numbers, an urgent need arose to quickly train people to work in industry. In the late 1800s, several companies established company schools to train workers for specific tasks. During the next few decades, training in companies became more formalized, but the focus remained on training only newly hired workers. Skilled craftsmen shunned training because they were insulted that someone would think their craftsmanship could be improved (Simmons, 1994).

Some public and charitable organizations also began pre-job training of unemployed individuals and immigrants. World War I created a need for a large number of skilled workers. The sense of urgency brought the focus of training back to the factories. Again, we can assume that the rate at which the worker became competent was in part determined by the ability of the trainer to train others, not just the trainer's ability to demonstrate the skills needed.

During the depression of the 1930s, industrial training programs were significantly reduced. The high unemployment meant that many skilled workers were available to those organizations that needed them. When the United States entered World War II in the early 1940s, the demand for job specific skills again increased. The urgency to develop a constant flow of skilled workers to replace those who were called into the armed forces created a great demand on the training function within the companies.

The American Society of Training Directors, later to become the American Society for Training and Development (ASTD), had its beginnings in 1944. The concept was for individuals with similar responsibilities and functions to share information and resources. Fifty-six people attended the first convention in 1945. The organization continued to grow to its present membership of over 70,000 (On line, www.astd.org).

The 1950s and 1960s brought in the technical age and with it an urgency to create highly technically competent workers. The launch of *Sputnik* by Russia in 1957 really brought this need into focus. The United States was no longer perceived to be the technologically superior nation. The computer age began in the 1970s. As the use of computers increased an ever increasing need developed for highly specialized workers. Several types of workers foresaw that computerized automation would replace many of their jobs and so they sought training in new skills (Simmons, 1994).

Training once again was under pressure to create competent workers with the skills for the present and future needs of the company. Trainers were challenged at least two ways. They had to train untrained workers in new skills and retrain an already skilled workforce in new skills. The competencies of trainers were becoming more critical to the success of this process. Up until the early 1980s, no standards of performance excellence existed for individuals practicing in the training and development field.

One of the areas in which the ASTD has made a significant contribution is through applied research. In 1978, the ASTD undertook a research project titled "A Study of Professional Training and Development Roles and Competencies." This was one of the first efforts to define competencies.

In 1981, the American Society of Training and Development (ASTD) charged one of its committees to "produce a detailed and updateable definition of excellence in the training and development field in a form that will be useful to, and used as a standard of professional performance and development" (McLagan & Bedrick, 1983, p. 10). "Models for Excellence" was a far-reaching research project with over 1,000 people participating. This unique study was comprised of many individual studies that produced input or products for later steps in the study. The first step resulted in a list of 15 training and development roles and the definitions to be used as the units for analysis for the study. The next step identified 34 business and economic environmental influences on the training and development field.

A study team conducted a literature review and drafted a list of 102 outputs. Once the outputs were defined, they identified the skills, knowledge, and attitudes it would take to produce those outputs (McLagan & Bedrick, 1983). An example of an instructor output is to produce "an individual with new knowledge, skill, attitudes or behavior in his or her repertoire" (p. 18).

After several reviews by role experts, 31 competencies for human resource professionals were identified. Examples of the competencies listed were: understanding adult learning, counseling skill, feedback skill, performance observation skill, presentation skill, and relationship versatility. The next step defined the behaviors which should be demonstrated at various levels of competency of a particular role. This resulted in a paragraph narrative of examples of behaviors illustrating three levels of expertise, basic, intermediate, and advanced, for each competency (McLagan & Bedrick, 1983).

This ASTD study represents one of the first attempts to completely and systematically analyze the competencies needed for success in the various roles of the training and development field. The detailed results of this study provided a framework for several future studies. Performance standards of this type provided guidelines for selection, training, and evaluation of people in the training and development field. The lists of competencies were also good guidelines for those educational institutions that were involved in programs to develop human resource professionals.

A third study by the ASTD titled "Models for HRD Practice" was conducted by McLagan in 1986 and reported by her in 1989. It built upon the concepts and recommendations of the 1978 and 1983 studies. She discussed those changes in the organization that will have an impact on the development oriented practices in the work place. She also discussed the changing workforce and the resulting changes in the practice of human resource and development (HRD) within the organization. HRD was designated as that subset of the human resources discipline that uses training and development,

organization development, and career development as the primary processes (McLagan, 1989).

Within this study 11 roles, kinds of work that HRD professionals do, are defined. The role of instructor/facilitator consists of presenting information, directing structured learning experiences, and managing group discussion and group processes. The study contained more than the definition of roles and outputs. Experts defined the standards and quality requirements for each output. One output and its standard for the trainer/facilitator involves creating a safe and protective learning environment where the trainer models the desired behavior, respects individuals, and enhances the self-esteem of the learners. Other outputs such as facilitation and presentation skills are also defined with their requirements. Most of the standards contain a strong component of human relations skills in addition to the technical skills.

Ten outputs were defined for the trainer/facilitator role. Several of these outputs involve facilitation in various training situations such as role plays, group discussions, and media based training. The standards for these outputs require that the facilitator/trainer gives sensitive feedback, creates a psychologically safe learning environment, manages conflicts, respects individuals' rights, and addresses individuals' concerns. To be more effective, a trainer must do more than just present the material (Rothwell & Sredl, 1992, pp. 345-351).

The ASTD has made significant contributions through progressive studies which have sought to further define and refine the ideas of competencies in the human resource field. The last of these studies, the 1989 study, added the quality requirements. An examination of the quality requirements listed above indicates that the personality traits of the trainers will have a great influence on their ability to meet many of these requirements.

Parry (1966) discussed some of the cautions that need to be observed when conducting any competency study. He stated that personality traits should not be included in a list of competencies for a particular job because many traits are "either inborn or

cemented long before adulthood and are not amenable to significant change through training" (p. 50). He does state that although personality does affect performance, personality traits should not be included in the list of competencies. If certain traits are important to the success of the job then they should be included in a separate list.

Examination of Related Research

No studies were found that related desired personality traits to the job of trainer. The following studies contained some additional material about the competencies of trainers. Dingus's (1990) dissertation, *The Competencies of Entry Level Trainers as Expected by Executives of Fortune 500 Companies*, had two main purposes. The first was to identify the competencies of entry level trainers, and the second was to compare the perceived importance of these competencies as expressed by various levels of corporate management. Some limitations, however, exist in this study. No statistical validation exists of the instrument used. Only specific executives of Fortune 500 companies were surveyed. Fortune 500 companies are more likely to have large, well defined human resource or training and development departments. They are more likely to have sufficient resources in terms of manpower, equipment, and facilities so people's roles can be well defined within each of the job functions. The results of this study should probably not be projected to other smaller companies that are more likely to have people performing multiple functions within a training or human resource department. The trends, which will be discussed later, are towards individuals performing multifunctional roles.

The corporate officials selected to receive the instrument were the Vice President of Operations, the Vice President of Finance, the Vice President of Marketing, the Vice President of Human Resources, and the Director of Training. Dingus' study is important because it looks at perceptions of people who are responsible for hiring or selecting trainers in an organization, in this case, the Vice President of Human Resources and the Director of Training. Smaller companies will not necessarily have all of these levels of

corporate management but will usually have someone responsible for hiring trainers and selecting people as trainers.

The Dingus instrument asked the respondents to list their preferences about the academic requirements of entry level trainers and to rate 25 competencies on a 5-point Likert type scale ranging from *low importance* to *extreme importance*. A definition of each competency was provided to help with uniform interpretation of the questions. A survey was sent to each of the five executives in 200 randomly selected companies from the Fortune 500. Of the 1000 surveys sent, 253 were returned.

The results of the Dingus study which may be pertinent to this study are those responses given by the Director of Training and the Vice President of Human Resources. When these individuals were asked about their preference for education requirements for trainers, 80.5% responded that a minimum of a bachelor's degree should be required. They believed that the following primary academic areas should be considered: liberal arts (34.4%), business (18.3%), communications (10.7%), education (13.7%); and 17.6% indicated any area of study would be acceptable. This study asked for the actual backgrounds of the people in training positions, not the preferences of those people who hire or select trainers.

The Directors of Training and the Vice Presidents of Human Resources agreed upon the top five competencies for entry level trainers. They were, in order of importance: group facilitation skills, presentation skills, listening skills, interaction flexibility, and critical thinking. The descriptions provided for these competencies give some insight into what behaviors or personality traits may contribute to the acquisition of these skills.

1. Group Facilitation skills - The ability to develop, maintain, and use group interactions and dynamics to process understanding and positive change.
2. Presentation skills - Ability to present materials in a lecture discussion setting.
3. Listening skill -Ability to listen as needed, to enhance the teaching/learning environment.

4. Interaction flexibility - Ability to relate to values and needs of a broad spectrum of the work force from corporate management to hourly general labor employees.

5. Critical thinking - Ability to view information and situations from multiple positions and identify likely different facets and attitudes (Dingus, 1990).

Luthy (1991) conducted a study to identify and validate the functional skills of trainers in a corporate training environment. This study tried to go beyond competencies and define the functional skills that would allow those competencies to be achieved. The basis of this study was the 1983 ASTD study that identified 31 topical competencies for trainers. Luthy developed from three to five functional skills for each of these competencies and asked the survey respondents to rank these skills in perceived importance on a 6-point Likert type scale ranging from *not important* to *very important*. Luthy believed that in order to define performance standards for the training profession, it was first necessary to define the skills needed to express competence.

He limited his study to companies with sales in excess of \$50 million. He assumed that smaller companies would not normally have formal human resource or training and development staffs. The companies used were selected from a commercially available mailing list. The geographical area considered was limited to Washington, Utah, and Idaho. The targeted group was the Human Resource Manager and the Training and Development Manager within each company. One hundred ninety-three surveys were sent and the response rate was 70%.

The top five functional skills and abilities that were identified were, in order of importance:

1. Works easily and cooperatively with a broad mix of personnel-- executives, managers, supervisors, employees, and so forth, regardless of age, position, ethnicity, or religion.

2. Summarizes general information into concise, logical written material for a variety of training and administrative uses.

3. Is flexible, non-judgmental, and open, while remaining focused on both the individual's and the company's T&D objectives.

4. Assesses individual and group training needs within the organization.

5. Effectively communicates in writing to specific audiences.

Two of the top five skills were related to written communications. Luthy did not offer any interpretation of this, but perhaps it may be indicative of a trend away from class-room based instruction. He did conclude that the skills associated with communications and interpersonal interaction were most important to trainer competence.

Simmons' (1994) dissertation *Industrial Training Competency Requirements as Reported by Training Personnel* evaluated competencies and application from the trainer's point of view, not from the perspective of the person who was hiring the trainer. Trainers were also asked questions about their companies, their individual training, and their background. The scope of the study was limited to a 50% random sample of 116 manufacturing companies with 100 or more employees in Central Kentucky. The narrow scope raises concerns about extending the findings to other companies of different size, location, and function. Participants were individually solicited for their willingness to participate in the survey. Of the 89 individuals agreeing to participate, 69 completed and returned the survey.

The survey instrument consisted of three portions. The first portion asked background information such as age, gender, job preparation, education level and degree, and military experience. The second portion asked company information such as the number of trainers, percentage of training contracted to outside vendors, level of governmental interaction in training, and training budgets. The competency section was a listing of the 35 competencies reported in the 1989 ASTD study. The respondents were asked to rank each in importance on a 5-point Likert type scale ranging from *very low importance* to *very important*. They were also asked to rank each of the competencies in their frequency of use on a 6-point Likert type scale ranging from *never* to *very often*.

Information was collected about the education and degree background of the trainers surveyed. When they were asked the highest degree earned, 23% had only a high school diploma, 17% had an associate's degree, 39% had a bachelor's degree, and 21% had a master's degree. Of the individuals with degrees, 31% had a major in business or management, 11% in liberal arts, 7% in education, 4% in communications, and the balance in other fields. In Dingus' study (1990), 80.5% of the corporate executives of the Fortune 500 companies preferred a minimum of a bachelor's degree. Sixty percent of the trainers in Simmons' (1994) study had a minimum of a bachelor's degree. People applying for positions in Fortune 500 companies will more likely have at least a bachelor's degree.

Another point of interest was the preparation for the job that the trainers received. Each respondent could select any and all types of preparation received. The results were:

<u>Available choices</u>	<u>n</u>	<u>%</u>
Took formal courses	37	53.6
Learned by doing	61	88.4
On-the-job training	54	78.3
Attended workshops	51	73.9
Relevant military experience	9	13.0
Other	12	17.4

(Simmons, 1994, p. 97)

Most of job preparation was informal with about 88% learning by doing, and 78% receiving on-the-job training. About 50% of the people never took formal courses to prepare them for their jobs although about 75% attended workshops. Given the narrow sample, these numbers may not be able to be extended to other companies outside of the region or of a different industry or company size.

The major focus of the Simmons study was to learn which competencies trainers felt were important and to what degree they used the competencies they felt were important.

The table below lists the top three findings of the study:

<u>Competency</u>	<u>rank in importance</u>	<u>rank in frequency of application</u>
Presentation skill	1	2
Feedback skill	2	1
Coaching skill	3	3

(Simmons, 1994, p. 114)

A Spearman Rho Rank Correlation was done on the complete list of 35 competencies, and the results indicated there was a correlation of .98 between the two rankings of importance and frequency of use. The trainers indicated the following competencies were both the most important and the most frequently used:

1. Presentation skill - presenting information orally so that the intended purposes are achieved.
2. Feedback skill - communicating information, opinions, observations, and conclusions so that they are understood and can be acted upon.
3. Coaching skill - helping individuals recognize and understand personal needs, values, problems, alternatives, and goals (Simmons, 1994).

The ASTD study groups all of these under interpersonal competencies. Personality traits greatly influence interpersonal issues.

