The Knowledge Exchange

CSTD

Conference 2005

| Saul Carliner | Dana Gaines Robinson | Donald Kirkpatrick | Stephen Lewis | Jack Phillips | Thiagi (Sivasailam Thiagarajan) | Brenda Sugrue | David Vance |

Josh Berson 2001

November 6-9, 2005

Nov. 6 – 7: Pre-Conference Workshops
Nov. 7: Opening Reception
Nov. 8 – 9: Conference & Trade Show
Metro Toronto Convention Centre
Toronto • Ontario • Canada

REGISTER TODAY and take advantage of our early bird rate.

MarketPlace 2005

Tuesday, November 8   9:45 am – 4:30 pm
Wednesday, November 9   7:15 am – 2:00 pm

Pre-Conference Workshops

November 6th

Jack Phillips & Patti Phillips
Two-day ROI Competency Building Workshop

November 7th

Jack Phillips & Lisa Edwards
Harvesting Corporate Profits:
A Strategic Accountability Approach to Employee Retention

Thiagi (Sivasailam Thiagarajan)
Interactive Strategies for Improving Performance

Saul Carliner, CTDP
Learning at the Royal Ontario Museum:
Lessons for the Design of Informal Learning Programs

Opening Reception
We roll out the official welcome mat.
You network with your peers.

Keynote Presentations

November 8th

Dana Gaines Robinson
Role of Strategic Business Partner:
Taking Performance Consulting to the Next Level

Stephen Lewis
President's Dinner Address

November 9th

David Livingstone, John Stevens, Brenda Sugrue and David Weiss
Plenary Panel on the State of Workplace Learning and Performance

David Vance
From Training to Learning at Caterpillar Corporate University

Donald Kirkpatrick
Evaluating Training Programs: The Four Levels

Need help in making your training plans a reality?

Visit our exhibitors! They offer a variety of products and services, including assessment tools, e-learning products, print and online resources, training courses, consulting services and more.

Exhibitors (as of July 31, 2005)

360 Solutions Canada Inc.
APT Methodologies
AME International
Bay3000 Corporate Education
Big Fish Interactive Inc.
Boom! The Power of Rhythm
Calliope Learning
Campus Canada
Canadian Management Centre
Career/Life Skills Resources Inc.
Carswell
CCI Learning Solutions Inc
CDI Education
Centre for Canadian Language
    Benchmarks
Chalk Media
Conduit Training and Conference
    Services
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Crisp Learning Canada
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Desire2Learn Inc.
Development Dimensions International
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Dolce International
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Franklin Covey Canada Ltd.
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General Physics Corporation
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Imperial Automation Technologies Inc.
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    Association
Industry Canada
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    Centre
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Workplace Training & Services Inc.

There are a limited number of sponsorships still available.
Contact Alistair Orr, National Sales Manager at aorr@cstd.ca today!

SCHEDULE AT-A-GLANCE

SUNDAY, NOVEMBER 6, 2005

W1. Two-day ROI Competency Building
JACK PHILLIPS and PATTI PHILLIP, ROI Institute Inc.
8:30 a.m. to 4:30 p.m. on both days

MONDAY, NOVEMBER 7, 2005

W2. Interactive Strategies for Improving Performance
SIVASAILAM "THIAGI" THIAGARAJAN
9:30 a.m. to 4:30 p.m.

W3. Learning at the Royal Ontario Museum
SAUL CARLINER, CTDP, Concordia University
1:00 to 4:30 p.m.

W4. Harvesting Corporate Profits
JACK PHILLIPS, ROI Institute Inc. and LISA EDWARDS,
Bloom Consulting
8:30 a.m. to 4:30 p.m.

OPENING RECEPTION
6:30 to 8:30 p.m.
We roll out the official welcome mat. You network with your peers.

TUESDAY, NOVEMBER 8, 2005

8:00 to 8:30 a.m.	REGISTRATION and COFFEE
8:30 to 8:45 a.m.	WELCOME and MORNING REMARKS
8:45 to 9:45 a.m.	**KEYNOTE ADDRESS**

DANA GAINES ROBINSON
Role of Strategic Business Partner: Taking Performance Consulting to the Next Level

9:45 a.m.	MarketPlace Opens
9:45 to 10:30 a.m.	Refreshment Break in the MarketPlace
10:30 a.m. to 12:00 p.m.	CONCURRENT SESSIONS A1 to A7

A1. Training & Development's Role in Guiding Constant Change
CHRIS EDGELOW, Sundance Consulting Inc.

