
Towards a redefinition of strategic HRD

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Abstract

Reviews the literature on strategic human resource development (SHRD) and explores the concept specifically in the context of the work of Garavan (1991), which highlighted nine key characteristics of SHRD. Garavan's seminal paper is used as a starting point from which to examine the development of the concept of SHRD. By examining and reviewing the literature, the nine characteristics are redefined and enhanced, thus moving towards a new model and definition of SHRD. Concludes by defining SHRD as the creation of a learning culture, within which a range of training, development and learning strategies both respond to corporate strategy and also help to shape and influence it. It is the reciprocal, mutually enhancing, nature of the relationship between HRD and corporate strategy which lies at the heart of SHRD and at the heart of the development of a learning culture.

Introduction

Many commentators on organisational matters advocate that the endemic and complex challenges for the global economy which emerged in the latter part of the twentieth century will continue unabated into the new millennium (Dicken, 1992; Peters, 1987; Handy, 1989). These challenges have been characterised by the globalisation of economic activity, the fragmentation of markets, paradigm shifts in production relations and massive leaps in technological infrastructure (Freeman *et al.*, 1993; Sanderson, 1998; Hamel and Sampler, 1998). In order to deal with such global shifts, organisational theorists and practitioners agree that organisations must understand the vital role which learning and development will play in ensuring their survival (Salamon and Butler, 1990). Therefore, organisations must realise that there is a need for serious investment in human resource development (HRD) and training, as the Department for Education and Employment point out, "Investment in human capital will be the foundation of success in the twenty-first century" (DfEE, 1998). The fundamental element of this will be the requirement of organisations to ensure that any investment which is made in human capital with the promotion of HRD strategy is clearly linked to the wider corporate strategy.

The concept of Strategic HRD (SHRD) has been much explored in the training and development literature of the last decade (Higgs, 1989; Keep, 1989; Noel and Dennehy, 1991; Garavan, 1991; Holden and Livian, 1993; Siggers, 1994; Sloman, 1994; Rainbird, 1995; Garavan *et al.*, 1995; Torraco and Swanson, 1995; Lee, 1996b; Stewart and McGoldrick, 1996; Harrison, 1997; O'Donnell and Garavan, 1997; Garavan *et al.*, 1998), but there has been

relatively little work on what characterises an organisation with a strategic approach to HRD. This article reviews the literature on SHRD and explores the concept specifically in the context of the work of Garavan (1991) which highlighted nine key characteristics of SHRD (see Figure 1). Garavan's (1991) paper was used as a foundation and cornerstone from which to examine the ways in which the concept of SHRD had changed in the years since 1991. By examining and reviewing the literature, these nine characteristics are redefined and enhanced, thus moving towards a new model and definition of SHRD.

Defining SHRD

It is essential in beginning this analysis, to define the term SHRD, and first to underline the point that:

the field of human resource development defies definition and boundaries. It's difficult to put into a box (Blake, 1995, p. 22).

Garavan *et al.* (1995) also contends that the term HRD is used in many different contexts and that it concerns a range of widely differing activities, leading to considerable confusion about its use. Despite these difficulties, however, a number of useful definitions of SHRD exist, including the following:

The strategic management of training, development and of management/professional education interventions, so as to achieve the objectives of the organisation while at the same time ensuring the full utilisation of the knowledge in detail and skills of individual employees. It is concerned with the management of employee learning for the long term keeping in mind the explicit corporate and business strategies (Garavan, 1991, p. 17).

Strategic HRD can be viewed as a proactive, system-wide intervention, linked to strategic

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planning and cultural change. This contrasts with the traditional view of training and development as consisting of reactive, piecemeal interventions in response to specific problems (Beer and Spector, 1989, p. 25).

These definitions, among others (Harrison, 1997; Stewart and McGoldrick, 1996), stress the need for SHRD to operate within, be linked to and keep in mind, corporate strategy. This would suggest that HRD should be responsive to corporate strategy. However, it is important to ask whether SHRD can occupy more than the rather reactive role implied by this suggestion and this article challenges the perception that SHRD only ever flows *from* corporate strategy. HRD, it is suggested (O'Donnell and Garavan, 1997; Harrison, 1997; Torraco and Swanson, 1995), should become more strategically focused, but what, specifically, does being more strategically focused actually mean? In order to examine this question, the following section will explore the nine SHRD characteristics suggested by Garavan (1991) (Figure 1). Each will be re-examined and redefined in order to work towards a new model of SHRD.