Personality Traits as They May Relate to Trainers

Anecdotal evidence would suggest that, whereas competence in specific areas may be necessary for a trainer to be effective, all trainers who are equally competent may not produce the same training results. Other factors influence the effectiveness of the trainer-trainee relationship. Flannagan (1983) suggested that the managers of training departments placed an emphasis on the processes and form of training and have, in general,

overlooked the issue of personality. In her article, she focuses on personality types that have a negative influence on the effectiveness of training.

One of the types was "the entertainer." She said, "The entertainer likes the feeling of being constantly on stage. Consequently, their major concern is with their own progress, not that of the trainees. Classrooms full of heads nodding in agreement are seen by these types as rave reviews" (p. 26). This is not a scientific study, and her types seem to have been derived from her personal research and experience. No sources are cited.

Rosenbaum and Baker (1979) stated, "When classroom trainees do not accomplish the learning objectives to the degree that the trainer expected, the trainer's behavior in the actual interpersonal situation of teaching may be at fault" (p. 90). They stated that the trainer is a behavior model for the trainees. When the trainer acts in ways different from what he is trying to teach, discord exists in the minds of the trainees, and consequently they selectively reject these incongruous ideas and principles.

They suggest five behaviors that can increase the trainee's motivation to learn.

1. Maintain and enhance the self-esteem of participants.
2. Focus on participant's behavior and not on personalities or attitude.
3. Actively listen to show understanding.
4. Use reinforcements to shape learning.
5. Set goals and follow-up dates and maintain communications.

The best way to change the behavior of the trainer was to use behavior modeling. More specifically, they suggested that trainers learn from observing videotapes and by rehearsing and being coached by master trainers. Many psychologists believe that, although behaviors can be changed, they are changed in a way that is consistent with basic personality traits (Costa & McCrae, 1994).

Carmel (1991) suggested that the effectiveness and the potential of a trainer are somewhat influenced by certain personality traits. The personality traits that she believed to be important were: creativity, motivation, patience, persuasiveness, high energy level, and

sense of humor. No explanation for selecting these traits, nor proof of their value was given.

In 1977, Cooper conducted a study that involved 32 trainers in 12 management development training programs with 227 participants. Among other things, the study examined the effect of a trainer's personality on the results of experiential type training. Both trainers and trainees completed a personality inventory. The trainees rated themselves and their peers as being either helped or hurt by the experiential training. Multiple regression statistical techniques showed that the conditions under which the trainees were most likely to benefit were: when the trainees were "realistic and self-sufficient" and also "open to their own feelings" in an atmosphere where the trainers were "experimenting and free thinking" and "relaxed/tranquil" (p. 1117).

Cooper (1977) concluded that "trainer personality and behavior during training are very strongly linked to the most positive and least negative change in subsequent work performance, particularly relaxed, self-sufficient, and tranquil trainers" (p. 1121).

O'Brien (1985) and Lee (1991) discussed the use of Jungian type indicators, such as the Myers-Briggs Type Indicator, as a tool for trainers to better understand the trainees in their programs. Neither discussed the use of these instruments for evaluation or selection of the trainers themselves.

A 1990 study by Busche and Gibbs reported on the use of the Myers-Briggs Type Indicator (MBTI) and Ego Development to predict organization development (OD) consulting competence. They undertook the study because traditionally behaviors have been used to predict competence. They noted that various researchers observed that some consultants seemed to get better results than others do although they used the same behaviors. Whereas they did not compare the role of the OD consultant to the role of a trainer, they did state that the role of the consultant is to advise, coach, facilitate, and integrate planned changes in an organization. Two of these competencies, facilitation and coaching, are also important for trainers.

Busche and Gibbs (1990) caution that to focus on skills and techniques as an indication of effectiveness is "to ignore decades of anecdotal evidence about the role of personality in determining success" (p. 338). The MBTI assesses an individual's preferences along four scales: extraversion-introversion preference, the sensing-intuition preference, the thinking-feeling preference, and the judging-perceiving preference. They postulated several hypotheses concerning these preferences and OD consulting competence. The stage of ego development was measured using the Washington University Sentence Completion Test (SCT). Their sample consisted of 64 trainees in a 20-day professional consulting skills program. They were given the MBTI during their first day of training and the SCT during the first three days. Competence was measured through peer surveys and trainer evaluations.

They concluded that the separate scales of the MBTI were of little use in predicting OD consulting competence. They did find a positive correlation between the preference for intuition and effective consulting behaviors. Intuition was described as "seeing beyond the concrete present to future possibilities, having a sense of the whole in a complex, multivariate process" (p. 354). They found that the stage of ego development was a much better predictor of OD consulting competence.

Personality traits can influence the effectiveness of a trainer. Trainers come to their jobs with a set of personality traits that are relatively stable. Costa and McCrae (1994) reviewed evidence that suggested in most cases personalities are considered fully developed between the ages of 25 and 30 and are considered unchangeable. Part of the problem with determining whether personalities can change is related to how one defines personality. For example, if it is defined as having some genetic component, then barring genetic engineering, it cannot be changed in adulthood. If it is defined using some component of life's experiences, then by definition it is continuously changing. The authors chose to define personality in terms of a six element model that consisted of "psychophysical systems that represent the basic tendencies of the individual, characteristic adaptations such

as habits, attitudes, relationships, and dynamic organization, processes that integrate the flow of experience and behavior" (p. 23).

The issue of most concern to this study is that the characteristic adaptations, which include skills, habits, attitudes, beliefs, social roles, and relationships, are realizations of the basic tendencies which are inherited or acquired in childhood and may or may not be changeable in adulthood. The interaction of these basic tendencies with external influences produces the characteristic adaptations that are more visible.

Costa and McCrea's (1994) methodology involved a historical study of the literature related to personality stability. Only recently two significant advances in personality research brought answers to some long-standing questions. The first was the development of the five-factor model in 1990 that allowed all of the hundreds of traits that were described in the literature to be organized into five categories. These are neuroticism (N), extraversion (E), openness (O), agreeableness (A), and conscientiousness (C). The second advance was that the data from several longitudinal studies of personality that were begun decades earlier was now being analyzed.

Costa and McCrea analyzed the results of several longitudinal studies spanning from 5 to 30 years and sorted the results into the five basic categories outlined above. They extrapolated results over a 50-year adult span and concluded that "about three fifths of the variance in true scores for personality traits is stable over the full adult life span" (p. 33). An argument could be made that two fifths are not stable and, therefore, may be able to be changed. What can and what cannot change may be more of an issue. Costa and McCrea suggested that external influences play a part in the stability of personality traits. They stated that "behaviors, attitudes, skills, interests, roles, and relationships change over time, but in ways that are consistent with the individual's underlying personality" (p. 35).

Trends Within the Training Profession and the Impact on Trainers

Bachelor (1997) wrote an article based on interviews with training professionals that represents a current view of trends in the profession from the field. Bassi, Benson, and Cheney (1996) wrote a more thorough and more formal study that is based on data and research. Several of the trends identified in both articles are the same.

The subject matter of this section has been divided into the following sections: changes in workplace, changes in the workforce, the new trainers, changes in training delivery systems, and competencies needed for the future.

Changes in the Workplace

Downsizing is one of the major trends that is impacting the training field. Although only 17% of all of the companies that participated in the 1997 survey by *Training* magazine reported that they were currently downsizing, at least 27% of the larger companies, those with over 1,000 employees, were downsizing (Industry Report, 1997). Those larger companies are more likely to have training departments. Downsizing for whatever reason causes many changes in the training functions of an organization. Reducing the workforce in a company means that those people who remain have to do more and need more skills. This puts more demands on a training department that most likely has been reduced along with other departments (Bachelor, 1997). When downsizing occurs, older and more experienced workers suffer more job losses (Bassi, Benson, & Cheney, 1996). Loss of experienced workers puts additional strain on the training department that now has to bring other employees up to the required standards of performance.

According to Bassi, Benson and Cheney (1996), 58% of large United States corporations have downsized their HR departments, and the number of training staff of the 50 members of the ASTD Benchmarking Forum has decreased by 50% or more. As training departments are decreased, the training function is being assigned to line

supervisors and department managers. The remaining trainers now have to train others to train. As training departments are downsized and demands for training increase, the trend towards outsourcing is increasing.

The same Industry Report (1997) indicated that about one third of the companies outsourced training design and delivery. As training moves to external providers, the managers of training will need additional skills such as contract negotiation and cost analysis. Another creative approach to outsourcing was mentioned by Bachler (1997). He described a company that hired contract trainers to present company authored material.

Several of the authors (Bassi, Benson, & Cheney, 1996; Bachler, 1997; Industry Report, 1997) believed that outsourcing will increase in the future. If that occurs, training departments and trainers will have to assume new roles that will require new competencies. Trainers will have to purchase training, coordinate internal training with that provided by outside vendors, and supervise and evaluate outside trainers. Trainers will have to increase the knowledge of their subject matter and their knowledge of the various providers to make the most intelligent decisions about what training to buy for their organizations, and from whom to buy it. The result, according to Bassi, Benson, and Cheney (1996), is that train-the-trainer courses will become more common and more critical.

Changes in the Workforce

"The American workforce will be significantly more educated and more diverse," said Bassi, Benson, and Cheney (1996, p. 30). The changing composition of the workforce will challenge trainers to relate to employees who bring different cultural aspects to their jobs. Trainers must learn to utilize different points of view for the benefit of the organization and to be more skillful at designing programs for, and communicating training to, the more diverse workforce. Interpersonal skills and group dynamic skills will become more important.

The percentage of employees from 45 to 64 years old will also increase, creating an increasing challenge to trainers to teach new skills to people who have more established patterns of behavior. Behavior patterns are established through repetition over a period of time, so trainers will have to be more skillful at creating and delivering training that will achieve the desired results while sustaining the confidence, self-esteem, and respect that experience has traditionally demanded in our culture (Bassi, Benson, & Cheney, 1996).

Caudron (1997) writes that about 40 million workers between the ages of 20 and 33 are causing companies to rethink their training programs. These Generation X'ers have characteristics that have resulted in different learning styles. Many generation X'ers are more independent because they grew up in households that had two working parents. The X'ers are more technologically oriented and computer literate. They were raised with powerful media influences and expect instant gratification. Trainers must understand their characteristics and what characteristics set them apart from older workers. Training that works best is experiential, contains many practice periods, is somewhat self paced, and has multiple simultaneous inputs of information (Caudron, 1997). Some of these techniques are in conflict with the way older workers may learn.

Another trend that is driving the change in nature of the workforce is the increasing use of technology in the manufacturing environment and the service environment. The total quality movement was in part the driving force for some of these advances. Consequently, the worker of today and tomorrow is more educated. More than half of the jobs created through the year 2005 will require education beyond high school. This represents an increase from the 31% of new jobs that required such education between 1983 and now (Bassi, Benton, & Cheney, 1996). The changing technology creates the need for additional skills that must be supplied by the trainer. The trainer will also be challenged to present programs that motivate and hold the interest of a more educated audience.

The use of contract or temporary workers is projected to grow at about 4% annually. The temporary staffing industry accounted for almost 10% of the growth of

overall employment in the United States (Bassi, Benson, & Cheney, 1996). This increasing use of non-company employees creates many challenges for a training department that will have to create programs that can be delivered to people who may not be familiar with the culture of the organization. Temporary workers may not be familiar with the jargon of an industry or of a given company. Permanent employees sometimes treat temporary workers as outsiders and believe that they may not have the same level of commitment or loyalty as the other permanent company workers. Trainers have to consider all of this, which in turn places more demands on the trainer and the training department. In many cases, training of temporary workers becomes the charge of the manager or line supervisor.

The New Trainers

The term "new trainers" refers to current trainers who have been operating in the traditional training role and will have to acquire new skills to assume new or additional roles. "New trainer" also refers to those individuals who have not been part of the training department, but because of trends or their expertise, have been called upon to assume a training role.

One of the trends in companies is to move towards a learning organization (Senge, 1990). In a learning organization, training is integrated with the actual performance of the work rather than being treated as a separate event. Training is in real-time. Training is part of the job function of supervisors and managers, not just the job function of the traditional trainers (Bassi, Benson & Cheney, 1996). Leaders in a learning organization need to create a climate where personal growth and learning are desired (Senge, 1990).

The focus of learning is moving away from the traditional classroom setting and is moving onto the work floor. Learning is more self-directed and team based (Galagan, 1994). Benson (1997) estimates that "employees spend on average 70% of their total training time in informal activities" (p. 93). Hequet (1995) found that companies are

looking for trainers from line workers and line managers. The role of the traditional company trainer is changing from one of delivering training to the worker to one of training the manager on how to train the worker. He also found that the traditional trainer's focus is shifting to performance issues in the field. The trainer will have to have additional sets of skills such as customer service skills, problem solving skills, performance evaluation skills, and needs assessment skills.

Cusimano (1996) suggested that managers would have to be trained to be facilitators to present their ideas to others, especially if the manager is going to be called upon to do classroom training. Responsibility for training managers to be facilitators may fall upon the traditional trainer. Dumas and Wile (1992) point out that, whereas many employers use subject matter experts (SME) as trainers in an informal environment, these SMEs do not have any formal training experience or training to be trainers. Just because someone knows how to do a job well does not necessarily mean he or she is a good instructor. The authors point out a very important consideration: "In an educational setting (such as a college class), the curriculum is driven by what the teacher knows. In a training situation, course content is driven by what the trainees need to do or produce, that's valuable to the company" (p.108).

In some companies, the trainers in the training department are not professional trainers. Some organizations use the training department as an assignment along the career path for selected employees. These companies view the assignment in the training department as a growth step to learn how to present information and learn the human resource or training department function. Companies may find some value in bringing in field experts to add relevancy to training. The result is that training is being done by temporary trainers (Filipczak, 1996). Broadwell (1982) believed many people were located in the training departments because they were good at doing what they were supposed to train others to do. These subject matter experts did not know how to do needs analysis, write objectives, design training materials, or present information in a learning environment.

He suggested that anyone new in the training position be trained to become competent in these skills.