A2. How to Run an Effective Learning Organization: IBM's Experience
KORINNE COLLINS, IBM

A3. Making Training and Evaluation Work
PATTI PHILLIPS, ROI Institute

A4. Informal Learning: What it is and Why Many Consider it the Next Frontier of Learning
SAUL CARLINER, CTDP, Concordia University

A5. Don't Forget Me! Designing & Delivering Inclusive Programs
HEATHER COLOQUHOUN, Kaleidoscopic Training

A6. Virtual Team Skills and Team Learning
DAVE WHITTINGTON, CTDP, Calliope Learning
TAMMY DEWAR, CTDP, Calliope Learning

A7. Individual Employee Performance Management in Union Environments: The Emperor goes to Abilene
MARK ALEXANDER, MAC B Group

12:00 to 1:00 p.m.	LUNCH in the MarketPlace
1:00 to 2:30 p.m.	CONCURRENT SESSIONS B1 to B7

B1. Doit-on réinventer la function formation?
CLAUDE MARTEL, EduConsillium

B2. Revitalizing Skills Training in Heavy Industry
RIC WILLIAMS, CTDP, Williams & Goffin Consulting Inc.

B3. Engaging Managers to Want Performance Solutions
DANA GAINES ROBINSON, Partners In Change, Inc.

B4. Surveying Fundamentals: A Practical Approach to Training and Development's Basic Evaluation Tool
VALERY KOZIOL, Perseus Canada Inc.

B5. e-Learning & Communities of Practice in Healthcare
HAROLD JARCHE, Mancomm Performance Inc.

B6. Single Source Instructional Design: Developing Content for the Classroom and the Web
ROY LAMOND, Cadmian Incorporated

B7. Crucial Conversations
CORY GARLOUGH, Scotiabank
STEVE WILLIS, VitalSmarts

2:30 to 3:00 p.m.	REFRESHMENT BREAK in the MarketPlace
3:00 to 4:30 p.m.	CONCURRENT SESSIONS C1 to C7

C1. Empowering Workplace Learning Using "Second Generation" e-Learning
JEAN ADAMS, Schulich School of Business, York University

C2. Proactive Leadership in Safety: Maximizing Safety Outcomes Through Performance Consulting
TONY ROITHMAYR, Performance! ...by design

C3. Using OD Measures and Interventions to Transform the Ugly Duckling
CHRISTINE STILLER, Christine Stiller and Associates

C4. ROI on a Shoestring – How to Measure More with Less
HOLLY BURKETT, Evaluation Works

C5. How to get an "A" When Moving to "E"
LORNE NOVOLKER, Docworks CPTI Inc.
LOUISE LEONE, Imperial Oil Limited

C6. Interactive Computer Games and Simulations as Effective Tools for Instructor Based Training
JUAN CARLOS SANCHEZ-LOZANO, Concordia University

C7. Clear Writing
Essential Skills
LEAH MORRIS, Adult Basic Education Association of Hamilton

4:30 p.m.	MarketPlace Closes
4:30 to 6:00 p.m.	COCKTAIL RECEPTION
6:00 to 9:00 p.m.	**PRESIDENT'S DINNER**

Dinner Address: Stephen Lewis
Honouring of CTDP Recipients and Canadian Awards for Training Excellence

WEDNESDAY, NOVEMBER 9, 2005

7:30 to 8:30 a.m.	SUNRISE SESSION

Find out more about the CSTD's certification program!

7:15 to 8:30 a.m.	REGISTRATION and COFFEE
7:15 a.m.	MarketPlace Opens
8:30 to 10:00 a.m.	**OPENING PLENARY PANEL**

State of the Industry: Workplace Learning and Performance
DAVID LIVINGSTON, University of Toronto
JOHN STEVENS, Wales Management Council
BRENDA SUGRUE, American Society for Training and Development
Moderated by: DAVID WEISS, Knightsbridge GSW

10:00 to 10:30 a.m.	REFRESHMENT BREAK in the MarketPlace
10:30 a.m. to 12:00 p.m.	CONCURRENT SESSIONS D1 to D6

D1. State of Workplace Education in Canada
DAVID LIVINGSTON, University of Toronto

D2. Simulation and Large Scale change: Aligning Hearts and Minds with Strategic Intent
DON JONES, exper!ence it inc.

D3. Leapfrog Leadership: Secrets to Drive Strategic Performance
JILL BIRCH, Sheridan Institute of Advanced Technology and Advanced Learning

D4. ROI Network Panel
DAVID VANCE, Caterpillar University + TBA
Moderated by: LYNETTE GILLS, Learning Designs Online Inc.

D5. Software Simulation Theory: The Infinite Cage
DAVID WILKINS, Knowledge Planet

D6. It Takes Two to Tango: Bringing Out the Best in Your SME Presenters in an Online Environment
CHRISTY CONTE, KPMG Canada

D7. Is there a Need to Reinvent the Training Function?
CLAUDE MARTEL, Educonsillium

12:00 to 1:30 p.m.	LUNCH

Luncheon Address: DAVID VANCE
From Training to Learning at Caterpillar Corporate University

1:30 to 2:00 p.m.	REFRESHMENT BREAK in the MarketPlace
2:00 p.m.	MarketPlace Closes
2:00 to 3:30 p.m.	CONCURRENT SESSIONS E1 to E7

E1. High Performance Work Practices
JOHN STEVENS, Wales Management Council

E2. Leadership Lessons Learned: A Case Study Review of the Learning Organization
MAUREEN EWING, Langara College
FAYE WHITE, Faye White Consulting

E3. Strategically Aligning T&D with Senior Management
MELISSA Baddeley, Coast Capital Savings
CHRISTINE LAWLOR, Coast Capital Savings

E4. Cost Benefit Analysis and Return on Investment in the Evaluation of the Defence Learning Network
Major LAURENT VAILLANCOURT, CTDP, National Defence
RALPH KELLETT, Ralph Kellett & Associates

E5. e-Learning at the Top of the World
ROBERT GERST, Converge Consulting Group Inc.
LEAH VON HAGEN, Diavik Diamond Mines Inc.

