

## The AHRD Globalization Pre-conference: Anachronism or Hiatus? Interpretive Case Study

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*This paper describes the development of globalization as a theme for the pre-conferences that precede the annual AHRD conference. It presents a qualitative case study of what it was like for students from the University of Minnesota to participate in the first globalization pre-conference and examines issues related to the discontinuance of the globalization pre-conference after five years.*

Key Words: Globalization, AHRD Pre-conference, International HRD

An Atlanta airport hotel was the site of the 1997 Academy of Human Resource Development (AHRD) conference. After a discussion about the internationalization of the profession, Lex Dilworth from Virginia Commonwealth University and Verna Willis from Georgia State University engaged in a debriefing session in the hotel bar.

“I remember that it was a strawberry daiquiri,” Willis recalled (personal interview, Hawaii, February 27, 2002). As their discussion touched on the topic from earlier in the day, Michael Marquardt from George Washington University and Gary McLean from the University of Minnesota happened by. According to Dilworth, McLean had said during an earlier discussion about a globalization activity “you don’t do it unless I am involved. I want to be on board with this”(2002).

Willis and others had “conversations for a long time about the lack of international perspective” in the profession. She remembered a survey regarding international perspectives in the ASTD/HRD network in 1990. “Only two [university] programs had international courses,” she recalled.

By 1997, Dilworth had been put in charge of the pre-conference program by Richard Swanson, President of the Academy. Willis, Marquardt, and Dilworth had been involved in the action learning pre-conference. Marquardt (2002) speculated that

Verna and Lex felt they had done a few action learning [sessions] and they didn’t see anything new emerging, or something that would be attractive to them and thought, let’s work on this globalization, which we all three happened to be interested in as well, as obviously Gary is also. We thought, let’s add that as a new pre-conference.

The four professors believed that a globalization pre-conference could influence the academy, “its thinking and its efforts,” as well as attracting non-US people to the conference and to the academy. “We thought it could . . . diversify membership,” Marquardt added.

Lex described the meeting that took place: “It was [only] about 30 minutes, but it was one of those things where it just implodes. It just fires up and you’re instantly there . . . Mike said, why don’t we create a hypothetical company, build a scenario around it . . . then we went ahead and did it.”

Marquardt and Berger (2003) five years later discussed internationalization and HRD: “Globalization has influenced every aspect of the HRD profession, yet HRD professionals have played a relatively insignificant role thus far in affecting globalization” (283). According to McLean and Bates, “the HRD profession must include not only economic development and workplace learning, but it must also be committed to the political, social, environmental, cultural, and spiritual development of people around the world” (Marquardt and Berger, 2003).

In 2003, however, the Academy dropped globalization as a pre-conference activity.

### The Research Problem

The AHRD globalization pre-conference presented a forum for participants to examine one of the most rapidly changing areas of the profession—the globalization that has increasingly become a relentless force in international affairs as well as heightening the conflicts between developed and developing nations. The need for an AHRD role in this arena can be summarized by McLean and McLean (2003), as “professional organizations are becoming increasingly globally networked and so, too, are practice and academia.” This study explores two research questions, using case study methodology to examine the first globalization pre-conference from the point of view of the student participants, and to investigate the expectations of selected leaders in HRD practice and academia:

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- What was it like being involved in the globalization simulation project at the first pre-conference?
- Did the globalization pre-conferences meet the expectations of the founders, justifying their continuance?

### **The First AHRD Globalization Pre-conference**

Working with people of different backgrounds, we'd run into the same pitfalls we were trying to teach people about . . . sometimes it was frustrating, because of the different backgrounds – we were expecting different things out of the meetings—U of M Student Participant in Globalization Project

The 1998 AHRD conference in Chicago featured the globalization pre-conference, Simulations in Multicultural HRD, to present cross-cultural HRD issues through student-developed training sessions. Teams from George Washington University (GWU), Georgia State University (GSU), Virginia Commonwealth University (VCU), and the University of Minnesota (U of M) individually developed simulation activities under a common theme, represented by the fictional US American Worldwide, Incorporated's training needs scattered around the globe. Common plenary sessions were sandwiched around two concurrent simulations, allowing pre-conference attendees to select two of the four available sets of activities developed by individual institutions.