In the Academy Instructor Review, the oversight committee found a lack of a recruitment system and a lack of formal skills screening for potential instructors in the FAA Academy. In their 1989 report, they recommended that a formal means be devised to assess the technical, oral, writing, analytical, and human relations skills of potential instructors (Academy Instructor Review, Final Report of the Oversight Committee, Federal Administration Academy, 1989).

Nine years later the FAA Academy still has not created a formal system for recruitment and screening. When a need arises or is anticipated, bids are sent out to the various FAA facilities. Interested parties submit an application. They are only considered if they have subject matter expertise. Of the 140 trainers who are presently employed by the Airway Facilities Division, only 10 did not have specific subject matter expertise. Those 10 had related technical skills and were trained immediately after hire, on the specific piece of equipment that they would be training others to use.

The candidates are screened for writing skills by looking at the bid they submitted. They are screened for general appearance and oral communications skills through an interview process. Seeking letters of recommendation from the candidate's present and past supervisors is the basis for assessing their interpersonal skills. Once the instructor is selected they receive training in various training skills such as curriculum development, assessment techniques, and platform skills. During their first year senior instructors observe and review the new trainers. While the managers of the Academy agree there is more to training than just subject matter expertise, they do not use formal instruments to determine the level of skills and attitudes present before hiring the candidates (J. L. McMullen, Manager, Airway Facilities Division, FAA, Oklahoma City, personal communication, August 14, 1998).

Clark and Kyker (1985) believed that in many cases skilled technicians can become good classroom trainers "provided they have the prerequisite abilities to benefit from the train-the-trainer help you can provide" (p. 55). Their article presented a procedure used to select people from the technical ranks to become trainers. People were selected based on their technical competence, written communication skills, individual and group verbal communication skills, ability to relate to others, and ability to work with minimal supervision. Apparently, the authors drew from their own experience in designating these prerequisites since no sources were given. Although over 12 years have passed since this article was written, there is still a need to develop a list of prerequisites that may enhance the selection process.

Changes in Training Delivery Systems

The technical revolution brought about many changes in the way that training is delivered. This trend will continue. Mastering the technology used to design and deliver training will have to be a skill set of the future trainer. Twenty-nine percent of the formal training that takes place in a company involves training pertaining to computers and computer systems (Industry Report, 1997). The percentage of computer training that is delivered by technology, nonhuman interaction, rose from 17% to 24% in just this year. Thirty-five percent of the companies that responded to the survey used teleconferencing or distance learning. These companies estimated that 9% of their training was done using teleconferencing. The use of electronic performance support systems by these companies grew from 5% in 1996 to 12% in 1997.

Bassi, Benson and Cheney (1996) discussed some of the forces which will drive the increasing use of technology in the future. Smaller training departments, the challenge of providing training for a more diversified workforce, the need to bring the training to the work floor, and the need for real-time instruction were among the trends mentioned. Other factors could be the ease of providing training over a corporate intranet, the ability to

produce relatively high quality materials in a portable (CD-ROM) package for easy distribution, and the need for self-paced instruction by the generation X'ers.

A recent study by Furst-Bowe (1996) sought specifically to define the technical competencies needed by trainers to use computer based technologies and distance learning systems. Her sample was selected members of the International Society for Performance and Instruction, a professional training organization focused on performance technology. The most frequent level of needed competence cited was the ability to use and to assist trainees to use various types of technology. Even trainers of computer skills will need the people skills and communications skills to transfer the information to others.

Competencies Needed for the Future

As researchers study the competencies of trainers, disagreement exists about how to define and how to measure competency. Competency models are used to select, evaluate, and determine the training needs of an individual (McLagan, 1997). Depending on the definition, the term *competencies* can include skills, attitudes, values, and subject matter knowledge. One of the uses of models is for the selection process, and in that case many organizations are interested in what characteristics set the superior performers apart from average performers. "These competencies usually focus on people's abilities with roots in intelligence and personality" (p. 41).

Furst-Bowe (1996), Bassi, Benson and Cheney (1996), and Bachler (1997) have made a case for a trainer to develop technical competencies in computer based learning systems. Technical competency can be in the use, evaluation, design, or delivery of training programs. Trainers can learn these skills in either the formal education process before coming to the job, in train-the-trainer programs while on the job, or in the continuous learning process through the tenure on the job.

Changes in the deliverers of training will require trainers to teach others how to train. Trainers will "give away their training skills" (Hequet, 1995, p. 29) to managers and

expert line workers. Trainers' roles will shift from being the direct skill builders of the workforce to becoming performance evaluators. Trainers will look at people as they perform their jobs and develop ways to improve specific performance and, therefore, will need to become more analytical. Training professionals will have to learn more about organizational development and organizational psychology (Bassi, Benson, & Cheney, 1996).

Galagan (1994) believes that trainers will have to become more knowledgeable about learning models in the context of job performance. Trainers will have a role in managing the changes in an organization and keeping that organization responsive. Trainers will have to acquire basic business knowledge to learn how to achieve business related results. She also emphasizes the future skill sets of trainers will include performance analysis, performance intervention design, and performance evaluation.

Outsourcing of training will require the trainer to change from a deliverer of training to a purchaser of training. Trainers will have to know about the different programs that are available and something about the companies that provide those programs. Trainers will have to be able to do cost benefit analysis and negotiate purchases. The training done by external providers will have to be coordinated with internal training directives. The trainer will have to make sure that the provider understands the mission and culture of the organization.

In 1982, Broadwell suggested that because many trainers found their way into the profession by being experts at some skill, new trainers should receive education in basic skills. Those skills are knowledge of training philosophy, conducting needs analyses, designing courses, training as an instructor, operating a classroom, and understanding teacher-to-learner relations. This article emphasized that basics have to be learned in the training profession, as in any job.

Summary

As training has evolved through the events of the industrial revolution and the technical revolution, so have the demands on the individuals doing the training. The ASTD has made significant contributions to the study of competencies needed for all aspects of the human resource and training professions beginning in 1978. The most recent study, which was reported in 1986, included quality requirements for the desired outputs for the various roles in the HRD field. Examination of the quality requirements for the role of trainer/facilitator revealed that several of these qualities could potentially be influenced by the personality traits of the trainer.

Several research studies have been conducted to better define competencies needed from the points of view of those hiring trainers and of the trainers themselves. No studies could be found which specifically addressed the desired personality traits of trainers in the business environment. Several cited authors of nonscientific articles have defined desirable personality traits of trainers, but no basis was given for choosing the traits mentioned.

Several notable changes in the training and development field have been brought about by trends in the workplace. Downsizing has reduced the manpower of the training departments, forcing them to find internal and external sources of trainers. Outsourcing training may result in using trainers who may not be culturally attuned to the training goals of the organization. Moving internal managers and line workers into training roles creates challenges for the existing training departments.

The trend is for trainers to interact more on a one-to-one basis rather than with groups in a classroom environment. The need for real-time training is increasing. Trainers will be interacting with employees to analyze job performance and develop performance improvement programs. Trainers will interact with a more diverse, better educated workforce. The range of age groups of the workforce from the experienced older worker to the generation X'ers will require more interpersonal skills and flexibility on the part of the trainer. While a need for trainers to have platform and presentation skills will always

exist, more training will be delivered through computer based delivery systems. Trainers will have different interactions with workers that will require the trainers to have different competencies.

The trainer of the future will need negotiations skills, coaching skills, facilitation skills, group process skills, interaction flexibility, and performance analysis skills. The ability to demonstrate competency in these skills may be influenced by the basic personality traits of the trainer. Personality traits are relatively stable in adulthood, and under normal circumstances behavioral manifestations of these traits can be changed only within limits.

This literature review leads to these conclusions: first, traditional training roles are being assumed more and more by nontraditional trainers. These individuals most likely are coming right from the workforce with little or no prior training education or training experience. No way exists to be sure that they have the interpersonal skills and the personality traits that will enhance their ability to be effective trainers.

Second, the traditional trainers in the organization are assuming new roles that will require them to acquire new or more in-depth skills in specific competency areas. Many of these skills are interpersonal in nature, and acquiring competency in these skill areas may be influenced by personality traits. No method exists for determining whether or not these trainers have the desirable personality traits.

CHAPTER III

METHODOLOGY

The purpose of this study was to identify the most desirable personality traits of trainers as determined by selected members of the Society of Human Resource Management. Individuals responsible for hiring external trainers, and selecting internal personnel to become trainers, were asked to rate selected personality traits on the degree of importance. In addition, data were collected and analyzed to determine the sources of trainers for an organization. Questions were asked to determine what additional internal or external training and education trainers received within their first year as trainers.

Population and Sample

The population examined in this study consisted of individuals responsible for hiring external trainers and for selecting people within the organization to become trainers. The population was selected from the membership of the Society of Human Resource Management (SHRM). SHRM is an organization whose membership is predominantly from management personnel in the Human Resource field. The companies and organizations represented come from a broad variety of industries, with work forces from under 100 to over 5000. The dollar volume and the training budgets also cover a broad range.

The requested mailing list was of those people employed by companies with more than 100 employees and who had specific job titles and training as a job function. Companies of at least 100 employees are more likely to have individuals whose major function could be described as training (Simmons, 1994). The people whose titles were

either Manager of Training and Development, Director of Training and Development, or Vice President of Training and Development were the population chosen. People with these titles would more likely be responsible for the hiring or selecting of trainers. 1,302 members met the criteria listed. A mailing list of these members was purchased from SHRM. Two samples of 450 were randomly selected from the total population. One sample was used for the first survey and the second sample was used for the second questionnaire.

This study consisted of two parts. The first part was to determine, through a survey of one sample of the population, which personality traits should be included in the second questionnaire. The second questionnaire was sent to a different sample of the population. This questionnaire asked the sample to rank these selected personality traits in order of importance, to provide information about the sources of trainers and the training they provided to these trainers., and other general information about their organization. Using different samples of the population for each part of the study validated the choice of traits and eliminated historical bias.

Instrument Development for the First Survey

A list of 100 traits was compiled from the studies of Cattell (1943) who listed 171 personality variables, Edwards (1970) who listed 90 trait terms, and Strack (1997) who listed 153 traits in a personality adjective check list. The lists were combined. Duplicates and negative traits that would obviously not be desirable for trainers were not considered. Examples of undesirable traits are hostile, short-tempered, and disorderly. One hundred traits were randomly selected from the remaining traits and placed in a random order to create the survey list.

Two reliability checks were added to the survey. The first check was to include two traits that are synonyms, *reliable* and *dependable*, in different places in the list. The second check was to include the same trait, *logical*, two times in different places in the list.

To test the validity of this instrument, a preliminary mailing of the instrument was sent to 40 randomly selected members of one sample of 450 from the population. The respondents were asked to rank the importance of each trait for a trainer on a 6-point Likert type scale ranging from *not important* to *very important*. They were asked to comment on the structure and clarity of the instrument. Twelve surveys were returned with very few comments regarding the structure and clarity of the instrument. The respondents answered the questions according to the directions.

Data Collection for the First Survey

The remaining 410 members of the population sample were mailed a survey packet that consisted of a letter of introduction (Appendix A), the list of 100 traits (Appendix B), and a self-addressed stamped envelope for return. They were asked to rank the importance of each trait for a trainer on a 6-point Likert type scale ranging from *not important* to *very important*.

All respondents were assured that their information would remain confidential and would be presented in a way that it could not be related to the source. Each survey packet was numbered and cross referenced against a list of the members of the population in case the source of the response needed to be identified.

Data Analysis of the First Survey

Of the 450 surveys sent, 11 were not deliverable to the addressee. One hundred twenty-eight, 29.1%, of the remaining surveys were returned and analyzed using the Statistical Package for Social Sciences (SPSS) computer program for analysis and tabulation. The mean responses and the standard deviation for each trait were calculated. The results were listed in descending order of mean (Appendix C) and in order of survey item number (Appendix D). The process used to select the traits for inclusion in the second survey was to conduct a t-test comparing the first mean with each succeeding mean

to determine the first point at which a significant difference of the means occurred. That point was between trait 9 and 10.

Because the synonymous traits, *dependable* and *reliable*, were ranked by the respondents within the top nine, *reliable* was eliminated. This left a list of eight traits to be included in the second questionnaire. As a reliability check two additional traits were included. The trait *nurturing* was taken from position 33 in the ranking by mean, and the second, *cautious*, from position 67 in the ranking by mean. This list of ten traits became part one of the second questionnaire.

Instrument Development for the Second Questionnaire

The design of the second questionnaire used many of the suggestions of Cox (1996) with respect to structure, wording of the questions, and scale. The instrument consisted of four parts. The first was the list of the ten personality traits from the first part of the study. The second section contained questions about the training staff. The third part asked for information about train-the-trainer training that the company provided. The fourth part solicited general information about the company and the responder. The following is a description of each of the sections of the instrument.

1. Personality traits – The recipients of the questionnaire were asked to rank ten personality traits in order of importance for a trainer. The most important trait was ranked 1, and the least important, 10.

2. Training personnel – The sample was asked to provide the number of trainers they hired or selected in each of the last three years as well as the projected number of trainers to be hired over the next two years.

Data were collected regarding the sources of trainers hired from outside the company and trainers developed from within the company. Several sources derived from the literature and the experiences of the researcher were included. Space was provided to write in sources not included in the list.

The participants were also asked to rate the importance of subject matter expertise (SME) as a criterion for initial selection of a trainer. A 4-point Likert type scale ranging from *not important* to *very important* was used.

3. Train-the-trainer training information – The third section gathered information about the number of hours and the subject matter of any internal or external training provided to trainers in their first year as a trainer. Several subjects derived from the literature and the experiences of the researcher were included. Space was provided to write in subjects not included in the list.

4. General information - This section was used to obtain information about the respondent and his or her company. These questions could be completed by checking the appropriate category or by a brief written answer. Questions about the individuals asked their job title and if they were responsible for hiring or developing trainers. The company information sought was the number of employees, the number of full-time trainers, and the 1998 budget for training.