E6. How to Create an Effective "Learning System Architecture"
ROBERT PEARSON, Provinent Corporation

E7. Apprentissage et communautique en services de santé
HAROLD JARCHE, Mancomm Performance Inc.

3:45 to 5:00 p.m.	**CLOSING KEYNOTE**

DONALD KIRKPATRICK
Evaluating Training Programs: The Four Levels

Pre-Conference Workshops: November 6-7

Note: Pre-conference workshops will be held at the InterContinental Toronto Centre (unless otherwise specified) which is adjacent to the Metro Toronto Convention Centre, 225 Front Street West, Toronto, Ontario

SUNDAY, NOVEMBER 6, 2005

W1. Two-day ROI Competency Building Workshop
JACK PHILLIPS and PATTI PHILLIP, ROI Institute Inc.
8:30 a.m. to 4:30 p.m. on both days

This two-day workshop emphasizes the ROI Process developed by industry leader Jack Phillips. Participants will experience application of the ROI Process model which includes developing application impact objectives, collecting various types of hard and soft data, isolating the effects of the program, converting data to monetary values, tabulating appropriate program costs, and calculating the ROI. Participants quickly see the advantage of the process as six types of data are collected and analyzed. This data represents both qualitative and quantitative data, developed from a variety of sources.

This is a two-day workshop that will take place on November 6th and 7th.

MONDAY, NOVEMBER 7, 2005

W2. Interactive Strategies for Improving Performance
SIVASAILAM "THIAGI" THIAGARAJAN
9:30 a.m. to 4:30 p.m.

The best way to improve your training is to encourage participants to interact with each other, with the content, and with you. In this workshop, Thiagi will reveal five secrets of effective interactive training that is faster, cheaper, and better. With Thiagi's framegame approach, you will learn how to load existing templates to create your own games in a matter of minutes. You will also learn how to avoid irrelevant fluff and fun and immerse your participants in engaging activities.

MONDAY, NOVEMBER 7, 2005

W3. Learning at the Royal Ontario Museum
SAUL CARLINER, CTDP, Concordia University
1:00 to 4:30 p.m.
Lessons from the Design of Museum Exhibits for the Design of Informal Learning Programs

How the techniques and technologies we use to design formal training programs in the workplace have been adapted to promote informal learning about science and technology among general audiences in a museum? Participate in a special tour of the Royal Ontario Museum, one of Toronto's best art and history museums. Explore the museum with a questionnaire provided and, in a debriefing afterwards, consider the techniques used by the museum to engage participants, and consider ways to apply those techniques to the design of online and classroom learning programs (to be held at the Royal Ontario Museum).

W4. Harvesting Corporate Profits
JACK PHILLIPS, ROI Institute Inc. and LISA EDWARDS, Bloom Consulting
A Strategic Accountability Approach to Employee Retention

Learning and development professionals will be accountable for implementing strategies that help their company attract and retain the best employees. To be effective in their role, they will need to be equipped with a strategic accountability approach to the employee retention challenge to assure ROI. In this workshop, participants will learn: why employee retention should be a key business strategy, a strategic accountability approach to employee retention and to create a strategic plan of action to reduce turnover for their organization.

2005 CSTD Knowledge Exchange Program

TUESDAY, NOVEMBER 8, 2005

8:00 to 8:30 a.m.	**REGISTRATION and COFFEE**
8:30 to 8:45 a.m.	**WELCOME and MORNING REMARKS**
8:45 to 9:45 a.m.	**KEYNOTE ADDRESS**

L'interprétation simultanée sera disponible pour cette séance.

DANA GAINES ROBINSON
Role of Strategic Business Partner:
Taking Performance Consulting to the Next Level

With increasing frequency, those who work in Learning and Performance functions are transitioning into the role of a strategic business partner (SBP). In this role, SBPs draw upon their Human Performance Technology (HPT) knowledge and performance consulting skill sets to define and align people strategies with an organization's business goals. Those in this role are truly sitting "at the table" with leaders, influencing the decisions made relative to the organization's strategic direction.

What are the three accountabilities for Strategic Business Partners? What are some of the optimal practices used to transition to and operate as an SBP? And how is the role of a Strategic Business Partner similar to, and different from, the role of a Performance Consultant? These are some of the questions to be addressed in this presentation.

9:45 a.m.	**MarketPlace Opens**
9:45 to 10:30 a.m.	**REFRESHMENT BREAK in the MarketPlace**

10:30 a.m. to 12:00 p.m. CONCURRENT SESSIONS A1 to A7

A1. ■ Training & Development's Role in Guiding Constant Change
Theme: Leadership & Change
CHRIS EDGELOW, Sundance Consulting Inc.