Eleven University of Minnesota (U of M) students from his fall, 1997 International Organization Development (IOD) class joined Professor McLean in the project with the U of M delegation to undertake two assignments: to develop Worldwide, Inc, as the overarching strategy for the four institutions in the pre-conference; and, for its own concurrent session, to prepare a simulation of a multi-cultural OD Needs Assessment.

This section reports how students involved in the U of M project viewed their participation in the development and implementation of their part of the AHRD globalization pre-conference. As a participant-observer in this project, I hope that the reflections presented in this case study will answer the question What Was It Like Being Involved in the Globalization Simulation Project, and will contribute to a greater understanding of the context of HRD training where both trainers and participants generate a multicultural training context.

#### *Pre-conference Simulation Components*

The four components making up the Globalization Pre-conference included: Needs Assessment and Organizational Development (U of M), Curriculum Design (GSU), Learning Program Delivery (GWU), and Evaluation Across Cultures (VCU). Each simulation was delivered by a university student team under the leadership of senior faculty. Each team selected two non-US countries to present cross-cultural issues within the framework of Worldwide, Inc. The U of M group chose Puerto Rico and the Peoples Republic of China for its simulation.

Pre-conference Organizer, Professor Dilworth from VCU, saw the pre-conference as a unique event insofar as it included teams having international students who would bring a cross-cultural awareness to the simulation exercises.

#### *The U of M Student Organization*

The first goal at Minnesota was to create a student-led organization to research and prepare its simulation for the pre-conference. The second goal was to conduct the simulation as one of the four global pre-conference choices.

Students in the IOD class represented a diverse global population, and those from the US generally had previous cross-cultural experience. The international student simulation planners came from China, South Africa, Sri Lanka, and Thailand. Of the US participants who remained on the project, there were two African-Americans and four White Americans. By gender there were seven females and three males; participants included four undergraduates and three each in masters and doctoral programs. Seven out of the ten were interviewed in a qualitative evaluation.

#### *Learning Objectives*

The student group deliberated about learning objectives for the U of M simulation and decided upon three objectives for participants; after the simulation they would be able to

- recognize the importance and complexity of moving to a global perspective for HRD;
- increase awareness of the need for cross-cultural sensitivity and competence within an increasingly global workforce; and
- gain a deeper understanding of our own culture and how that culture influences behavior.

#### *Group Tasks*

The Minnesota students split into work groups and completed the following ten tasks:

1. developed an overall scenario (Worldwide, Inc.) for all pre-conference planning groups.
2. researched three cultures to provide material for the cross-cultural training exercises.
3. identified the “global” objectives and concepts related to organization development, needs assessment, and “globalization” for pre-simulation training activities; and for the simulation, itself.
4. developed both pre-test / post-test materials to help pre-conference participants self-assess their sensitivity to and understanding of cross-cultural training issues.

5. identified materials for the U of M portion of the pre-conference binder / notebook.
6. designed and developed the simulation, itself.
7. determined how to debrief participants and create a reporting-out procedure.
8. created training activities for the simulation.
9. structured “buzz” sessions to practice our roles.
10. coordinated with the other university groups during McLean’s absence.

Five of the eleven students created the simulation exercise, while the remaining students paired up to work on the other tasks. Students worked on three or four tasks, first completing those listed earlier. The entire group met on Sunday afternoons, the last few sessions devoted to testing the pre-simulation and simulation activities, including revising the pre and post-tests, rewriting portions of the cross-cultural material, and editing conference materials.

*Simulation Game Design*

Since the US American Worldwide, Inc., provided the master scenario, the U of M group first developed a defining set of US American values along with common US American business practices that was then shared with the other University teams. Similar sets of values and practices were then created for both Puerto Rican and Chinese cultures.

The first set of activities introduced Worldwide, Inc., basic concepts of organization development, and methods of needs assessment. After the introduction, presimulation cultural and role-specific learning activities were undertaken to prepare participants for the simulation itself. Figure 1 summarizes the flow of activity 1.