The characteristics of SHRD

Integration with organisational missions and goals

Garavan (1991) stresses the point that the need for integration into business planning is critical for SHRD, as is a contribution to corporate goals and an awareness of the mission of the organisation. Garavan *et al.* (1998), also stress that HRD is viewed as a strategic lever in organisations because it is seen as a means of helping the organisation to implement its business strategies. This work points towards “vertical integration”, as described by those such as Guest (1987) and Storey (1992). Clearly, this “fit” or

integration is vital, but it echoes the matching model of HRM (Devanna *et al.*, 1984) in suggesting a responsive and reactive role for SHRD. Alternatively, a more proactive role may actually be at the real heart of SHRD, moving away from a strategy supporting and implementing role, towards a role where SHRD helps to shape and influence, corporate strategy. Torraco and Swanson (1995), for example, suggest that where an emergent strategy is dominant (for instance in organisations where there are frequent technical innovations), then HRD can have a strategy shaping, rather than simply supporting, role. They also suggest, more generally, that:

Today's business environment requires that HRD not only support the business strategies of organisations, but that it assume a pivotal role in the shaping of business strategy (Torraco and Swanson, 1995, p. 11).

Mintzberg (1978) and Mintzberg and Waters (1985) put forward a similar model, exploring HRM both as an implementation tool in relation to corporate strategy, where strategy is deliberate, and as a formation, as opposed to formulation, tool, where it is emergent (formulation is assumed to imply a formal and deliberate planning process). This model could apply equally to an examination of the potential dual functions of HRD in relation to corporate strategy. HRD could therefore, at least in theory, also play a role in either implementing and/or forming corporate strategy.

Lee (1996a), using a model of training maturity originally proposed by Burgoyne (1986) in relation to management development, also suggests that in strategically mature organisations SHRD resides in a proactive role at the top of the scale shown in Figure 2.

In this work, the concept of training maturity is used to describe the level of sophistication which the organisation has with regard to training and the extent to which training helps to shape and formulate (or form) corporate strategy. Integration with organisational missions and goals, as suggested by Garavan (1991), therefore suggests an implementation role for HRD, but truly strategic HRD should also shape and influence these missions and goals (Legnick-Hall and Legnick-Hall, 1988; Butler, 1988).

Top management support

It is suggested that the support and active participation of top management, as key stakeholders, is vital for the development of SHRD (Garavan, 1991). Lee (1996b) goes further in suggesting that this support needs to be from the point of view of their

Figure 1
Key SHRD characteristics

1. Integration with organisational missions and goals
2. Top management support
3. Environmental scanning
4. HRD plans and policies
5. Line manager commitment and involvement
6. Existence of complementary HRM activities
7. Expanded trainer role
8. Recognition of culture
9. Emphasis on evaluation

Source: Garavan (1991)

Figure 2

Scale of training maturity

1. Training and learning are processes through which strategy is formulated
2. Training and learning possibilities help to shape strategy
3. Training is the means for implementing corporate strategy and achieving change
4. Training integrated with operational management
5. Isolated tactical training
6. No systematic training

Source: Lee (1996a)

operational roles *and* their own personal development. It must therefore be in the form of active, rather than simply passive, support and involvement. Harrison (1997) also suggests that HRD should be led, rather than simply supported, by top management. Torraco and Swanson (1995) and Noel and Dennehy (1991) propose that to earn such support, HRD professionals must demonstrate their strategic capability, crucially by helping strategic planners to acquire the conceptual, analytical and interpersonal skills they require to do their jobs properly. This point is also made by Garavan *et al.* (1998), where it is suggested that HRD is often perceived as a means of helping managers to adopt strategic thinking. The role of such managers as “key actors” in HRD (Garavan *et al.*, 1998) suggests that their active leadership of HRD (rather than their passive compliance) is critical. As a key SHRD characteristic, top management *support* should therefore become top management *leadership*.