In this hands-on practical session, training and development professionals will gain an understanding of their role in making complex change easy and how they can add value in a changing organization. Deepen your understanding of T&D's critical role during constant change, and discover how to help integrate strategy, change, transition and communication throughout a changing organization. Participants will explore how to facilitate an organization through complex change.

A2. ▲ How to Run an Effective Learning Organization: IBM's Experience
Theme: Strategic Planning & Organizational Effectiveness
KORINNE COLLINS, IBM

Case Study

How can you ensure the learning organization is providing value? This session will discuss how IBM's CLO and Learning Organization ensure alignment with IBM's overall strategies by using IBM's transformation of learning as an example. You will hear about models you can use in your own organization and:
• How to measure the effectiveness of the learning organization
• How to create a learning strategy that is aligned with the organization's business objectives
• How to drive value from learning at the individual, team and organizational levels

A3. ▲ Making Training and Evaluation Work
Theme: Measurement & Performance
PATTI PHILLIPS, ROI Institute Inc.

Explore how to create, implement, and sustain a comprehensive measurement and evaluation system from a program's planning stages through its conclusion. This session does not emphasize any particular model or approach to evaluation. Rather, the focus is on the key issues of making the process itself work. Professionals who are involved in measuring and evaluating training will come away from this session with practical information and guidance for improving and enhancing the measurement and evaluation process.

A4. ▲ Informal Learning: What it is and Why Many Consider it the Next Frontier of Learning
Theme: e-Learning
SAUL CARLINER, CTDP, Concordia University

Why is informal learning a useful approach to online curricula? Informal learning helps designers realize the anytime, anywhere aspect of e-learning by encouraging them to break free from the traditional tutorial and provide learners with just the content they are will need at a given time. By showing examples of informal learning campaigns, this session provides participants with design principles and strategies for preparing learning initiatives that rely on informal learning to bring about performance improvement.

A5. ■ Don't Forget Me! Designing & Delivering Inclusive Programs
Theme: Tools & Techniques
HEATHER COLQUHOUN, Kaleidoscopic Training

Are we reaching our whole audience? With diverse workforces come diverse learning needs. Expand beyond the concept of learning styles and examine your design and delivery from an inclusivity perspective. Concepts and tools in several areas of diversity will be examined with a goal of building more inclusive learning experiences. This session will appeal to any professionals seeking to maximize the learning for all participants in their training programs.

A6. ■ Virtual Team Skills and Team Learning
Theme: Essential Skills
DAVE WHITTINGTON, CTDP, Calliope Learning
TAMMY DEWAR, CTDP, Calliope Learning

Teamwork is changing. Teams must now operate in a virtual world, at least for some of the time. They are often also inter-generational, horizontal and/or self-directed. The opportunities for miscommunication, misunderstanding and the occasional conflict are many and varied. This session will outline a framework of essential competencies for modern teamwork as well as some tools to enhance team performance. Participants will learn:
• A framework for organizing virtual teamwork competencies
• Ideas for how to use the framework to enhance team performance
• Some simple tools to improve team communication and understanding

Legend	■ Intermediate	▲ Advanced

TUESDAY, NOVEMBER 8, 2005

A7. 🔺 **Individual Employee Performance Management in Union Environments: The Emperor goes to Abilene**
Theme: Strategic Planning & Organizational Effectiveness
MARK ALEXANDER, MAC B Group

Why have organizations and unions failed to deal with Individual Employee Performance Management (IEPM)? Why is it in their mutual interest to address this issue? This session will examine in detail the current situation regarding IEPM in union environments. The new skills required to implement IEPM will be discussed, along with possible collectivist strategies and high performance work systems. A proven strategy for making it happen in one large Canadian company will be shared.

12:00 to 1:00 p.m.   LUNCH in the MarketPlace

1:00 to 2:30 p.m.   CONCURRENT SESSIONS B1 to B7

B1. 🔺 **Doit-on réinventer la fonction formation?**
Thème: recherche
CLAUDE MARTEL, EduConsillium

Avec toutes les pressions afin d'adapter la main-d'oeuvre aux nouvelles réalités du marché, avec la mise à la retraite des «babyboomers», les cadres supérieurs se questionnent de plus en plus sur l'efficacité et l'intégration de la fonction formation dans leurs organisations. Cette session interactive passera en revue les mythes que les cadres supérieurs et les professionnels soutiennent. Nous regarderons aussi certaines approches offrant des alternatives aux modèles classiques de formation en entreprise. Dans cette session, nous discuterons :
- Du gouffre qui existe entre le discours des cadres supérieurs et celui des professionnels de la formation
- Les positions et les mythes souvent diffusés par les cadres supérieurs au sujet de la formation
- Les positions et les mythes souvent diffusés par les professionnels de la formation
- Comment la formation peut devenir une fonction stratégique au sein d'une entreprise

B2. 🔺 **Revitalizing Skills Training in Heavy Industry**
Theme: Leadership & Change
RIC WILLIAMS, CTDP, Williams & Goffin Consulting Inc.