<b>Flow of Activity 1</b>	
<b>Introduction and Rules</b>	(5 minutes) Provide the company overview, briefly explain the activity.
<b>Organization Development Overview</b>	(10 minutes) Introduce definition and concept of OD, and competencies of OD practitioners.
<b>Needs Assessment Overview</b>	(5 minutes) Introduce methods of Needs Assessment, and list advantages/disadvantages of each method
----- <b>Beginning of Simulation</b> -----	
<b>Cultural Learning</b>	(15 minutes) Divide participants into culture-specific groups and distribute cultural behavior sheets (if possible, place non-USA citizens in the U.S. group). Ask group-members (x3) to read the behavior sheets and to discuss their roles and norms among themselves. Emphasize the importance of adapting and remaining true to “their” assumed culture throughout the simulation. Illustrate typical interactions within each culture, e.g., greetings, distance rules, physical interaction norms, etc.
<b>Role-specific Learning</b>	(35 minutes) Ask for nine volunteers to serve as the OD Needs Assessment team (three people from each culture). Separate the OD Needs Assessment team members from the cultural groups.  <b>For OD NA Group:</b> Explain roles and responsibilities, and explain that the team must determine the Needs Assessment technique and instrument to be used in the simulation. <i>The decision must be unanimous and reflect the cultures represented.</i>  Divide the nine participants into three OD Teams with a representative from each culture in a team.  <b>For Cultural Groups:</b> Distribute and explain job descriptions and cultural issue/sub-scenario. Each member will assume one of the following roles: Program Manager, HR/Personnel Manager, Customer Service Manager, Assembly Technician, or a regular employee (x3). Explain how the culture determines their interaction in these roles, and the OD issue that has arisen due to this interaction.
----- <b>Break (15 Minutes)</b> -----	

Figure 1 - Flow of Simulation Activity 1

The simulation is represented in Figure 2, Flow of Activity 2. The needs assessments were conducted in three sessions, observed by participants from non-presenting groups. A later review prepared training recommendations for presentation to Worldwide Inc.

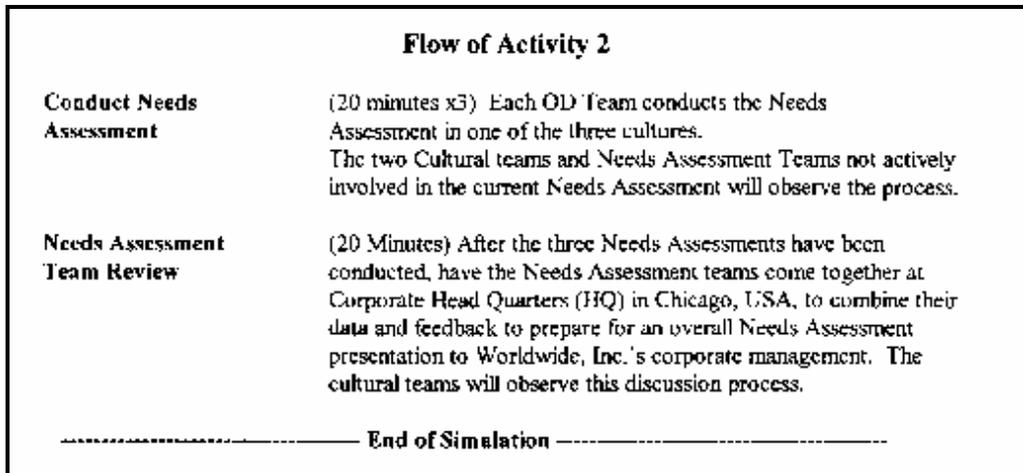


Figure 2 - Flow of Simulation Activity 2

Figure 3 charts the relationship of activity 1 and activity 2 elements.