Environmental scanning

Continuous knowledge of the external environment, in terms of opportunities and threats for the business and for HRD specifically, is vital for SHRD to flourish (Garavan, 1991; Higgs, 1989). However, it is crucial that other senior managers, and not just HRD professionals (Torraco and Swanson, 1995; Sloman, 1993), should be gathering such information. Who conducts the SWOT or PEST analysis and whether it is done specifically in HRD terms is critical. Truly strategic HRD operates where senior management automatically consider the HRD implications of any changes in the internal or external environment, rather than seeing this as the job of the HRD specialists (Rainbird, 1995; Peery and Salem, 1993). In this way, HRD can become properly integrated into the organisation and into the strategic planning process. It is not enough for environmental scanning simply to take

place, although this is clearly critical; it must be done specifically in HRD terms and by senior management.

HRD policies and plans

Garavan (1991) also states that, for HRD to be strategic in focus, it must formulate plans and policies which flow from, and are integrated with, business plans and policies. Although it is acknowledged that HRD plans can influence, rather than simply react to business plans (Hendry and Pettigrew, 1986), this appears to be a crucial and under-developed point. The implication is still of an operational rather than a strategic emphasis. Plans and policies are clearly necessary, but it is also vital that there are HRD strategies, developed by the top management team.

Strategy has been defined as:

the route that has been chosen for a period of time and from a range of options in order to achieve business goals. It is a guide to action and therefore sets the scene within which policies – including those employee resource (ER) policies relating to the learning and development of people – can be agreed and implemented (Harrison, 1997, p. 19).

It is therefore about the present and future direction of the organisation, from a broad perspective, whereas policy can be seen as the specific routes to be followed and the tasks to be undertaken in order to achieve the strategy. Training plans represent the next level down and usually consist of the details of priority training interventions from the point of view of who, how, when and where. For SHRD to thrive, therefore, HRD policies and plans need to be supplemented by HRD strategies.

Line management commitment and involvement

The enthusiastic involvement of the line manager (Zenger, 1985) is considered to be critical for SHRD, since line managers are key stakeholders and “actors” in HRD (Garavan, 1991; Garavan *et al.*, 1998). Garavan

(1991) points out that the role of HRD needs to be clarified and that HRD staff also need to be clear about the kind of support they expect and desire from other stakeholders or “actors”. Rainbird (1995, p. 83) regards the trend towards devolvement of HRD responsibilities to the line as:

A key indicator of the ability to integrate human resource and business strategies.

Paradoxically though, such devolvement often involves only operational issues, leaving HRD specialists to concentrate on more strategic issues, so that divergence and fragmentation, rather than integration, takes place. What is vital is that line managers and HRD specialists work in partnership on both operational and strategic issues.

Lee (1996b) and Harrison (1997) also stress the need for shared ownership of HRD, where line managers and HRD staff work in partnership over HRD issues. Wognum (1998) refers to this as “strategic HRD aligning” – the process of integrating stakeholder interests in HRD. However, in reality, it is likely that the role of line managers in HRD is underdeveloped for a variety of complex attitudinal and cultural reasons (Harrison, 1992; Garavan, 1987; Leicester, 1989; Sinclair and Collins, 1992). It may even be the case that training specialists exclude line managers because of concerns over the threat of substitution (Grace and Straub, 1991). Such strategic partnerships may therefore not exist in reality. For example, Garavan *et al.* (1998) found that many of the “actors” in HRD either claimed exclusive ownership of HRD strategy or felt that it rested with someone other than themselves. Despite these difficulties, it seems clear that line management support and involvement are not alone sufficient for SHRD to flourish. Also vital are collaborative and strategic partnerships between HRD specialists and line managers. Line managers should drive as well as deliver HR policies (Storey, 1995), and what is crucial for the development of SHRD is that they do this in partnership with HR professionals.