Learn how the impact of training on business drivers has created a shift in corporate culture from training as a cost to a necessary investment with a beneficial ROI. Some business drivers include: Safety, Organizational Effectiveness, Business Transformation and Business Literacy. This session will examine an actual work in progress where training is being aligned with the strategic direction of a major operating division.

B3. 🔺 **Engaging Managers to Want Performance Solutions**
Theme: Strategic Planning & Organizational Effectiveness
DANA GAINES ROBINSON, Partners In Change, Inc.

One of the most frequently expressed concerns of performance consultants is, "How do I get managers to want to support performance improvement initiatives and not just seek a training program?" The key is to ask the right questions, helping managers to view the need more systemically. But what are these right questions and how do Performance Consultants ask them when reframing a request (the reactive approach)? In this workshop you will develop skills to engage your managers in discussions about business and performance results – and not just the solution that has been requested. You will receive an interview guide designed to use when conducting this type of conversation.

B4. ◼ **Surveying Fundamentals: A Practical Approach to Training and Development's Basic Evaluation Tool**
Theme: Measurement & Evaluation
VALERY KOZIOL, Perseus Canada Inc.

T&D is surveying-intensive — from needs assessments, to "smile sheets" at a session's end, to ROI and instructor performance evaluations. However, the value and relevance of data collected is directly related to the construction and flow of questions asked. Flawed data can lead to flawed business decisions and flawed learning programs. Find out how to design effective, non-biased, and respondent-friendly questionnaires that will help your T&D efforts.

B5. ◼ **e-Learning & Communities of Practice in Healthcare**
Theme: e-Learning
HAROLD JARCHE, Mancomm Performance Inc.

This case study will address the implementation of online learning for nurses as they adopted new nursing methodology, as well as the creation of virtual communities of practice for social workers and mental health professionals. From the initial performance analyses conducted on the hospital wards, to the implementation of the open source Moodle and Mambo technology systems, the consultants worked closely with the hospital staff in the co-development of their knowledge base and knowledge-sharing tools.

B6. 🔺 **Single Source Instructional Design: Developing Content for the Classroom and the Web**
Theme: Tools & Techniques
ROY LAMOND, Cadmian Incorporated

Single Source Development Strategies can save organizations time and money. Roy will present Cadmian's experience with organizations such as Sun Microsystems and Adobe Systems in single source development of content for multiple delivery modalities — Classroom, Web, PDF, etc. He will focus on instructional design and development considerations as well as discuss the types of technologies that assist in achieving a single source strategy.

B7. ◼ **Crucial Conversations**
Theme: Essential Skills
CORY GARLOUGH, Scotiabank
STEVE WILLIS, VitalSmarts

Coaching, communicating strategy, influencing colleagues, dealing with an irate customer, or delivering a performance appraisal all require mastery of communication skills. Scotiabank realized through their performance analysis, that the cost of poorly handled crucial conversations was too high. They implemented a blended learning program from VitalSmarts called 'Crucial Conversations' to ensure their Branch Managers were equipped to handle crucial conversations with both customers and employees. By reviewing the design process between Scotiabank and VitalSmarts, session participants will understand the process of identifying communication skills as a performance need and take away a blended learning model for behavioural training.

2:30 to 3:00 p.m.   REFRESHMENT BREAK in the MarketPlace

3:00 to 4:30 p.m.   CONCURRENT SESSIONS C1 to C7

C1. ◼ **Empowering Workplace Learning Using "Second Generation" E-learning**
Theme: Research
JEAN ADAMS, Schulich School of Business, York University

Early results of online learning have been disappointing. In contrast to first generation e-learning, where the underlying design is based on the classroom model, second generation e-learning aims to put the learner in control of learning by enabling self-organizing learning. Gain insight into a highly flexible, self-organizing approach to both design and implementation by examining action-learning research. This session will illustrate the concept of "second generation" e-learning using a research-based e-learning system and introduce a "tight-loose" blended learning framework using two case studies.

C2. 🔺 **Proactive Leadership in Safety: Maximizing Safety Outcomes Through Performance Consulting**
Theme: Leadership & Change
TONY ROITHMAYR, Performance! ...by design

In Canada, three workers die from an occupational injury or disease every working day and one injury occurs every ten seconds worked. The consequences to individuals, families and corporations are severe. This session describes a performance consulting model and methodology that helps leaders improve safety in a variety of settings. Actual project results will be presented and discussed to demonstrate how Leading Indicators measure the effectiveness of safety leadership, maximize the performance system that enables Great Safety Performance, and provide evidence of safety due diligence. Participants will have an opportunity to assess Leading Indicators in their own organizations.

C3. 🔺 **Using OD Measures and Interventions to Transform the Ugly Duckling: A Case Study**
Theme: Strategic Planning & Organizational Effectiveness
CHRISTINE STILLER, Christine Stiller & Associates

Hear the strategic framework and organizational development interventions behind this story of a successful team transformation. A Toronto-based hospital's Food Services department transformed their operation from being under-performers to being leaders in teamwork and quality service. Staff satisfaction survey data was used to create this multi-pronged approach that involved hospital leadership and team members in building greater trust as well as aligning processes with outcome measures in order to create focused accountability and improved customer satisfaction.