To test the validity of this questionnaire, a preliminary mailing was sent to 40 randomly selected members of a different sample of 450 from the population. The participants were asked to complete the survey and to comment on the structure and clarity of the instrument. Eleven surveys were returned with a few comments regarding the structure and clarity of the instrument. A slight change was made in the wording of the directions for the first part of the questionnaire based on these comments. One respondent commented on the lack of definitions for the personality traits, and another commented on the amount of information asked. In all eleven surveys all of the responses, except for one portion of one survey, were filled in as intended.

Data Collection for the Questionnaires

The remaining 410 members of the population sample were mailed a survey packet that consisted of a letter of introduction (Appendix E), the questionnaire (Appendix F), and

a self-addressed stamped envelope for return. All respondents were assured that their information would remain confidential and would be presented in a way that it could not be related to the source. Each survey packet was numbered and cross referenced against a list of the members of the population in case the source of the response needed to be identified by the researcher.

Data Analysis of the Questionnaires

The data from the questionnaires were analyzed using statistical techniques that described the frequency, mean, and standard deviation. T-tests were used to compare the means of some responses. The Statistical Package for Social Sciences (SPSS) computer program was used for analysis and tabulation. The mean and standard deviation of each of the ten personality traits in section one were calculated and listed in a table according to rank.

Questions 1 and 2 in section 2 asked for the number of internal and external trainers hired or selected in given years. The responses were grouped into three brackets: 0, 1 to 5, and over 5. The percent of the total responses for each bracket was calculated.

The responses to questions 3 and 4 of section 2, the sources of trainers, were tabulated and the frequency of each response was calculated. All results were presented in tables. The responses to the question asking about the importance of SME were tabulated and the frequencies of each response were calculated. The results were presented in a table.

The responses to the questions in section three, Training of Trainers, were tabulated and frequencies calculated. The results were presented in tables. The results of questions 1 through 4 of the general information section were tabulated and the frequencies of each response calculated.

The responses to question 5, the number of trainers in the organization, were grouped into five brackets: 0, 1 to 5, 6 to 10, 11 to 15, 16 to 20, and over 20. The percent of the total responses for each bracket was calculated. All results were presented in tables.

Other tables were constructed to present the data in ways that facilitated explanations of the findings.

CHAPTER IV

FINDINGS

The objectives of this study were to: (a) identify the personality traits most desired in corporate trainers; (b) prioritize those traits in the order which the respondents believed were most important to achieving competency as a trainer; (c) identify the sources for trainers within the organization; and (d) identify what additional internal or external train-the-trainer training is provided to people who are selected to be trainers.

The study consisted of two parts: the first part accomplished objective (a). A sample of the population selected those traits that were the most desirable for a trainer from a list of 100 personality traits. The second part accomplished the rest of the objectives of the study through a questionnaire that was sent to a different sample of the population.

Part One of the Study

Of the 450 surveys sent, 11 were not deliverable to the addressee. One hundred twenty-eight (a response rate of 29.1%) of the remaining surveys were returned and analyzed.

The list of 100 traits included in the survey included two reliability checks. The first check was the placement of two traits that are synonyms, *reliable* and *dependable*, in different locations in the list. The second check was including the same trait, *logical*, two times in different locations in the list. The responses to the importance of the 100 traits were tabulated in two ways. Appendix C is a list of the responses listed in descending order of mean. Appendix D is a list of the responses in order of survey item number.

Table I, which is excerpted from Appendix C, identifies the top ten traits in descending order of mean, and the ranks of the means of the duplicate reliability check. The top ten traits include the synonym reliability check.

The means of the personality traits *reliable* and *dependable* ranked number 4 and 5m respectively. Because they were synonyms and the mean ranks were not significantly different using a t-test, *dependable* was not included in the second survey.

Although *logical* appears in positions 47 and 91 in the original list, the means of importance ranked in positions number 34 and 35. The means were not significantly different using a t-test.

TABLE I
MEANS OF IMPORTANCE RATINGS OF PERSONALITY TRAITS
RANKED BY MEAN

Traits	Rank by mean	Survey Item no.	M	SD
Confident	1	17	5.656	0.581
Enthusiastic	2	74	5.609	0.564
Open minded	3	18	5.602	0.644
Dependable	4	56	5.591	0.638
Reliable	5	86	5.559	0.638
Honest	6	84	5.5	0.732
Trustworthy	7	40	5.441	0.813
Conscientious	8	4	5.43	0.739
Energetic	9	53	5.425	0.718
Sincere	10	33	5.386	0.746

Logical	34	47	4.583	0.947
Logical	35	91	4.57	0.945

T-tests were used to compare the mean of the trait that ranked number 1, *confident*, with the mean of each subsequent trait to determine the point at which a significant

difference occurred. The first significant difference at the 0.01 level occurred at trait number 10, *sincere*. This served to determine the cut-off point for traits to be included in the second part of the study.

Part Two of The Study

Questionnaires were sent to a sample of 450 of the population for this study. Twelve were returned as undeliverable to the addressee. Ninety four questionnaires were returned for a response rate of 20.9%.

Profile of the Respondents

The responses to the general information section of the questionnaire indicated that 90.4% of the 94 respondents were involved in the hiring or selection of trainers. The data in their 85 surveys were included in the analysis of the ranking of the personality traits in section 1 of the questionnaire. The data in the surveys of all 94 respondents were used in the analysis of responses that did not require opinions, sections 2, 3, and 4 of the questionnaire.

The responses recorded in Table II indicated the actual job titles of the respondents. The results indicate 88.2% had the title of either Vice President, Director, or Manager. The question provided a space for respondents to list job titles that were not included in the provided choices. The other responses included Supervisor (6), New Business Developer (1), Assistant Director (1), and Coordinator (1). Job titles were provided by 91 of the respondents.

TABLE II
RESPONDENTS BY JOB TITLE

Title	f	% of responses
Vice President	6	6.5
Director	28	30.1
Manager	48	51.6
Other		
Supervisor	6	6.5
New Business Developer	1	1.1
Assistant Director	1	1.1
Coordinator	1	1.1
No response	3	

Another general information question asked the survey sample to indicate the number of employees in their division or company. Their responses are tabulated in Table III. This table indicates that 81.7% of the respondents were from companies with more than 100 employees and 19.3% were from companies with fewer than 100 employees. All but one of the 94 respondents answered this question.

TABLE III
RESPONDENTS BY NUMBER OF EMPLOYEES

Number of employees	f	% of responses
1 – 99	18	19.3
100 - 499	13	13.9
500 – 999	12	12.9
1000 – 4999	29	31.3
over 5000	21	22.6
No response	1	

The general information section of the questionnaire asked for the amount of the training budget for the year 1998. Table IV represents the results of those responses.

TABLE IV
RESPONDENTS BY TRAINING BUDGET

Training budget (in thousands)	f	% of responses
\$1 - \$99	29	31.2
\$100 - \$ 249	17	18.3
\$ 249 - \$ 499	15	16.1
\$ 500 - \$ 999	15	16.1
Over \$1 Million	17	18.3
No response	1	

The training budget of 29 (31.2%) of the respondents did not exceed \$99,000. Budgets include many items such as salaries, facilities overhead, and expenditures for outside activities such as seminars, materials, and services. The question in the survey simply asked for the 1998 training budget. Only one respondent did not provide budget information.

The question in the general information section that asked for the number of trainers in the organization was very specific. The question included a description of the job functions to be considered by the respondents when they were determining their response. As represented in Table V, 58.4% of the respondents were from organizations with 10 or fewer trainers, and 79.6% of them were from organizations with fewer than 20 trainers. All 94 respondents provided an answer to this question.

TABLE V
RESPONDENTS BY NUMBER OF TRAINERS

Title	f	% of responses	cumulative %
0	2	2.1	2.1
1 - 5	39	41.4	43.5
6 - 10	14	14.9	58.4
11 - 15	12	12.7	71.2
16 - 20	8	8.5	79.6
Over 20	19	20.2	100.0

Personality Traits

The primary purpose of this study was to ascertain which are the most important personality traits for a trainer. The data from the first section of the questionnaire contained a list of ten traits that were ranked in order of importance. The most important was ranked as number 1 and the least important as number 10.

The responses of the 85 survey respondents who were involved in the decisions about hiring or selecting trainers were evaluated for inclusion in the data tabulation from this section. Seventy-five of them completed this question according to the directions. Their rankings of the importance of the personality traits are presented in ascending order of means in Table VI.

In an effort to compare the responses to the ranking of personality traits to the results from the rating of the personality traits in the first part of the study, Table VII was tabulated. The top three traits as determined by rating and ranking were *confident*, *enthusiastic*, and *open-minded*. The last two items in this list, *nurturing* and *cautious*, were in the same order in the ranking and the rating list.

TABLE VI
PERSONALITY TRAITS IMPORTANCE RANKINGS

Trait	Rank	M	SD
Confident	1	3.593	2.088
Enthusiastic	2	4.0	2.263
Open minded	3	4.667	2.572
Honest	4	4.901	2.391
Dependable	5	4.951	2.643
Energetic	6	4.962	2.584
Trustworthy	7	4.963	2.303
Conscientious	8	6.037	2.726
Nurturing	9	7.383	2.151
Cautious	10	9.494	1.545

TABLE VII
IMPORTANCE OF PERSONALITY TRAITS SELECTED BY RANK AND RATING

Trait	By rank			By rating		
	Order	M	SD	Order	M	SD
Confident	1	2.593	2.088	1	5.656	0.561
Enthusiastic	2	4.0	2.263	2	5.609	0.564
Open minded	3	4.667	2.572	3	5.602	0.644
Honest	4	4.901	2.391	5	5.5	0.732
Dependable	5	4.951	2.643	4	5.591	0.634
Energetic	6	4.962	2.584	8	5.425	0.718
Trustworthy	7	4.963	2.303	6	5.441	0.813
Conscientious	8	6.037	2.726	7	5.43	0.739
Nurturing	9	7.383	2.151	33	4.602	1.007
Cautious	10	9.494	1.545	67	2.867	1.089

Training Personnel

The number of trainers that were hired or were projected to be hired from outside sources were combined into three groups: 0, 1 to 5, and over 5. The number of companies that responded in each group and the percent of the total responses are presented in Table VIII.

TABLE VIII
NUMBER OF COMPANIES HIRING OR ANTICIPATING HIRING
TRAINERS FROM OUTSIDE OF THE COMPANY

Trainers	1996		1997		1998		1999		2000	
	N	%	N	%	N	%	N	%	N	%
0	39	47.6	32	38.5	32	36.4	26	29.9	30	34.9
1 to 5	37	45.1	40	48.2	44	50.0	48	55.2	41	47.7
over 5	6	7.3	4	13.3	12	13.6	13	14.9	15	17.4

The data indicates that from 29.9% to 47.6% of the companies that responded did not hire or were not planning to hire trainers in any given year. The data does not indicate which companies were not planning any hiring activity in each of the years. The data that shows the actual hiring and planned hiring activity of companies in the years 1996 to 1998, and 1999 and 2000 are presented in Table IX. The number of companies responding and the average number of trainers hired or to be hired by these companies are reported for two brackets: 1 to 5 trainers, and over 5 trainers.

Of the 88 companies reporting data in this section, 14 of them (15.9%) neither had, nor planned to have, any hiring activity during the periods 1996 to 1998, and 1999 and 2000. Fifty one companies (58%) had, or planned to have, hiring activity during both of the time periods. These 51 companies hired an average of 2.1 trainers per year during the period 1996 to 1998 and they planned to hire an average of 4.0 trainers per year during 1999 and 2000.

The data also indicated that 42 of the companies (41.7%) hired an average of 2.6 trainers during the period from 1996 to 1998. During this same time period, 22 of the companies (25%) hired an average of 11.9 trainers. The projected data for the years 1999 and 2000 showed that 41 companies (46.6 %) planned to hire an average of 2.1 trainers and 20 companies (22.7%) planned to hire an average of 17 trainers.

TABLE IX
HIRING PRACTICES OF COMPANIES
FOR 1996 TO 1998 AND 1999 TO 2000

Years	1996 to 1998				1999 and 2000			
	1 to 5 Trainers		Over 5 trainers		1 to 5 Trainers		Over 5 trainers	
	No. Comp.	Aver. No. Trainers	No. Comp.	Aver No. Trainers	No. Comp.	Aver. No. Trainers	No. Comp.	Aver No. Trainers
1996 to 1998 only	9	2.1	4	8.3	---	---	---	---
1999 and 2000 only	---	---	---	---	10	1.9	0	0
Both 1996 to 1998 and 1999 and 2000	33	2.7	18	12.7	31	2.2	20	17

Table X represents the sources of existing trainers hired by responding companies. Each survey participant could indicate as many of the sources as they used and the number of current trainers form these sources.

The largest number of trainers (32.7%) came from the most frequently used source (40.8%), other companies with prior experience as a trainer. People hired directly from college with either an associates degree or a bachelors degree represented 44.2% of the trainers. Colleges were the source used by 18.4% of the companies.

TABLE X
SOURCES OF TRAINERS HIRED FROM OUTSIDE THE COMPANY

Source	No. of Comp.	%	No. of Trainers	%
Directly from college with a BS in human resources	7	5.4	15	2.5
Directly from college with any other bachelors degree	15	11.5	153	25.0
Directly from college with any associates degree	2	1.5	102	16.7
From the military	9	6.9	24	3.9
From the education field	21	16.0	65	10.6
From other companies with prior experience as a Trainer	53	40.8	200	32.7
From other companies with no prior experience as a trainer	17	13.1	42	6.8
Other sources not specified	6	4.6	11	1.8

The number of trainers that were hired or were developed from personnel inside the company were combined into three groups: 0, 1 to 5, and over 5. The number of companies that responded in each group and their percent of the total responses are presented in Table XI.