Existence of complementary HRM activities

Garavan (1991) argues that HRD must view itself as part of a wider package of HRM strategies and that HRD is central to HRM as “a vital if not the pivotal component” (Garavan *et al.*, 1995, p. 5). Such horizontal and internal integration or “fit” (Guest, 1987; Storey, 1992; Baird and Meshoulam, 1988) is clearly important for the development of SHRD, although others (Storey, 1994; Harrison, 1997) question whether in reality such integration exists. Certainly, merely

complementary (as opposed to fully integrated) HRM activities may not in themselves be sufficient for the development of SHRD. What are needed are strategic partnerships between HRM and HRD professionals of the kind implied by O'Donnell and Garavan (1997), where an alliance between HRD strategy and a global-arching HRM strategy is suggested. Without such real alliance and integration between HRM and HRD, to the extent that they are seen as one and the same, there is probably little hope of either having much impact on the achievement of corporate objectives.

Expanded trainer role

Garavan (1991) suggests that a strategic HRD function requires trainers who can be innovators and consultants, rather than simply providers or managers of training (see also Sloman, 1993; Pettigrew *et al.*, 1982; Harrison, 1997). However, Philips and Shaw (1989) develop this further and suggest that the consultancy role could involve training, learning, or organisational change issues. They contend that it is only really in the latter role that the concentration is on meeting the strategic needs of the organisation; the former roles tend to concentrate on meeting the needs of the individual. Talbot (1993) also suggests that the roles of the trainer could include:

- adaptive (adapting the skills and knowledge of staff to fit existing systems);
- adoptive (getting staff to adopt new values or attitudes); or
- innovative (informing and influencing organisational change processes).

It is in this latter role and in the organisational change consultant role (Philips and Shaw, 1989) that HRD specialists can flourish and make a strategic contribution. HRD staff also need to be leaders, as well as facilitators, of change, despite the possibility of underlying doubts about their own credibility (O'Donnell and Garavan, 1997). They need to be proactive rather than simply reactive and to see themselves in a central and strategic, rather than peripheral and operational, role (Garavan *et al.*, 1998). Garavan's (1991) view that HRD specialists need to develop and expand their role could therefore be extended to place an emphasis on strategic change roles in particular. Equally critical, perhaps, is the need for a common understanding across the organisation about the role of HRD staff. Bennett and Leduchowicz (1983), in their model of trainer effectiveness, stress the need of such congruence between the trainer's own perception of their role and the

expectations and perceptions of the rest of the organisation.

Recognition of culture

It is clear that the HRD function must be aware of corporate culture and take into account the need for a match between culture and strategy in the organisation (Garavan, 1991). Culture is seen as an important variable in deciding how HRD should be delivered and evaluated. An under-developed issue would appear to be the role of HRD in influencing and changing, rather than simply maintaining, corporate culture. In the words of Burack (1991, p. 88):

Human resource development (HRD) has a crucial, challenging role to play in successfully “orchestrating” strategic culture change.

Culture is a complex concept and notoriously difficult to pin down or clarify. The influence which SHRD might have in changing corporate culture could therefore be even more difficult to isolate and clarify. However, this is an issue which has been addressed in some of the literature on the learning organisation (Garratt, 1987; Senge, 1990; West, 1994; Pedler *et al.*, 1991, among others). Learning, it is suggested, can be both a product of culture as well as a means of transmitting and changing culture, although the interrelationships are complex and poorly understood. Certainly, the existence of a learning culture would seem crucial to the existence of SHRD and likewise any organisation where HRD has a role in influencing culture probably already has a learning culture in place. For SHRD to flourish, therefore, a recognition of culture, as pinpointed by Garavan (1991), may not be enough. Complex though the issues and interrelationships clearly are, it is proposed that a recognition of the potential for HRD to develop and enhance (as opposed to merely recognise) corporate culture is essential.