C4. 🔺 **ROI on a Shoestring: How to Measure More with Less**
Theme: Measurement & Evaluation
HOLLY BURKETT, Evaluation Works

Despite heightened interest in return-on-investment and increased accountability for practitioners to prove their bottom-line value, many are deterred from ROI because of concerns associated with the resources and costs of implementing the process. Through real-world case studies, a proven evaluation model, and practical job-aids, this interactive session will provide cost saving approaches for developing a credible, economical ROI strategy within a resource-constrained environment.

C5. ◼ **How to get an "A" When Moving to "E"**
Theme: e-Learning
LORNE NOVOLKER, DocworksCPTI Inc.
LOUISE LEONE, Imperial Oil Limited

This session will discuss the challenges and lessons learned through designing and developing the first global e-learning initiative for Exxon Mobil Fuels Marketing division. Find out why Exxon Mobil selected this content and audience for their first global e-learning initiative, how diversity, culture, and language were dealt with, and some of the challenges encountered and lessons learned.

Legend	◼ Intermediate	🔺 Advanced

C6. ■ **Interactive Computer Games and Simulations as Effective Tools for Instructor Based Training**
Theme: Tools & Techniques
JUAN CARLOS SANCHEZ-LOZANO, Concordia University

Training practitioners often use games and simulations because they are engaging and fun. However, few are aware of the key concepts that are necessary for successfully designing, developing or evaluating a game/simulation. Additionally, many managers and clients see games and simulations as trivial and doubt their effectiveness. This session explores these issues and focuses on computer games for instructor-based training. Participants will play a game/simulation and will analyze it in light of the concepts presented.

C7. ■ **Clear Writing**
Theme: Essential Skills
LEAH MORRIS, Adult Basic Education Association of Hamilton

In this workshop, you will learn how to present your written information in a clear and concise way. You will learn design, format, presentation, language and basic clear writing tips. You will be able to apply these tips to all written materials including memos, newsletters, minutes, reports, manuals, correspondence, flyers, pamphlets, etc. This workshop is for anyone involved in writing for an audience.

4:30 p.m.	MarketPlace Closes
4:30 to 6:00 p.m.	COCKTAIL RECEPTION
6:00 to 9:00 p.m.	PRESIDENT'S DINNER

Dinner Address: STEPHEN LEWIS
Canadian Awards for Training Excellence
Honouring of CTDP recipients

WEDNESDAY, NOVEMBER 9, 2005

7:30 to 8:30 a.m.	SUNRISE SESSION

Find out more about the CSTD's certification program!

7:15 to 8:30 a.m.	REGISTRATION and COFFEE
7:15 a.m.	MarketPlace Opens

8:30 to 10:00 a.m.   OPENING PLENARY PANEL
L'interprétation simultanée sera disponible pour cette séance.

State of the Industry: Workplace Learning and Performance
DAVID LIVINGSTONE, Canada Research Chair in Lifelong Learning and Work, University of Toronto
JOHN STEVENS, Wales Management Council
BRENDA SUGRUE, American Society for Training and Development
Moderated by: DAVID WEISS, Knightsbridge GSW

What are the current trends and issues in the workplace learning and performance industry? What do we mean by workplace learning and performance and what impact does it have? How does Canada measure up when compared with other jurisdictions? Where are we headed as an industry? How significant is the integration of people and learning to the business strategy? Hear our international panel of three industry experts discuss these issues.

10:00 to 10:30 a.m.   REFRESHMENT BREAK in the MarketPlace

10:30 a.m. to 12:00 p.m.   CONCURRENT SESSIONS D1 to D7

D1. ▲ **State of Workplace Education in Canada**
Theme: Research
DAVID LIVINGSTONE, Canada Research Chair in Lifelong Learning and Work, University of Toronto

Findings of the 2004 national survey of learning and work will be presented in this session. Profiles of formal education attainments, job-related and general adult education course participation, informal training activities and non-taught informal learning will be summarized for the entire labour force and different occupational groups.

These knowledge profiles will be analyzed in relation to entry credentials expected and actual performance requirements in the current job structure. Because significant mismatches are often found, leadership strategies for narrowing the gaps will be discussed, in terms of both new training processes and job redesign.

D2. ▲ **Simulation and Large Scale Change: Aligning Hearts and Minds with Strategic Intent**
Theme: Leadership & Change
DON JONES, exper!ence it inc.

Learn how experiential learning works in large scale change initiatives. During this session the audience will participate in a discussion of the critical need to engage a workforce—both intellectually and emotionally—in order to align it with organizational strategy. Participants will hear two Canadian success stories of large scale organizational change and the innovative learning methodologies that drove measurable results.