TABLE XI
NUMBER OF COMPANIES DEVELOPING OR ANTICIPATING
DEVELOPING TRAINERS FROM INTERNAL PERSONNEL

Trainers	1996		1997		1998		1999		2000	
	N	%	N	%	N	%	N	%	N	%
0	29	37.7	22	27.5	21	24.4	18	21.7	24	30.0
1 to 5	37	48.1	43	53.7	47	54.7	48	57.8	44	55.0
over 5	12	15.6	15	18.8	18	20.9	17	20.5	12	15.0

The data indicates that from 21.7% to 31.7% of the companies that responded did not develop trainers from internal sources or were not planning to develop trainers from internal sources in any given year. The data does not indicate which companies were not planning to develop trainers from internal sources in each of the years. The data that shows the actual number of trainers developed from internal sources and the number of companies developing those trainers is presented in Table XII. The number of companies responding and the average number of trainers developed or to be developed from internal sources are reported for two brackets 1 to 5 trainers, and over 5 trainers.

TABLE XII
DEVELOPMENT OF TRAINERS FROM INTERNAL SOURCES
FOR 1996 TO 1998 AND 1999 TO 2000

Years	1996 to 1998				1999 and 2000			
	1 to 5 Trainers		Over 5 trainers		1 to 5 Trainers		Over 5 trainers	
	No. Comp.	Aver. No. Trainers	No. Comp.	Aver. No. Trainers	No. Comp.	Aver. No. Trainers	No. Comp.	Aver. No. Trainers
1996 to 1998 only	15	1.7	3	6.7	---	---	---	---
1999 and 2000 only	---	---	---	---	4	2.0	2	15.0
Both 1996 to 1998 and 1999 and 2000	24	2.4	35	17.2	35	2.8	24	19.0

Of the 90 companies reporting data, 7 of them (7.8%) neither had nor planned to have, any development activity during the periods 1996 to 1998, and 1999 and 2000. Fifty nine companies (65.6%) had or planned to have, development activity during both of the time periods, 1996 to 1998, and 1999 and 2000. These 59 companies developed an average of 3.7 trainers per year during the period 1996 to 1998 and anticipated developing an average of 4.7 trainers per year for the period 1999 and 2000.

The data also indicates that 39 of the companies (43.3%) developed an average of 2.1 trainers from internal sources during the period from 1996 to 1998. During this same time period, 38 of the companies (42.2%) hired an average of 16.4 trainers. The projected data for the years 1999 and 2000 showed that 39 companies (43.3%) planned to develop an average of 2.7 trainers, and 26 companies (28.9%) planned to develop an average of 18.7 trainers from internal sources.

Table XIII represents the job titles of the current trainers who were developed within the organizations. The largest number of trainers (31.5%) were line workers. The second largest number (28.1%) were managers. The sources most used by companies (28.2% in both cases) were managers and staff workers.

TABLE XIII
PRIOR JOBS OF TRAINERS DEVELOPED FROM
INSIDE THE COMPANY

Source	No. of Comp.	%	No. of Trainers	%
Manager	40	28.2	179	28.1
Supervisor	32	22.5	114	17.9
Foreman	4	2.8	11	1.7
Line worker	26	18.3	200	31.5
Staff worker	40	28.2	132	20.8

The importance of subject matter expertise (SME) in the initial selection or hiring of training is represented by the data in Table XIV. 25% of the respondents indicated that SME was of little or no importance in the selection of trainers and 31.5% indicated it was very important. Two of the survey respondents did not provide a response to this question.

TABLE XIV
IMPORTANCE OF SUBJECT MATTER EXPERTISE

Importance	Number of responses	%
Not important	5	5.4
Of limited importance	18	19.6
Moderately important	40	43.5
Very important	29	31.5

Training of trainers

Five and four tenths percent of the companies did not provide any training to their trainers during the first year, and 62% provided both internal and external training to their trainers. Table XV represents the number of hours of internally provided and externally provided train-the-trainer training during the first year as a trainer. Internal training was provided by 91.9% of the companies. About seventy-two percent of the organizations used external training for their trainers

TABLE XV
COMPANIES PROVIDING TRAIN-THE-TRAINER TRAINING
DURING THE FIRST YEAR AS A TRAINER

Hours	Internally provided		Externally provided	
	No.	%	No.	%
0	7	8.1	22	28.2
1 – 9	23	26.7	19	24.4
10 – 39	24	27.9	20	25.6
40 – 79	17	19.8	15	19.2
over 80	15	17.5	2	2.6

The subject matter of internal and external train-the-trainer training programs is shown in Table XVI. The five subjects most frequently provided internally (52.3% of the responses) were: facilitation skills, presentation skills, adult learning theory, coaching skills, and interpersonal skills. The five subjects most frequently provided (62.3% of the responses) from external sources were: instruction design, facilitation skills, presentations skills, adult learning theory, and task and needs analysis.

TABLE XVI
SUBJECTS OF TRAIN-THE-TRAINER TRAINING PROVIDED
BY COMPANIES DURING THE FIRST YEAR AS A TRAINER

Subject	Internally provided		Externally provided	
	No.	%	No.	%
Facilitation skills	62	12.9	32	12.9
Presentations skills	59	12.3	30	12.1
Adult learning theory	49	10.2	27	10.8
Coaching skills	41	8.6	9	3.6
Interpersonal skills	40	8.3	10	4.0
Instruction design	37	7.7	40	16.1
Training theory	30	6.3	17	6.9
Questioning skills	30	6.3	9	3.6
Task & needs analysis	25	5.2	26	10.4
Leadership skills	24	5.0	11	4.4
Performance evaluation	24	5.0	6	2.4
Problem solving	23	4.8	5	2.0
Writing skills	15	3.2	11	4.4
Negotiation skills	8	1.7	4	1.6
Cost benefit analysis	5	1.0	8	3.2
Others not listed	8	1.7	4	1.6

To assess the data in terms of the subjects that were most often the subject of training regardless of the source, Table XVII was created. The subjects were listed in descending order of frequency of times mentioned by the responding companies. The four

most frequently mentioned subjects, representing 46.1% of the responses, were facilitation skills, presentation skills, instruction design, and adult learning theory. The least mentioned subjects of those provided as choices were cost benefit analysis and negotiation skills.

TABLE XVII
SUBJECTS OF TRAIN-THE-TRAINER TRAINING
INTERNALLY OR EXTERNALLY PROVIDED BY COMPANIES
DURING THE FIRST YEAR AS A TRAINER

Subject	No. of responses	%
Facilitation skills	94	12.9
Presentation skills	89	12.2
Instruction design	77	10.6
Adult learning theory	76	10.4
Task & needs analysis	51	7.0
Coaching skills	50	6.9
Interpersonal skills	50	6.9
Training theory	47	6.4
Questioning skills	39	5.4
Leadership skills	35	4.8
Performance evaluation	30	4.1
Problem solving	28	3.8
Writing skills	26	3.6
Cost benefit analysis	13	1.8
Negotiation skills	14	1.6
Others not listed	14	1.6

The respondents who indicated the subject material of externally provided training were asked to check the sources they used to provide that training. These data are tabulated in Table XVIII. The most frequently used source (33.9%) was multi-day seminars, and the next most frequently used source (31.6%) was one-day seminars.

TABLE XVIII
SOURCES OF EXTERNALLY PROVIDED
TRAIN-THE-TRAINER TRAINING

Source	Number of responses	%
Multi-day seminars	58	33.9
One day seminars	54	31.6
Videotape or other media	32	18.7
Community college	12	7.0
Video conferencing	9	5.3
Vo-tech schools	6	3.5

Summary

The findings in Chapter Four are presented in two parts. The survey items from the first part of the survey are offered in a table that ranked the means in descending order and in another table that listed the means in order of the survey item number.

The responses to the first section of the second survey are presented in a table that depicts the ascending order of the means. Another table compares the results from the first study to the first part of the second study. The data from the section of the survey about the external and internal sources of trainers were presented in tables representing the frequency distributions of responses.

The frequencies of the responses to the questions in the train-the-trainer section and in the general information section were presented in a series of tables.

Conclusions about the meaning of these findings are presented in Chapter Five.

CHAPTER V

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

Summary

The purposes of this study were to identify and prioritize desirable personality traits of trainers as defined by the people who select or hire trainers in the corporate environment, to identify the source of trainers that a company may use, and to define the structure and content of training provided to these trainers during their first year as trainers. The first part of this chapter will summarize the literature that relates to the findings, the methodology, and the findings.

Literature Review

The training function has been an important component of successful job performance for many years. In our early history, apprenticeships served as training environments. In the early part of this century the need for skilled workers required more training and more efficient delivery of training. The significant technological advances highlighted by the launch of *Sputnik* by Russia in 1957 made increasing training even more urgent. The computer age, which began in the 1970s, created an even higher demand for highly skilled workers.

Whereas an increasing demand for training and trainers exists, no standards of performance have been set for these trainers. The ASTD (American Society for Training and Development) saw this need and started a research project in 1978 to address it. The ASTD conducted several research projects over the next decade to further define the competencies needed in the various job roles in the HRD (human resource and

development) field. These studies eventually resulted in a list of desired competencies for each role, a description of the kinds of work that each role performs, and the desired outputs for that work.

Several examples of research have taken this information and further elaborated on it. One study sought to establish which of these competencies were most valued by people hiring trainers. Another study described which of the competencies were most useful from the trainer's perspective. Several of the important competencies that were identified in these and other studies reviewed in the literature had a strong interpersonal aspect. Some examples were coaching skills, listening skills, and instructional flexibility. Personality traits of trainers may influence the demonstration of these competencies.

Several articles suggested that the trainer-trainee relationship has an important impact on the effectiveness of the training. The best results were obtained when there was harmony between the trainer, the trainee, and the program. These and other articles also suggested that the personality traits of the trainer may influence these relationships.

Although it can be argued whether or not it is possible to change basic personality traits once a person has reached adulthood, it is generally accepted that any such changes would not be easy to accomplish and would take some time. Costa and McCrea (1984) stated "that what can change over time are behaviors, attitudes, and interests; but they can change only in ways that are consistent with the individual's basic personality traits."

Several workplace trends that will impact the training profession have been identified. Downsizing has, and will continue to have, an impact. As training departments decrease in size, those remaining trainers will have to assume more responsibilities and become multi-functional. As the size of the general workforce decreases, the remaining workers will need more skills to be able to perform a broader variety of tasks. Reduction in the work force usually means a reduction in the number of senior or more experienced workers. The younger and newer workers require more training to increase their skills.

The nature of the workforce is changing. The number of older workers will continue to increase. These older workers will present a challenge for trainers because it is hard to change behavior patterns that have been established over a period of time. The generation X'ers, those people from 20 to 33 years old, are increasing in numbers in the workforce. They have different learning styles, different values, and different expectations that will place even further demands on the trainers. They expect training and believe it is the duty of the company to provide it.

The trend towards companies becoming learning organizations means that training is increasing as an ongoing activity. This training will continue to be conducted by team leaders, managers, and even peers. The number of trainers that are developed from within an organization will increase. Many workers will assume training functions in addition to their regular duties. In some companies training may be just a temporary assignment or an ad hoc assignment.

The literature review indicates that the need for training will increase in many organizations. The competencies that these trainers need involve many interpersonal components. The ability to exhibit or develop these competencies is influenced by basic personality traits. People who come from the workforce and whose primary job is not training are being called upon to assume training functions. These people are usually selected based upon subject matter expertise and other criteria that do not adequately consider personality traits.

The primary purpose of this study was to identify and rank, in order of importance, those personality traits that people who hire or select trainers felt to be important for trainers. This information would provide additional criteria for making those decisions.

Methodology

The population considered for this study was the Vice Presidents, Directors, and Managers of Training who were members of the Society for Human Resource

Management (SHRM). These people would most likely be responsible for the hiring of trainers and for the selection of those internal personnel who were to become trainers. Two samples of 450 were randomly selected from the 1,302 members of the population.

The study consisted of two parts; the first was to identify the personality traits that the population believed were important for trainers, and the second was to rank those traits in order of importance. Additional information about the sources of externally hired trainers and the job positions of internally developed trainers was gathered. The train-the-trainer training that was provided internally or externally was also solicited.

A list of 100 personality traits was developed for the first part of the study. The list was first sent to a sample of 40 from one sample of 450. This was to test the response rate and solicit information about improving the instrument. The list was then sent to the 410 remaining members of the sample. They were asked to rank the importance of each trait for a trainer on a 6-point Likert type scale ranging from *not important* to *very important*. The means and standard deviations were calculated for the 128 respondents. The results were listed in the descending order of the means.

To select the traits for inclusion in the second survey, a process of comparison was conducted with a t-test comparing the first mean with each succeeding mean to determine the first point at which a significant difference of the means occurs. That point was between traits 9 and 10.

Because the synonymous traits, *dependable* and *reliable*, were ranked by the respondents within the top nine and these means were not significantly different, *reliable* was eliminated. This left a list of eight traits to be included in the second questionnaire. As a reliability check two additional traits were included. The trait, *nurturing*, was taken from position 33 in the ranking by mean, and the second, *cautious*, from position 67 in the ranking by mean. This list of ten traits became part one of the second questionnaire.

The second instrument consisted of four parts. The first section was the list of the ten personality traits from the first part of the study. These traits were to be ranked from 1

to 10 in order of importance with 1 being *most important*. The second section contained questions about the number and sources of trainers in the organization. The third part asked for information about train-the-trainer training that the company provided. The fourth part solicited general information about the company and the responder. The instrument was sent to another random sample of 40 from a different sample of 450. The purpose was to test the response rate and to solicit information for improving the instrument. This questionnaire was slightly modified and sent to the remaining 410 members of the sample. The response rate for this survey was 20.9%.

The responses to the first question were analyzed by calculating the means and standard deviations. The results were presented in a table that listed the traits in ascending order of the means. The frequency of responses to the rest of the questions were presented in a number of tables.

Findings

The first part of the study yielded a priority listing of personality traits that the respondents believed were valuable for trainers. The purpose of this part of the study was to validate the selection of traits that were to be used in the second part of the study. The traits with the eight highest means were chosen and two additional traits were added as a reliability check.