Emphasis on evaluation

Garavan (1991) stresses that in order to be strategic, the HRD function must evaluate its activities, but this point would appear to need further development. Jackson (1989), Philips (1991), Torraco and Swanson (1995) and Harrison (1997) all argue strongly that training should be results-oriented and that evaluation should take place at what Hamblin (1974) calls the ultimate level, (addressing whether business needs have been met). This inevitably involves some degree of cost-effectiveness evaluation, difficult though it can be to carry out. It may be that the lack of such investment calculations simply helps to perpetuate a

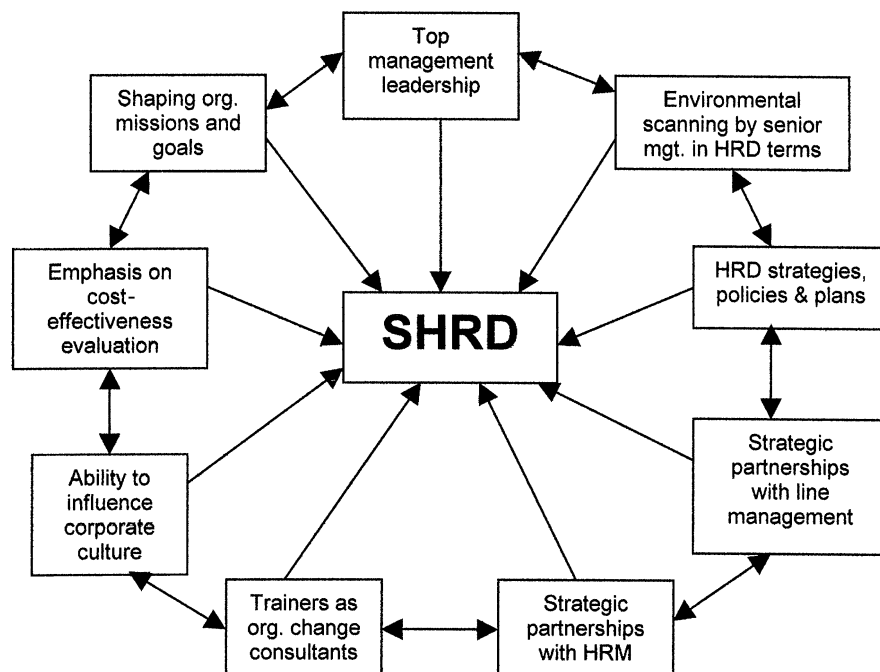
culture in which training is seen as a luxury rather than a serious investment in the long-term future of the organisation. The importance of cost-effectiveness evaluation in the development of SHRD should therefore be stressed. Paradoxically, however, this emphasis on pay-back calculations can lead to a concentration on achieving quantifiable results within a short timeframe and it is vital not to undermine the importance of HRD as an investment with long-term and less tangible benefits (such as culture change). This is one of the many paradoxes of an examination of the role of HRD and it is addressed in the work of Lee (1996a), in what he calls the pay-forward view of training. Nevertheless, the importance of cost-effectiveness evaluation should not be underestimated (Harrison, 1997).

Towards a new model of SHRD

Having examined the nine characteristics in a highly compartmentalised manner, it is vital to stress that in reality the issues are not so easily separated out. They are intricately interlinked and should complement and mutually support one another (Baird and Meshoulam, 1988). For SHRD to emerge, therefore, it is essential, not only that these characteristics exist, but that they are well integrated and that there is “internal fit”. All are important in their own right, but they are also interrelated. If one or more is absent or weak, then this could significantly undermine the development of SHRD, because the links with other characteristics would also be weakened. For example, top management leadership without strategic partnerships with line management would mean that HRD was not properly embedded into the organisation and this would represent a significant barrier to the development of a learning culture. The organisation would almost certainly be less strategically mature in HRD terms than one where both senior and line management commitment to HRD were strong. The same could be argued for almost any combination of the characteristics. They have thus been represented in Figure 3 as an open system, with each reliant on the others, so that SHRD emerges and thrives.

As SHRD emerges and thrives (as it must for the organisation to survive in these traumatic times), then so does a learning culture. The concept of the learning organisation (LO) (Argyris and Schön, 1978; 1996; Levitt and March, 1988; Garratt, 1987; De Geus, 1988; Moingeon and Edmondson, 1996) is relevant to consider in the context of

Figure 3
SHRD as an open system



SHRD, which recognises constant organisational and environmental change, and the need for an identifiable organisational learning culture (Schein, 1985) to emerge.