D3. ▲ **Leapfrog Leadership: Secrets to Drive Strategic Performance**
Theme: Strategic Planning & Organizational Effectiveness
JILL BIRCH, Sheridan Institute of Advanced Technology and Advanced Learning

Find out what's changed in building leadership capacity and how you can strengthen your abilities to execute effectively. You'll learn about the power of reflection and critical thinking skills as well as explore key leverage points to enhance your leadership. An experiential session will round out your ability to better understand the type of leader you have the potential to become as you grow yourself and your team into the future. By attending this session you will:
• Learn what has changed in leadership and how leaders are adapting to these changes
• Explore 10 major leverage points in leadership to enhance your influence and performance
• Arm yourself with new ways to think on your feet
• Learn how to design your own personalized leadership model

D4. ■ **ROI Network Panel**
Theme: **Measurement & Evaluation**
DAVID VANCE, Caterpillar University + TBA
Moderated by LYNETTE GILLIS, Learning Designs Online Inc.

An interactive panel discussion of Return on Investment Methodologies, corporate case studies will be examined. Additional panel members to be announced.

D5. ▲ **Software Simulation Theory: The Infinite Cage**
Theme: e-Learning
DAVID WILKINS, Knowledge Planet

Understand the theory behind software simulation. Learn about the five principles of good software simulation design: scenario-based exercises, scaffolding (when to use different types of simulation), immersion (how to make a learner feel like they're in a real experience), fidelity (how to make their actions authentic), and feedback (what to do when the learner is right or wrong).

D6. ■ **It Takes Two to Tango: Bringing Out the Best in Your SME Presenters in an Online Environment**
Theme: Tools & Techniques
CHRISTY CONTE, KPMG Canada

At KPMG, learning involves highly technical, specialized content that must be delivered by in-house domain experts. Two KPMG Audit partners will partner in this session and share their challenges and successes in bringing out the best in SME facilitators. Participants will learn to:
• Identify challenges in partnering with subject matter expert presenters
• Identify presentation skills required by SME presenters
• Appreciate the differences between online and face-to-face facilitation
• Understand the consequences of poor partnering with SMEs
• Bring out the best in SME presenters

D7. ▲ **Is there a Need to Reinvent the Training Function?**
Theme: Strategic Planning & Organizational Effectiveness
CLAUDE MARTEL, Educonsillium

With the pressure to perform, and changes in the workforce caused by the retirement of baby boomers, senior managers have become more vocal and wonder if there are better ways to train in their organization. This interactive session proposes to review the mythologies on both the corporate and the training sides, and review alternate approaches where the training function can be adapted to effectively complement the business process of the organization. This session will address:
• The gaps that may exist between the executive and the training discourses in an organization
• Some positions and mythologies about training held by upper management
• Some of the mythologies held by training professionals
• How to become more strategic by focusing on the key business processes of an organization

Legend	■ Intermediate	▲ Advanced

12:00 to 1:30 p.m.   LUNCH

Luncheon Address: DAVID VANCE
L'interprétation simultanée sera disponible pour cette séance.
The Caterpillar University Journey to Make Learning a Strategic Asset

Caterpillar University was formed in 2001 to transform learning at Caterpillar and ensure that the company's investment in learning was as effective and efficient as possible. David Vance, formerly Caterpillar's Chief Economist and the first President of Cat U, will share his team's journey — the challenges, the accomplishments and the lessons learned.

He will discuss the structure of corporate universities, suggesting a middle ground between centralization and decentralization of the learning function. He will share a process to ensure that learning is aligned to organizational goals, resulting in an Enterprise Learning Plan. David also will talk about their governance process, and about their extensive metrics and evaluation procedures to ensure learning is run like a business to deliver results. In particular, he will discuss some of their work on ROI for learning and compare it to ROI for other business decisions. And, he will share some thoughts about what comes next in the journey to become a high-powered, results-driven continually learning organization.

1:30 to 2:00 p.m.   REFRESHMENT BREAK in the MarketPlace

2:00 p.m.   MarketPlace Closes

2:00 to 3:30 p.m.   CONCURRENT SESSIONS E1 to E7

E1. ▲ High Performance Work Practices
Theme: Research
JOHN STEVENS, Wales Management Council
High performance work practices (HPWP) promote high levels of adaptability, flexibility and involvement and enable people at all levels within organizations to participate in the development of processes, products and services.

This session will define HPWP more closely. It will ask: Are we all high performance workers now? Do all organizations need to use HPWP? Who needs to take the lead in developing HPWP? Where does learning fit into the HPWP formula? Where do personnel and development practitioners fit into HPW organizations?

Research carried out in Wales, the UK and internationally will be used to explore these issues. Case studies will be used to illustrate the links between HPWP and organizational effectiveness. They will look at the role of leaders and champions, team performance, devolved decision-making, and people management and development strategies in private and public sector organizations.