The second survey addressed the primary research question and two additional areas of interest. The first area asked the respondents to rank the ten traits in order of perceived importance for a trainer. The three personality traits with the highest means were: confident, enthusiastic, and open-minded. This agreed with the ranking of means of the top three traits from the first part of the survey which presented the sample with 100 traits and asked them to rate the importance of these traits for a trainer.

The second focus of this research was to identify internal and external sources of trainers. The number of companies that hired trainers increased from 52.4% in 1996 to

63.6% in 1998. The percentage of companies projected to hire trainers in 1999 rose to 70.1%, but the anticipated hiring in 2000 fell to 65.1% of the companies. Fifty-one companies had or anticipated having hiring activity during the years 1996 to 2000. They hired an average of 2.1 trainers per year during the period 1996 to 1998 and anticipated hiring an average of 4 trainers per year during the period 1999 to 2000.

The largest number of trainers (32.7%) were hired from other companies where they had experience as trainers. Another large source (27.5%) was directly from college with a bachelor's degree. The third largest source (16.7%) was directly from college with an associate's degree.

The number of companies that developed trainers from internal personnel rose from 63.7% in 1996 to 75.6% in 1998. The number of companies projecting development of trainers from internal sources rose to 78.3% in 1999 and decreased to 70% in 2000. Fifty-nine companies had or anticipated having trainers developed from internal sources during the years 1996 to 2000. These companies developed an average of 3.7 trainers per year during the period 1996 to 1998 and anticipated developing an average of 4.7 trainers per year during the period 1999 and 2000.

The largest number of trainers (31.5%) were from the ranks of line workers. The second largest source (28.1%) came from management.

One consideration in hiring or developing trainers is their subject matter expertise. When asked to indicate the level of importance subject matter expertise had in their selection process, 31.5% of the respondents believed that it was very important. 43.5% checked moderately important, and 25% believed it was of little or no importance.

The third area of interest for this research involved the training that is provided to trainers during their first year as trainers. Train-the-trainer training was provided internally by 91.9% of the companies during the first year. The five subjects most frequently provided internally (52.3% of the responses) were: facilitation skills, presentation skills, adult learning theory, coaching skills, and interpersonal skills.

Train-the-trainer training was externally provided by 71.8% of the companies. The five subjects most frequently provided (62.3% of the responses) from external sources were: instruction design, facilitation skills, presentations skills, adult learning theory, and task and needs analysis. When the data about the internally and externally provided subjects were combined, the most frequently provided subjects were facilitation skills, presentation skills, instruction design, and adult learning theory.

The most frequently used source of external training (33.9% of the responses) was multi-day seminars, and the next most frequently used (31.6%) was one-day seminars.

A section of the second questionnaire asked for general information about the respondent and his or her company. The titles, company size, and training budgets for 1998 were tabulated to give a profile of the respondent. One question that asked if the respondent was responsible for the hiring or selecting of trainers was answered affirmatively by 90.4% of the respondents.

The titles most frequently indicated were: manager (51.6%), and director (30.1%). Company sizes ranged from under 100 employees (19.3%) to over 5000 (22.6%). Training budgets ranged from under \$100,000 (31.2%) of the respondents to over \$1 million (18.3%). The number of trainers in the organizations ranged from 5 or fewer (43.5% of the responses) to over 20 (20.2% of the responses).

Conclusions

The following conclusions were drawn from the data developed in this study.

Profile of the Sample

The respondents to the survey were those people within their organizations who were responsible for the hiring and selection of trainers. Their opinions about the importance of specific personality traits for trainers were relevant to the purpose of this study.

The respondents represented organizations of various sizes. Because they were selected from the general membership of SHRM, they represented a broad variety of types of businesses. Their conclusions may not be representative of a specific industry or of a specific type of organization.

The question about the 1998 training budget did not specify what was to be included in that figure so any conclusions based on the training budget for 1998 would not be valid.

Personality Traits

The results of the internal reliability checks included in the list of 100 traits used in the first portion of the study and in the first part of the second questionnaire indicated that this sample did not randomly respond to these sections.

Analysis of the data indicated that the three most important personality traits for a trainer were: *confidence*, *enthusiasm*, and *open-mindedness*

Some internal validation of these results exists. The same top three traits from this portion of the study were the top three traits from the first part of the study that used a different sample of the population. Furthermore, the order of the means was the same.

Hiring and Selection of Training Personnel

The data indicates a trend in the number of companies hiring trainers in each year from 1996 through 1998. The number of companies planning to hire in 1999 continued this trend and the number planning to hire in 2000 reversed this trend. The figures for 1996 through 1998 represented actual numbers. The number for 1999 probably represented budgeted numbers as the survey was conducted late in 1998, while the figures for 2000 were more likely based on estimates. Therefore, the researcher would not consider the figures for the year 2000 to be as reliable as the figures for the other years.

The trend of increasing hiring of trainers is supported by other studies and articles found in the literature review.

In analyzing the sources of trainers already on staff, the data indicated that 51% of the trainers that were hired most likely had no prior experience as trainers. These trainers were hired directly from college and from other companies without prior experience as trainers. The primary source for trainers (40.8% of the responding companies) was hiring trainers from other companies. The study indicates that no consistent value is placed on prior training experience. This study did not ask for the degrees of all trainers on staff. Presumably these new hires would receive some train-the-trainer training.

Trends are indicated by the organizations that reported the development of trainers from internal sources. The number of companies developing trainers increased each year from 1996 to 1998. A further increase was predicted for the year 1999. Several articles in the literature predicted this trend (Hequet, 1995, Benson, 1997, Filipczak, 1996). Internal sources provided and were predicted to provide more trainers than external sources. Companies may be placing a higher value on the benefits of using people who are familiar with the company culture and who are familiar with the personnel.

When the companies reported the job titles of the sources of the internally developed trainers, the data indicated that these companies selected people fairly evenly from among the ranks of managers, supervisors, line workers, and staff workers. The low response for *foreman* occurred because many companies do not use this job title. The job functions of foreman and supervisor are similar. In the opinion of the researcher, these data should be combined. It does not appear that seniority of title was a prerequisite to becoming a trainer.

Subject matter expertise did not appear to be as important as the literature indicated. Twenty-five percent of the companies indicated it was of little or no consideration in their selection of people to become trainers. Some companies may believe they can train people on the subject provided those people have some competencies that a trainer needs.

Conversely, those companies that indicated that subject matter expertise was very important may have concluded that they can provide training skills easier than subject knowledge.

Train-the-Trainer Training

Almost 95% of the responding companies provided some training for trainers during their first year on the job. More companies provided internal training than utilized external training. Companies place a value on training their trainers and are willing to invest in the training process. Almost 50% of the trainers hired, and most likely most of the trainers developed from within, have no prior training experience.

Facilitation skills, presentation skills, instructional design, and adult learning theory were the most frequent subjects of training. The literature states that competencies in facilitation and presentations are among the most desired and most used by trainers. The subjects of instruction design and adult learning are mentioned in the literature as skills that would increase in importance for trainers. Companies appear to recognize that need. One article that was reviewed in the literature stated that trainers in the future will have to assume the role of purchasing training from outside sources and skills such as cost benefit analysis and negotiations would be important. These two traits were ranked as the lowest of the subjects provided. Apparently companies have not moved trainers into this role or they may not place a value on these skills.

Videotape and other media sources are indicated in the literature to be an increasing source of training. In this study 18.7% of the companies used videotape to train the trainers. Almost 65% of the companies used one-day or multi-day seminars from external providers to train their trainers. Seminars are usually presented by live trainers in a classroom environment. The literature states that face to face is still the predominate way that training is delivered.

Recommendations

The following recommendations were developed from the findings and conclusions of this study.

1. A survey instrument for measuring the personality traits of *confidence*, *enthusiasm*, and *open-mindedness* should be used as a screening tool by people responsible for hiring and developing trainers.

2. Career planners, job counselors, and guidance counselors should consider the importance of confidence, enthusiasm, and open-mindedness to people hiring trainers. Tests for the presence of these traits should be conducted before recommending training as a career to their clients.

3. Institutions preparing people for a career in the training industry should present programs to develop the skills and attitudes that would reinforce confidence, enthusiasm, and open-mindedness.

4. Individuals or companies developing training programs for trainers should consider the importance of confidence, enthusiasm, and open-mindedness and should create programs to enhance behaviors that would reinforce these traits.

5. Individuals considering careers as trainers should consider the importance of confidence, enthusiasm, and open-mindedness to the people hiring trainers. They should be assessed for the presence of these traits and select courses that would develop behaviors to reinforce these traits.

Recommendations for further research

1. Research should be conducted to investigate the existence of an instrument to measure the desired personality traits of *confidence*, *enthusiasm*, and *open-mindedness* for trainers. If no such instrument exists, then one should be developed and validated.

2. This study used members of the Society of Human Resource Management as the population. A study should be conducted to determine if the same opinions are held by non-members who are responsible for the hiring or selection of trainers..

3. A similar study should be conducted to determine opinions of trainees of the desirable personality of trainers.

4. Further studies should be undertaken to correlate the presence of these traits in trainers to their effectiveness as trainers.

5. Because most of the population were from industry, a similar study should be conducted to determine the desirable personality traits for educators in primary, secondary, and post-secondary schools.

6. A similar study should be conducted to determine the desirable personality traits for trainers in the military.

BIBLIOGRAPHY

- Anastasi, A. (1994). Aptitude testing. In the *Encyclopedia of Human Behavior*, (Vol 1, pp. 211-221). New York: Academic Press.
- Bachler, C. J. (1997). The trainer's role is turning upside down. *Workforce*, 76 (6). 93-105.
- Bassi, L. J., Benson, G., & Cheney, S. (1996). The top ten trends. *Training & Development*, 50 (11), 28-42.
- Benson, G. (1997). Informal training takes off. *Training & Development*, 51 (5), 93-94.
- Broadwell, M. (1982). Professional development for new trainers. *Training and Development Journal*, 36 (5), 69-72.
- Brody, N. (1994). Traits. In the *Encyclopedia of Human Behavior*, (Vol 4, pp. 419-425). New York: Academic Press.
- Bushe, G. , & Gibbs, B. (1990). Predicting organizational development competence from the Myer-Briggs type indicator and stage of ego development. *The Journal of Applied Behavioral Science*, 26 (3), 337-357.
- Byrne, J.A. (1992, August 31). Management's new gurus. *Business Week*, 44-52.
- Carmel, N. (1991). Evaluating trainers. *Successful Meetings*, 40 (3). 123.
- Cattell, R.B. (1943). The description of personality: Basic traits resolved into clusters. *Journal of Abnormal & Social Psychology*, 38, 476-506.
- Caudron, S. (1997). Can generation x'ers be trained? *Training & Development*, 51 (3), 20-24.
- Clark, R. C., & Kyker, P. (1985). How to select good technical instructors. *Training*, 22 (12), 54-62.
- Cooper, G. (1977). Adverse and growthful effects of experiential learning groups: The role of trainers, participant, and group characteristics. *Human Relations*, 30 (12), 1103-1129.
- Costa, Jr., P. T., & McCrae, R. B. (1994). Set in plaster? Evidence for the stability of adult personality. In T.F. Heatherton & J.L. Weinberger (Eds.), *Can personality change?* (pp. 175-198). Washington, DC: American Psychological Association.
- Cox, J. (1996). *Your opinion, please!* Thousand Oaks, CA: Corwin Press.

- Cusimano, J. M. (1996). Managers as facilitators. *Training & Development*, 50 (9), 31-33.
- DiClemente, C.C. (1994). If behaviors change can personality be far behind? In T.F. Heatherton & J.L. Weinberger (Eds.), *Can personality change?* (pp. 175-198). Washington, DC: American Psychological Association.
- Dingus, B. W. (1990). Competencies of entry level trainers as expected by executives of Fortune 500 companies (Doctoral dissertation, Ohio University, 1990). *UMI Dissertation Services*, Ann Arbor, MI, AAT9033547.
- DiPaolo, A. J., & Patterson, A. C. (1983). Selecting a training program for new trainers. *Training and Development Journal*, 37 (1), 96-101.
- Dumas, M. A., & Wile, D. E. (1992). The accidental trainer: Helping design instruction. *Personnel Journal*, 71 (6), 106-110.
- Edwards, A. (1970), *The measurement of personality traits by scales and inventories*. New York,: Holt, Rinehart, and Winston.
- Epstein, S. (1988), The stability of behavior across time and situations. In R.A. Zucker, J. Arnaoff, & A.I. Rabin (Eds.), *Personality and the prediction of behavior* (pp. 209-268). Orlando, FL: Academic Press.
- Filipczak, B. (1996). Just passing through. *Training*, 33 (4), 60-64.
- Flannagan, D. (1983). Checking out your training personality. *Training*, 20 (1), 26-28.
- Furst-Bowe, J. (1996). An analysis of the competencies needed by trainers to use computer-based technologies and distance learning systems. *Performance Improvement Quarterly*, 9 (4), 57-78.
- Galagan, P. (1994). Reinventing the profession. *Training & Development*, 48 (12), 20-27.
- Georges, J. C. (1996). The myth of soft-skills training. *Training*, 33 (1), 48-54.
- Hendon, D., & Barlow, H. (1985). Why training fails and what to do about it. *Training*, 22 (12), 74-85.
- Hequet, M. (1995). The new trainer. *Training*, 32 (12) 23-30.
- Hillman, L. (1989). Ways and means. *Training and Development Journal*, 43 (9), 28-30.
- Industry report 1997. (1997). *Training*, 34 (10), 39-75.
- Leach, J. A., & Sandall, D. L. (1995). Required business skills for training professionals. *Journal of Industrial Teacher Education*, 32 (X), 74-86.
- Lee, C. (1984). How to hire the right trainer. *Training*, 21 (8), 22-32.
- Lee, C. (1991). What's your style? *Training*, 28 (5), 27-35.