As a consequence of the challenges and changes related to contracting out, empowerment and de-layering, managers will be operating in organisations which are constantly evolving, so they will have to be more flexible and undertake “continuous learning rather than periodic training” (Institute of Management, 1994, p. 37). If we consider for a moment a definition of the LO given by Pedler *et al.* (1991, p. 1) – “an organisation which facilitates the learning of all its members and continually transforms itself” – we can see how relevant this concept of constant development for organisations is.

The facilitation of such learning and development can only take place in a supportive environment where there is a clear link between HRD and corporate strategy, where HRD is embedded into the life-blood of the organisation, and where senior, line and HR staff work in partnership to support learning initiatives. All of these aspects have clearly been communicated as integral to the emergence of the LO, where learning becomes “institutional” and as De Geus (1988, p. 70) proposes:

whereby management teams change their shared mental models of their company, their markets and their competitors.

Without such integration between HRD strategy and corporate strategy, and the emergence of such “institutional learning”, SHRD will fail to flourish.

We can conclude by summarising the differences between Garavan’s (1991) description of the characteristics of SHRD and those developed above. As a result of our review of the literature, each description of the nine characteristics has been expanded and enhanced and the differences are shown in Table I.

The new enhanced version of the nine characteristics suggests that SHRD is about more than “keeping in mind” business strategies (Garavan, 1991, p. 17). SHRD should have a much more proactive and influential role. This leads to a proposal for a new model for SHRD, which is detailed in Figure 4. This distinguishes between the following:

- Training, which has a reactive and *ad hoc* implementation role in relation to corporate strategy. Training specialists tend to have an administrative and delivery role, providing standardised services to the organisation (Brewster and Soderstrom, 1994). There is little evidence of the existence of any of the nine Garavan (1991) characteristics, even in their original (rather than enhanced) version. The organisation is strategically immature in HRD terms and has no discernible learning culture.