E2. ■ Leadership Lessons Learned: A Case Study Review of the Learning Organization
Theme: Leadership & Change
MAUREEN EWING, Langara College
FAYE WHITE, Faye White Consulting
Curious about the relationship between the learning organization and leadership change interventions? This presentation of two case studies in Health and Education will provide examples of how an assessment of a learning organization can inform change and innovation. Participants will:
- Review the concept of the Learning Organization
- Explore how the concept of the Learning Organization can be used to inform organizational change
- Discuss the assessment of the Learning Organization and its application
- Discover linkages between the Learning Organization and leadership
- Identify opportunities within their organizations for leadership change interventions

E3. ▲ Strategically Aligning T&D with Senior Management
Theme: Strategic Planning & Organizational Effectiveness
MELISSA BADDELEY, Coast Capital Savings
CHRISTINE LAWLOR, Coast Capital Savings

In this interactive session, participants will examine strategies for aligning corporate learning with the strategic plans of their organization, and gaining the support and voice needed at the executive level. Participants will walk away with the framework for developing their own strategic plan to align their T&D initiatives with their organization's corporate agenda. Attendees will learn to:
- Examine the reasons why T&D does not garner the respect it deserves within organizations
- Develop strategies to overcome obstacles that prevent the alignment of T&D with corporate initiatives
- Create a framework for bringing their T&D function into strategic alignment with their organization
- Networking strategies to build solid alliances with your senior management

E4. ■ Cost Benefit Analysis and Return on Investment in the Evaluation of the Defence Learning Network
Theme: Measurement & Evaluations
Major LAURENT VAILLANCOURT, CTDP, National Defence
RALPH KELLETT, Ralph Kellett & Associates

Return-on-Investment or ROI is used to decide the continuation or termination of training programs. The Department of National Defence (DND) used cost-benefit/ROI as a part of its evaluation of the Defence Learning Network (DLN), which is a Distributed Learning/e-learning delivery network. The value of cost-benefit/ROI analysis in training evaluation and business case development will be discussed. The way DND obtained the data needed for cost-benefit/ROI analysis from case studies will also be explored.

E5. ▲ e-Learning at the Top of the World
Theme: e-Learning
ROBERT GERST, Converge Consulting Group Inc.
LEAH VON HAGEN, Diavik Diamond Mines, Inc.

East Island, Lac de Gras, is home to Diavik's $1.4 billion dollar facility and one of the most advanced e-learning systems in the world — delivering safety, environmental and related training to all Diavik's employees. This session will cover the design, development and deployment of the Diavik Training System (DTS). The presentation will review the challenges posed in developing an e-learning safety training system in one of the most dangerous and demanding places on earth, and how high levels of cultural, linguistic and skill diversity were accommodated.

E6. ■ How to Create an Effective Learning System Architecture
Theme: Tools & Techniques
ROBERT PEARSON, Provivent Corporation

In any organization, a successful learning program begins with a well-conceived and well-articulated plan. An effective plan or learning system architecture (LSA) ensures learning needs of an organization are aligned with corporate strategy, needs, and budget. Within the context of an actual case study, participants will learn and apply a proven methodology to create a learning system architecture – a document that describes the goals, staging, scope and high level costing of a learning program. In this session you will learn:
- The definition of learning system architecture (LSA)
- The importance of LSAs as a tool for organizational change
- When it is appropriate to use an LSA and the major steps in preparing one
- The most effective ways of documenting an LSA

E7. ■ Apprentissage et communautique en services de santé
Thème: apprentissage électronique
HAROLD JARCHE, Mancomm Performance Inc.

Depuis 2003, l'équipe Mancomm Performance a collaboré, avec le Centre de santé et services sociaux (CSSS) du Sud-Lanaudière à la mise en place d'un cours en ligne pour les infirmières portant sur l'approche McGill, ainsi qu'à la création de communautés de praticiens pour les travailleurs sociaux et les professionnels en santé mentale. Depuis l'analyse de la performance au travail jusqu'à la livraison sur des plateformes MOODLE et MAMBO (logiciels gratuits et libres), l'équipe a travaillé étroitement avec le personnel hospitalier au moyen d'ontologies de domaine et la co-construction d'une base de connaissances.
- Apprendre comment faire une analyse de performance avant de recommander l'apprentissage en ligne
- Comprendre l'importance des ontologies dans la création des bases de connaissances
- Comprendre les bénéfices des logiciels libres pour le support à la performance
- Comprendre les méthodologies utilisée par l'équipe

3:45 to 5:00 p.m.   CLOSING KEYNOTE

L'interprétation simultanée sera disponible pour cette séance.
DONALD KIRKPATRICK
Evaluating Training Programs: The Four Levels

Join Donald Kirkpatrick as he shares his insights on:
- The ten requirements for an effective training program
- The three reasons for evaluating
- An overview of the "Four Levels"
- Guidelines and suggested implementation of each
- Information on "Level 5"

This will be a PIE session. Come and find out what this means. You won't be disappointed!

Donald Kirkpatrick is Past President of ASTD, received the 2004 ASTD "Lifetime Achievement in Workplace Learning and Performance", and is a member of Training Magazine's "HRD Hall of Fame". Donald has his B.B.A, M.B.A, and Ph.D. from the University Of Wisconsin, and is a former Training Director, Personnel Manager and Professor at the Management Institute, University of Wisconsin. He is the author of seven management books including the volume that is used all over the world — "Evaluating Training Programs: The Four Levels".

| Legend | ■ Intermediate | ▲ Advanced |

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