- Luoma-Overstreet, K. (1993). Developers and deliverers: The potential dichotomy. *Performance and Instruction*, 32 (8), 20-25.
- Luthy, J. F. (1991). Identification and validation of functional skills necessary for practitioner competence in a corporate human resource training environment (Doctoral dissertation, University of Idaho, 1991), *UMI Dissertation Services*, Ann Arbor, MI AAT9217648.
- Maddocks, P., & Yelon, S. (1986). Identifying trainer competencies. *Performance & Instruction*, X (11), 9-12.
- McLagan, P. A. (1983). Models for excellence: the results of the ASTD training and development competency study. *Training and Development Journal*, 37 (6), 10-20.
- McLagan, P. A. (1989). Models for HRD practice. *Training and Development Journal*, 43 (9), 49-59.
- McLagan, P. A. (1997). Competencies: the next generation. *Training & Development*, 51 (5), 40-47.
- O'Brien, R. (1985). Using Jung more and etching him in stone less. *Training*, 22 (5), 53-66.
- Olson, S. J. (1994). Competencies of two-year college technical instructors and technical trainers: Similarities and differences. *Journal of Industrial Teacher Education*, 32 (1), 65-85.
- Parry, S. B. (1996). The quest for competencies. *Training*, 33, (7), 49-56.
- Phillips, J. (1996). ROI: the search for best practices. *Training & Development*, 50 (2), 42-47.
- Rosenbaum, B., & Baker, B. (1979). Do as I do: The trainer as a behavior model. *Training*, 16 (12), 90-93.
- Rothwell, W. J., & Sredl, H. J. (1992). *The ASTD reference guide to professional human resource development roles and competencies* (2nd ed.). Amherst, MA: HRD Press.
- Saklofske, D. & Eysenck, H. (1994). Extraversion - Introversion. In the *Encyclopedia of Human Behavior* (Vol. 2, pp. 321-332). New York: Academic Press.
- Simmons, J. B. (1994). Industrial training competency requirements as reported by training personnel (Doctoral dissertation, University of Kentucky, 1994), *UMI Dissertation Services*, Ann Arbor, MI AAT9426183.
- Strack, S. (1997). The PACL: Gauging normal personality styles. In T. Millon (ed.), *The Millon inventories*. New York: Guilford Press.
- Strack, S., & Lorr, M. (1997). Invited essay: The challenge of differentiating normal and disordered personality. *Journal of Personality Disorders*, 11 (2), 105-122.
- Straub, C. (1992). How do I find a training star? *Training & Development*, 46 (5), 75-79.

Weinberger, J.L. (1994). Can personality change? In T.F. Heatherton & J.L. Weinberger (Eds.), *Can personality change?* (pp. 333-350). Washington, DC: American Psychological Association.

APPENDIXES

APPENDIX A
LETTER MAILED WITH THE
FIRST SURVEY

OKLAHOMA STATE UNIVERSITY



Center for Aviation and Space Education
Oklahoma State University
Stillwater, Oklahoma 74078-8034
Office (405) 744-7015
Fax (405) 744-7785

July 17, 1998

Dear fellow SHRM member,

As the person responsible for the development of trainers in my company, I have come to realize that it takes more than good platform skills to be a good trainer. It takes a certain personality to be able to relate to the trainees to motivate them to be the best they can. I also realize that the responsibility of selecting the right person as a trainer is a key element in the success of the training process. I have been looking for a tool that would help me do better in this selection process.

That brings me to the purpose of this letter. I am a doctoral student at Oklahoma State University. I have chosen this issue as the subject for my dissertation. To that end, I would appreciate your input. The first step in the process is to define those personality traits you feel would be important for a successful trainer to have.

I understand your time is very valuable so I have designed the enclosed survey in a way that you should be able to complete it in less than 15 minutes. Answering all questions will make this a more scientifically valid survey so I would appreciate your careful thought as you answer.

What's in it for you? Well, first of all, appreciation for contributing to the field of training and development. In addition, if you complete the survey and would like a summary of the results, please enclose your business card. I will be happy to send it to you. The results should help you and others in your company to be more effective at recruiting and developing trainers.

Even though there are no sensitive questions, let me assure you that confidentiality will be maintained. I will be the only person summarizing the information. No individual sources will be identified in the study.

Two requests: please answer all questions (it should take only a few minutes), and please respond within a few days so the results can get back to you in a timely manner. A self-addressed stamped envelope is included for your convenience. Your response is very important. Only a small sample of my fellow SHRM members have been selected to participate and a high percentage of return is necessary for a successful study.

If you have any questions or would like further information about this study, please contact Bob Layne at 9000 Allison Lane, Oklahoma City, OK 73151, (405) 947-2111.

Sincerely,

A handwritten signature in black ink, appearing to read 'Bob Layne'.

Bob Layne
Doctoral Student
Oklahoma State University

Sincerely,

A handwritten signature in black ink, appearing to read 'Kenneth E. Wiggins'.

Kenneth E. Wiggins
Professor and Head

APPENDIX B

SURVEY INSTRUMENT FOR THE

FIRST SURVEY

PERSONALITY TRAITS

Please indicate your opinion of the importance of each listed trait as it relates to the effectiveness of a trainer. (**circle** the appropriate number)

Personality trait	not important					very important
1. Tolerant	1	2	3	4	5	6
2. Manipulative	1	2	3	4	5	6
3. Helpful	1	2	3	4	5	6
4. Conscientious	1	2	3	4	5	6
5. Opportunistic	1	2	3	4	5	6
6. Nurturing	1	2	3	4	5	6
7. Egocentric	1	2	3	4	5	6
8. Impulsive	1	2	3	4	5	6
9. Bold	1	2	3	4	5	6
10. Cautious	1	2	3	4	5	6
11. Self-controlled	1	2	3	4	5	6
12. Serious	1	2	3	4	5	6
13. Inflexible	1	2	3	4	5	6
14. Tense	1	2	3	4	5	6
15. Discreet	1	2	3	4	5	6
16. Curious	1	2	3	4	5	6
17. Confident	1	2	3	4	5	6
18. Open-minded	1	2	3	4	5	6
19. Relaxed	1	2	3	4	5	6
20. Gullible	1	2	3	4	5	6
21. Frank	1	2	3	4	5	6
22. Domineering	1	2	3	4	5	6
23. Passive	1	2	3	4	5	6
24. Inhibited	1	2	3	4	5	6
25. Fanatical	1	2	3	4	5	6
26. Modest	1	2	3	4	5	6
27. Discriminating	1	2	3	4	5	6
28. Trusting	1	2	3	4	5	6
29. Nosy	1	2	3	4	5	6
30. Forceful	1	2	3	4	5	6
31. Witty	1	2	3	4	5	6
32. Sarcastic	1	2	3	4	5	6

PLEASE TURN THE PAGE

Personality trait	not important					very important
33. Sincere	1	2	3	4	5	6
34. Aggressive	1	2	3	4	5	6
35. Polite	1	2	3	4	5	6
36. Likable	1	2	3	4	5	6
37. Sympathetic	1	2	3	4	5	6
38. Resentful	1	2	3	4	5	6
39. Ambitious	1	2	3	4	5	6
40. Trustworthy	1	2	3	4	5	6
41. Conservative	1	2	3	4	5	6
42. Creative	1	2	3	4	5	6
43. Conventional	1	2	3	4	5	6
44. Accepting	1	2	3	4	5	6
45. Distant	1	2	3	4	5	6
46. Charismatic	1	2	3	4	5	6
47. Logical	1	2	3	4	5	6
48. Condescending	1	2	3	4	5	6
49. Humorous	1	2	3	4	5	6
50. Orderly	1	2	3	4	5	6
51. Strong willed	1	2	3	4	5	6
52. Judging	1	2	3	4	5	6
53. Energetic	1	2	3	4	5	6
54. Outspoken	1	2	3	4	5	6
55. Optimistic	1	2	3	4	5	6
56. Dependable	1	2	3	4	5	6
57. Reflective	1	2	3	4	5	6
58. Spontaneous	1	2	3	4	5	6
59. Compulsive	1	2	3	4	5	6
60. Excitable	1	2	3	4	5	6
61. Agreeable	1	2	3	4	5	6
62. Comforting	1	2	3	4	5	6
63. Flattering	1	2	3	4	5	6
64. Anxious	1	2	3	4	5	6
65. Realistic	1	2	3	4	5	6
66. Thorough	1	2	3	4	5	6
67. Arrogant	1	2	3	4	5	6

PLEASE GO TO THE NEXT PAGE

Personality trait	not important					very important
68. Intimidating	1	2	3	4	5	6
69. Competitive	1	2	3	4	5	6
70. Disciplined	1	2	3	4	5	6
71. Talkative	1	2	3	4	5	6
72. Suspicious	1	2	3	4	5	6
73. Respectful	1	2	3	4	5	6
74. Enthusiastic	1	2	3	4	5	6
75. Sociable	1	2	3	4	5	6
76. Yielding	1	2	3	4	5	6
77. Temperamental	1	2	3	4	5	6
78. Courageous	1	2	3	4	5	6
79. Rigid	1	2	3	4	5	6
80. Pessimistic	1	2	3	4	5	6
81. Understanding	1	2	3	4	5	6
82. Cheerful	1	2	3	4	5	6
83. Casual	1	2	3	4	5	6
84. Honest	1	2	3	4	5	6
85. Opinionated	1	2	3	4	5	6
86. Reliable	1	2	3	4	5	6
87. Persevering	1	2	3	4	5	6
88. Natural	1	2	3	4	5	6
89. Dissatisfied	1	2	3	4	5	6
90. Eloquent	1	2	3	4	5	6
91. Logical	1	2	3	4	5	6
92. Deliberate	1	2	3	4	5	6
93. Moody	1	2	3	4	5	6
94. Care-free	1	2	3	4	5	6
95. Humble	1	2	3	4	5	6
96. Idealistic	1	2	3	4	5	6
97. Fair-minded	1	2	3	4	5	6
98. Decisive	1	2	3	4	5	6
99. Generous	1	2	3	4	5	6
100. Grateful	1	2	3	4	5	6

PLEASE LIST THE NUMBERS OF THE FIVE MOST IMPORTANT TRAITS FOR A TRAINER, IN ORDER OF IMPORTANCE:

FIRST _____ SECOND _____ THIRD _____ FOURTH _____ FIFTH _____

Thank you for your opinion.

APPENDIX C

MEANS OF IMPORTANCE RATINGS

RANKED BY MEAN

MEANS OF IMPORTANCE RATINGS OF PERSONALITY TRAITS
RANKED BY MEAN

Personality Trait	Survey Item no.	M	SD
Confident	17	5.656	0.581
Enthusiastic	74	5.609	0.564
Open minded	18	5.602	0.644
Dependable	56	5.591	0.638
Reliable	86	5.559	0.638
Honest	84	5.5	0.732
Trustworthy	40	5.441	0.813
Conscientious	4	5.43	0.739
Energetic	53	5.425	0.718
Sincere	33	5.386	0.746
Helpful	3	5.352	0.79
Thorough	66	5.331	0.702
Respectful	73	5.273	0.92
Creative	42	5.228	0.789
Fair minded	97	5.133	0.797
Tolerant	1	5.079	0.948
Optimistic	55	5.047	0.853
Polite	35	5.016	0.976
Understanding	81	5.008	0.779
Relaxed	19	4.977	0.877
Cheerful	82	4.898	0.877
Persevering	87	4.789	0.977
Curious	16	4.781	0.996
Natural	88	4.781	1.072
Self-controlled	11	4.766	1.076
Likable	36	4.748	0.967
Realistic	65	4.748	0.951
Sociable	75	4.742	1.006
Discreet	15	4.68	1.369

Humorous	49	4.677	0.907
Charismatic	46	4.614	1.062
Discipline	70	4.609	0.998
Nurturing	6	4.602	1.007
Logical	47	4.583	0.947
Logical	91	4.57	0.945
Decisive	98	4.563	1.018
Orderly	50	4.488	0.999
Witty	31	4.438	0.911
Reflective	57	4.425	1.131
Accepting	44	4.31	1.099
Trusting	28	4.273	1.314
Spontaneous	58	4.26	1.093
Courageous	78	4.189	1.326
Sympathetic	37	4.134	1.057
Frank	21	4.109	1.192
Comforting	62	4.0	1.047
Bold	9	3.977	1.27
Eloquent	90	3.859	1.332
Generous	99	3.858	1.239
Ambitious	39	3.795	1.335
Agreeable	61	3.754	1.143
Casual	83	3.727	1.055
Talkative	71	3.703	1.199
Deliberate	92	3.672	1.028
Outspoken	54	3.465	1.259
Serious	12	3.461	1.122
Idealistic	96	3.452	1.309
Grateful	100	3.441	1.451
Humble	95	3.273	1.418
Opportunistic	5	3.211	1.445
Flattering	63	3.198	1.18
Discriminating	27	3.173	1.516
Aggressive	34	3.102	1.296
Strong willed	51	3.031	1.291
Modest	26	3.008	1.151

Yielding	76	2.906	1.09
Cautious	10	2.867	1.089
Excitable	60	2.827	1.431
Forceful	30	2.781	1.236
Conventional	43	2.77	0.985
Competitive	69	2.648	1.252
Conservative	41	2.63	0.998
Care free	94	2.359	1.141
Opinionated	85	2.297	1.206
Impulsive	8	2.258	1.021
Manipulative	2	2.211	1.206
Compulsive	59	1.992	0.988
Judging	52	1.976	1.023
Nosy	29	1.914	1.21
Egocentric	7	1.852	1.123
Domineering	22	1.711	0.932
Anxious	64	1.622	0.835
Suspicious	72	1.617	0.88
Passive	23	1.547	0.912
Rigid	79	1.532	0.731
Dissatisfied	89	1.488	0.958
Fanatical	25	1.477	0.823
Temperamental	77	1.398	0.863
Inhibited	24	1.367	0.651
Gullible	20	1.32	0.627
Sarcastic	32	1.313	0.612
Inflexible	13	1.273	0.801
Distant	45	1.252	0.471
Pessimistic	80	1.227	0.55
Moody	93	1.227	0.536
Tense	14	1.203	0.58
Condescending	48	1.181	0.569
Arrogant	67	1.134	0.385
Intimidating	68	1.125	0.452
Resentful	38	1.118	0.348