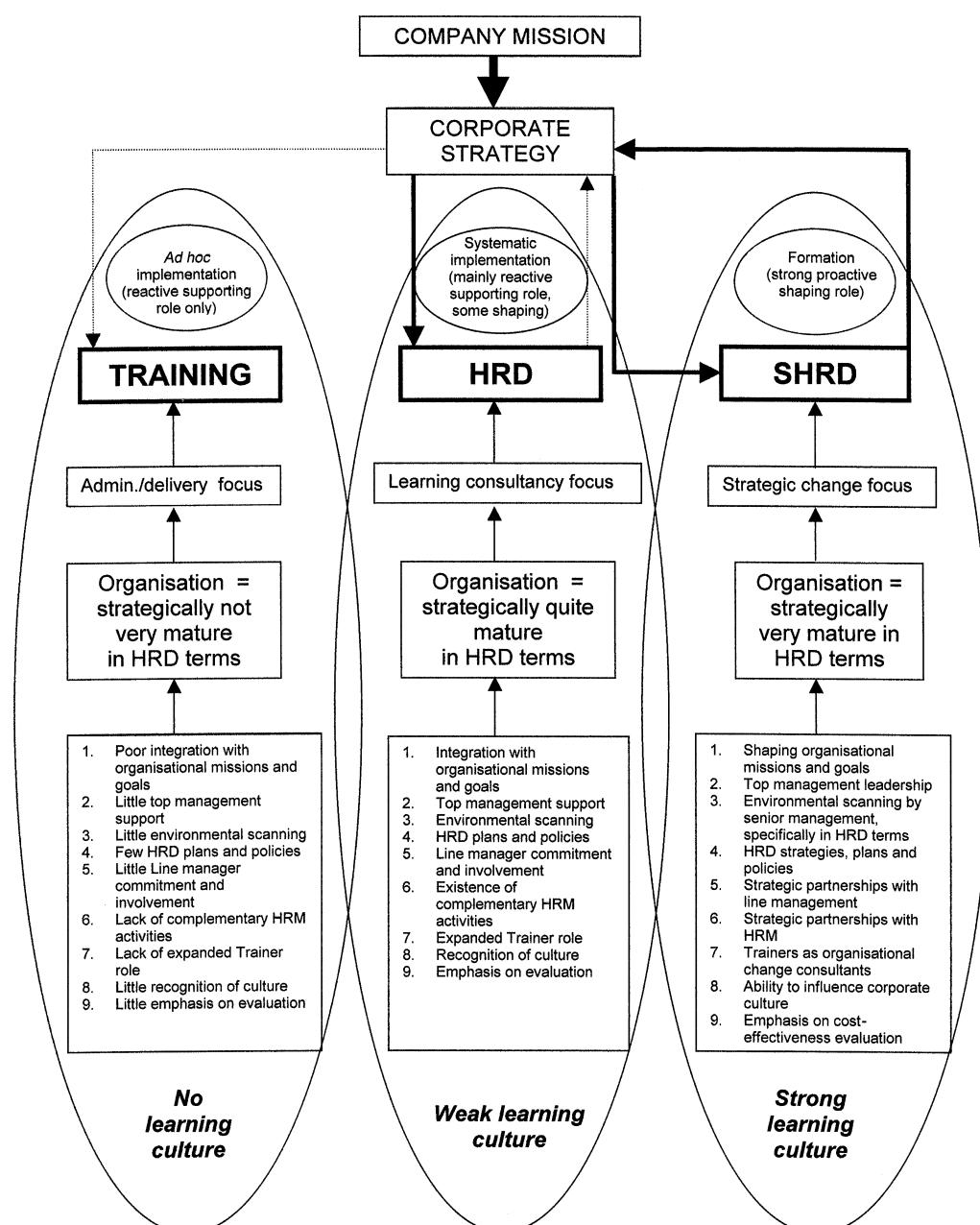
Table I

A comparison of SHRD characteristics

SHRD characteristics (Garavan, 1991)	SHRD characteristics (Wallace and McCracken, 1999)
1. Integration with organisational missions and goals	Shaping organisational missions and goals
2. Top management support	Top management leadership
3. Environmental scanning	Environmental scanning by senior management, specifically in HRD terms
4. HRD plans and policies	HRD strategies, policies and plans
5. Line manager commitment and involvement	Strategic partnerships with line management
6. Existence of complementary HRM activities	Strategic partnerships with HRM
7. Expanded trainer role	Trainers as organisational change consultants
8. Recognition of culture	Ability to influence corporate culture
9. Emphasis on evaluation	Emphasis on cost-effectiveness evaluation

Figure 4

A model of SHRD



- HRD, which has a systematic implementation role, but shows some signs of beginning to shape corporate strategy. HRD specialists have developed an internal learning consultancy role (Philips and Shaw, 1989), providing non-standardised services to line managers (Brewster and Soderstrom, 1994). The organisation is beginning to develop a maturity in HRD terms, with each of the nine Garavan (1991) characteristics in evidence and a learning culture starting to develop.
- SHRD, where the role is proactive in both shaping and responding to corporate strategy. SHRD specialists have developed a strategic and innovative role as organisational change consultants (Philips and Shaw, 1989) leading, as well as facilitating, change. The organisation has become strategically mature in HRD terms and evidence of all nine of the enhanced Garavan (1991) characteristics, as well as a strong learning culture, is in place.
- It is vital to stress that the roles described here are not necessarily mutually exclusive. They have been compartmentalised for ease of analysis, but in reality probably represent more of a continuum. In particular, the various roles of training and HRD specialists (Brewster and Soderstrom, 1994) may well coexist at any one time in one organisation.

The characteristics of SHRD suggested by Garavan (1991) have thus been refined and redefined, leading to a new conceptual model of SHRD. SHRD could thus be defined as the creation of a learning culture, within which a range of training, development and learning strategies both respond to corporate strategy and also help to shape and influence it. It is about meeting the organisation's existing needs, but it is also about helping the organisation to change and develop, to thrive and grow. It is the reciprocal, mutually enhancing, nature of the relationship between HRD and corporate strategy (Legnick-Hall and Legnick-Hall, 1988; Butler, 1988) which lies at the heart of SHRD and at the heart of the development of a learning culture.

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