APPENDIX D

MEANS OF IMPORTANCE RATINGS RANKED
BY SURVEY ITEM NUMBER

MEANS OF IMPORTANCE RATINGS OF PERSONALITY TRAITS
RANKED BY SURVEY ITEM NUMBER

Personality Trait	Survey Item no.	M	SD
Tolerant	1	5.079	0.948
Manipulative	2	2.211	1.206
Helpful	3	5.352	0.79
Conscientious	4	5.43	0.739
Opportunistic	5	3.211	1.445
Nurturing	6	4.602	1.007
Egocentric	7	1.852	1.123
Impulsive	8	2.258	1.021
Bold	9	3.977	1.27
Cautious	10	2.867	1.089
Self-controlled	11	4.766	1.076
Serious	12	3.461	1.122
Inflexible	13	1.273	0.801
Tense	14	1.203	0.58
Discreet	15	4.68	1.369
Curious	16	4.781	0.996
Confident	17	5.656	0.581
Open minded	18	5.602	0.644
Relaxed	19	4.977	0.877
Gullible	20	1.32	0.627
Frank	21	4.109	1.192
Domineering	22	1.711	0.932
Passive	23	1.547	0.912
Inhibited	24	1.367	0.651
Fanatical	25	1.477	0.823
Modest	26	3.008	1.151
Discriminating	27	3.173	1.516
Trusting	28	4.273	1.314
Nosy	29	1.914	1.21

Forceful	30	2.781	1.236
Witty	31	4.438	0.911
Sarcastic	32	1.313	0.612
Sincere	33	5.386	0.746
Aggressive	34	3.102	1.296
Polite	35	5.016	0.976
Likable	36	4.748	0.967
Sympathetic	37	4.134	1.057
Resentful	38	1.118	0.348
Ambitious	39	3.795	1.335
Trustworthy	40	5.441	0.813
Conservative	41	2.63	0.998
Creative	42	5.228	0.789
Conventional	43	2.77	0.985
Accepting	44	4.31	1.099
Distant	45	1.252	0.471
Charismatic	46	4.614	1.062
Logical	47	4.583	0.947
Condescending	48	1.181	0.569
Humorous	49	4.677	0.907
Orderly	50	4.488	0.999
Strong willed	51	3.031	1.291
Judging	52	1.976	1.023
Energetic	53	5.425	0.718
Outspoken	54	3.465	1.259
Optimistic	55	5.047	0.853
Dependable	56	5.591	0.638
Reflective	57	4.425	1.131
Spontaneous	58	4.26	1.093
Compulsive	59	1.992	0.988
Excitable	60	2.827	1.431
Agreeable	61	3.754	1.143
Comforting	62	4.0	1.047
Flattering	63	3.198	1.18
Anxious	64	1.622	0.835
Realistic	65	4.748	0.951

Thorough	66	5.331	0.702
Arrogant	67	1.134	0.385
Intimidating	68	1.125	0.452
Competitive	69	2.648	1.252
Discipline	70	4.609	0.998
Talkative	71	3.703	1.199
Suspicious	72	1.617	0.88
Respectful	73	5.273	0.92
Enthusiastic	74	5.609	0.564
Sociable	75	4.742	1.006
Yielding	76	2.906	1.09
Temperamental	77	1.398	0.863
Courageous	78	4.189	1.326
Rigid	79	1.532	0.731
Pessimistic	80	1.227	0.55
Understanding	81	5.008	0.779
Cheerful	82	4.898	0.877
Casual	83	3.727	1.055
Honest	84	5.5	0.732
Opinionated	85	2.297	1.206
Reliable	86	5.559	0.638
Persevering	87	4.789	0.977
Natural	88	4.781	1.072
Dissatisfied	89	1.488	0.958
Eloquent	90	3.859	1.332
Logical	91	4.57	0.945
Deliberate	92	3.672	1.028
Moody	93	1.227	0.536
Care free	94	2.359	1.141
Humble	95	3.273	1.418
Idealistic	96	3.452	1.309
Fair minded	97	5.133	0.797
Decisive	98	4.563	1.018
Generous	99	3.858	1.239
Grateful	100	3.441	1.451

APPENDIX E

LETTER MAILED WITH THE SECOND
SURVEY

OKLAHOMA STATE UNIVERSITY



Center for Aviation and Space Education
Oklahoma State University
Stillwater, Oklahoma 74078-8034
Office (405) 744-7015
Fax (405) 744-7785

October, 1998

Dear fellow SHRM member,

As the person responsible for the development of trainers in my company, I have come to realize that it takes more than good platform skills to be a good trainer. It takes a certain personality to be able to relate to the trainees to motivate them to be the best they can. I also realize that the responsibility of selecting the right person as a trainer is a key element in the success of the training process. I have been looking for a tool that would help me do better in this selection process.

That brings me to the purpose of this letter. I am a doctoral student at Oklahoma State University. I have chosen this issue as the subject for my dissertation. To that end, I would appreciate your input. The first step in the process is to rank those personality traits you feel would be important for a successful trainer to have. The additional questions will give some insight into the training activities within your organization. This information will be used to complete other objectives of my study.

I understand your time is very valuable so I have designed the enclosed survey in a way that you should be able to complete it in less than 15 minutes. Answering all questions will make this a more scientifically valid survey so I would appreciate your careful thought as you answer.

What's in it for you? Well, first of all, appreciation for contributing to the field of training and development. In addition, if you complete the survey and would like a summary of the results, please enclose your business card. I will be happy to send it to you. The results should help you and others in your company to be more effective at recruiting and developing trainers.

Even though there are no sensitive questions, let me assure you that confidentiality will be maintained. I will be the only person summarizing the information. No individual sources will be identified in the study.

Two requests: please answer all questions (it should take only a few minutes), and please respond within a few days so the results can get back to you in a timely manner. A self-addressed stamped envelope is included for your convenience. Your response is very important. If you have any questions or would like further information about this study, please contact Bob Layne at 9000 Allison Lane, Oklahoma City, OK 73151, (405) 947-2111.

Sincerely,

A handwritten signature in black ink, appearing to read 'Bob Layne'.

Bob Layne
Doctoral Student
Oklahoma State University

Sincerely,

A handwritten signature in black ink, appearing to read 'Kenneth E. Wiggins'.

Kenneth E. Wiggins
Professor and Head

APPENDIX F
QUESTIONNAIRE FOR THE
SECOND SURVEY

Your expert opinion is greatly appreciated. Please answer all the questions.

PERSONALITY TRAITS

Please rank each of the listed traits as you feel it relates to the **effectiveness** of a trainer. **Rank the most important trait as 1 and the least important as 10.** Please be sure to use each of the numbers (1 through 10) only once.

TRAIT	RANK
Dependable	
Trustworthy	
Enthusiastic	
Cautious	
Conscientious	

TRAIT	RANK
Open minded	
Confident	
Honest	
Nurturing	
Energetic	

TRAINING PERSONNEL

- Indicate the **number** of trainers hired or estimated to be hired from **outside** the company for each of the following years: 1996 _____, 1997 _____, 1998 _____, 1999 (est) _____, 2000 (est) _____
- Indicate the **number** of trainers developed or estimated to be developed from **internal** personnel for each of the following years: 1996 _____, 1997 _____, 1998 _____, 1999 (est) _____, 2000 (est) _____
- Considering **all** of the **current** trainers that were hired from **outside** the company, indicate the **number** from each of these sources:
 - directly from college with a bachelor's degree in human resources _____
 - directly from college with any other bachelor's degree _____
 - directly from college with any associate's degree _____
 - from the military _____
 - from the education field _____
 - from other companies, with prior experience as a trainer _____
 - from other companies, with no prior experience as a trainer _____
 - other sources _____
- Considering **all** of the **current** trainers that were developed from **within** the company, indicate the **number** who's job is (was): manager _____, supervisor _____, foreman _____, line worker _____, staff worker _____
- In your opinion how important is **subject matter expertise** in the **initial** hiring or selection of people to become a trainer? not important , of limited importance , moderately important , very important

PLEASE TURN THE PAGE AND COMPLETE SIDE TWO.

TRAINING OF TRAINERS

Identify any and all **structured** training your trainers usually receive **within their first year** as trainers.

1. **Internally provided** train-the-trainer training:

a. Total number of hours in the **first year**: 0 , 1 - 9 , 10 - 39 , 40 - 79 , over 80

b. Subjects covered in **structured** training during the **first year**: (check all that apply)

Instruction design <input type="checkbox"/>	Writing skills <input type="checkbox"/>	Problem solving <input type="checkbox"/>
Task & needs analysis <input type="checkbox"/>	Training theory <input type="checkbox"/>	Interpersonal skills <input type="checkbox"/>
Adult learning theory <input type="checkbox"/>	Facilitation skills <input type="checkbox"/>	Presentation skills <input type="checkbox"/>
Coaching skills <input type="checkbox"/>	Performance evaluation <input type="checkbox"/>	Cost benefit analysis <input type="checkbox"/>
Questioning skills <input type="checkbox"/>	Leadership skills <input type="checkbox"/>	Negotiation skills <input type="checkbox"/>

Other (s) _____

2. **Externally provided** train-the-trainer training:

a. Total number of hours in the **first year**: 0 , 1 - 9 , 10 - 39 , 40 - 79 , over 80

b. Subjects covered in **structured** training **during the first year**: (check all that apply)

Instruction design <input type="checkbox"/>	Writing skills <input type="checkbox"/>	Problem solving <input type="checkbox"/>
Task & needs analysis <input type="checkbox"/>	Training theory <input type="checkbox"/>	Interpersonal skills <input type="checkbox"/>
Adult learning theory <input type="checkbox"/>	Facilitation skills <input type="checkbox"/>	Presentation skills <input type="checkbox"/>
Coaching skills <input type="checkbox"/>	Performance evaluation <input type="checkbox"/>	Cost benefit analysis <input type="checkbox"/>
Questioning skills <input type="checkbox"/>	Leadership skills <input type="checkbox"/>	Negotiation skills <input type="checkbox"/>

Other (s) _____

c. Indicate the **sources** of **externally** provided training that you use: (check all that apply)

One-day seminars <input type="checkbox"/>	Multi - day seminars <input type="checkbox"/>	Community college <input type="checkbox"/>
Vo-tech schools <input type="checkbox"/>	Videotape or other media <input type="checkbox"/>	Video conferencing <input type="checkbox"/>

Other (s) _____

GENERAL INFORMATION

1. Are **you** involved with hiring trainers and/or selecting internal people to become trainers? Yes , No

2. Your title: Vice president , Director , Manager , other _____

3. Employees in **your** division/company: 1 - 99 , 100 - 499 , 500 - 999 , 1000 - 4999 , over 5000

4. **1998** training budget: \$1 - \$99K , \$100 - \$249K , \$250 - 499K , \$500 - \$999K , Over \$1M

5. The **number** of people whose job you would describe as "trainers." Their functions may involve planning, preparation, delivery, and/or evaluation of training programs within your company. _____

Do you want a summary of the results of this survey? Please include your business card.

APPENDIX G

IRB APPROVAL

OKLAHOMA STATE UNIVERSITY
INSTITUTIONAL REVIEW BOARD
HUMAN SUBJECTS REVIEW

Date: 06-23-98

IRB #:ED-98-134

Proposal Title: THE IDENTIFICATION OF DESIRED PERSONALITY TRAITS OF TRAINERS IN
THE CORPORATE ENVIRONMENT

Principal Investigator(s): H.C. McClure, W. Robert Layne

Reviewed and Processed as: Exempt

Approval Status Recommended by Reviewer(s): Approved

ALL APPROVALS MAY BE SUBJECT TO REVIEW BY FULL INSTITUTIONAL REVIEW BOARD AT
NEXT MEETING, AS WELL AS ARE SUBJECT TO MONITORING AT ANY TIME DURING THE
APPROVAL PERIOD.

APPROVAL STATUS PERIOD VALID FOR DATA COLLECTION FOR A ONE CALENDAR YEAR
PERIOD AFTER WHICH A CONTINUATION OR RENEWAL REQUEST IS REQUIRED TO BE
SUBMITTED FOR BOARD APPROVAL.

ANY MODIFICATIONS TO APPROVED PROJECT MUST ALSO BE SUBMITTED FOR APPROVAL.

Comments, Modifications/Conditions for Approval or Disapproval are as follows:

Signature: Thomas C. Collins
Interim Chair of Institutional Review Board
cc: W. Robert Layne

Date: July 1, 1998

VITA

W. Robert Layne

Candidate for the Degree of
Doctorate of Education

Thesis: THE IDENTIFICATION OF DESIRED PERSONALITY TRAITS OF
TRAINERS AS DETERMINED BY SELECTED MEMBERS OF THE
SOCIETY OF HUMAN RESOURCE MANAGEMENT.

Major Field: Applied Educational Studies

Biographical:

Education: Received a Bachelor of Science degree in Pharmacy from
Massachusetts College of Pharmacy, Boston, Massachusetts in May 1966.
Received a Master of Business Administration degree from New
Hampshire College, Manchester, New Hampshire in May 1984. Complete
the requirements for the Doctor of Education degree at Oklahoma State
University in May, 1999.

Experience: Employed as an adjunct professor in Marketing and Advertising for
the School of Business, University of Southern Maine. Currently a
licensee of Dale Carnegie training programs for the state of Oklahoma and
have conducted adult training programs for individuals and corporations.
Have hired, trained, and supervised trainers for thirteen years.

Professional Memberships: American Society for Training and Development,
Society of Human Resource Management