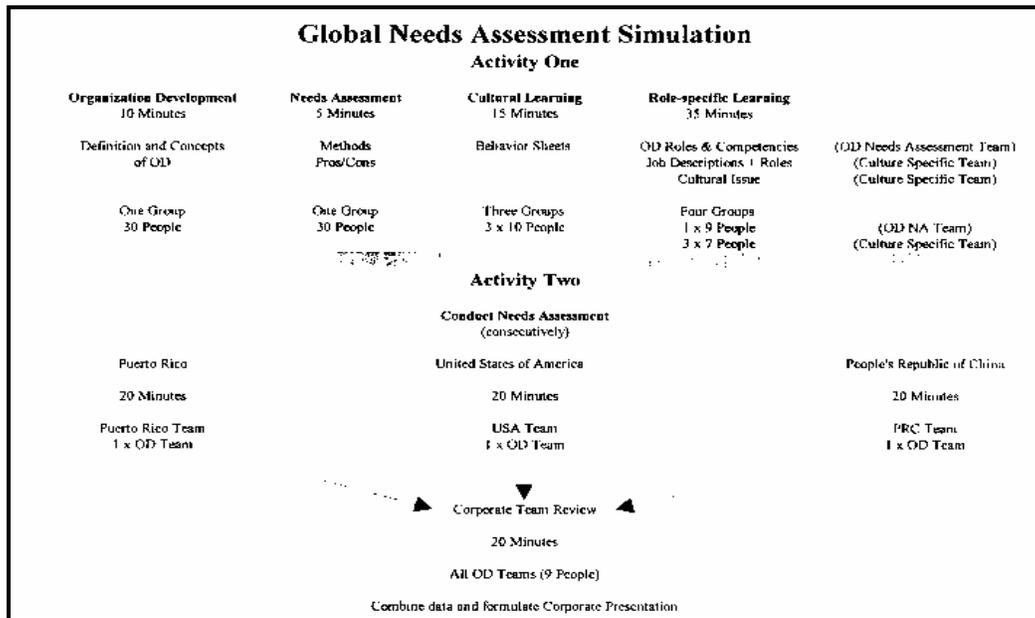


Figure 3 - Global Needs Assessment Simulation

**Evaluating the U of M Simulation Project**

At a spring, 1998 post-conference evaluation session, members of the U of M simulation team met to review the project and to determine whether reporting about their simulation experience to the academic community was warranted. The group believed that the project was important enough an undertaking to share the results with that community, and assigned tasks to those present. One of the assignments agreed upon was to determine how students felt about their involvement in the globalization simulation process.

I decided to use a case study approach based on the work of Merriam, Hultgren, Coomer, Smith and Heshusius in interpretive and qualitative methodologies. The case study method was chosen for several reasons:

- given an international, diverse student population, there might be multiple realities or ways of perceiving present in the participants;

- the purpose of this part of the reporting would be to inform HRD practitioners and Adult Educators by providing insights into the experiences of the simulation group;
- the ability to frame the research question in the broadest way would avoid constraining student responses or imposing the evaluator's own assumptions; and,
- given a goal of understanding and furthering cross-cultural interaction, it is important to recognize the different values that attach to subjective understanding in interactions.

I followed the reflective question, What Was It Like Being Involved in the Globalization Simulation Project, with probing questions that would further explore the participants' experiences in the preconference, a tenet of the *hermeneutic phenomenology* approach considered for this case study. I conducted individual interviews with seven of the eleven students involved in the project, creating interview logs to record both comments and interviewer perceptions. Since the school year was almost over, many international students would not be available for debriefing, so I did not conduct follow-up interviews for purposes of validation after the initial report was completed. Hence, I will only allude to follow-up questions as emergent themes are discussed.

#### *Themes*

I expected that commonalities among the interviews might arise in the preparation for training and the simulation, itself. Two major themes did emerge from participant responses to the interviews. The first theme related to the first project goal and concerned both simulation planning *and* development. The second theme related to the second goal and concerned the implementation of the group's work at the AHRD preconference held in Chicago in March, 1998.

Subthemes that emerged from simulation planning and development included the work processes required to plan the simulation and the relationships among the student planners. Subthemes that emerged from experiences at the preconferences in Chicago described the students' views about the mechanics of implementing the simulation and their perceptions about how the simulation was received by conference enrollees.

#### *Simulation Planning and Development*

Students welcomed the opportunity to learn more about their own and others' cultures. They found that the tasks required to research a country's cultural values as well as business values were both challenging and frustrating. One participant found it "somewhat uncomfortable, finding information without knowing where everything was going." Another commented that a real challenge was "meeting the academic requirements of an HRD conference," while coordination of the simulation was frustrating in that everyone was working on different parts of the project, and it was difficult to cull out the resources that mattered the most. Another participant said she felt that doing a presentation at an academic conference made her feel like a professional colleague.

Participants critically commented about the cross-cultural interaction in the group. Two international students identified their discomfort with a team process. One observed that she had never been involved in a team before, but that she liked the teamwork idea "because everyone has ideas and your own ideas are valued by others." The other preferred to work alone rather than in a group, and explained his discomfort because "the American concept of team is different . . . we were purposefully being vague as a part of the simulation project."

Participants occasionally found their perspectives challenged during the planning process, and discovered that the project helped them better understand their own values. One international student observed that

I would think something was very logical and made sense, but then others would question why.

I think of myself as open minded, but then I discovered that what I took for granted wasn't necessarily true. I know that I'm not there yet, and that I have to work very hard . . . to improve my sensitivity in cross-cultural interaction.

As another international student summarized, "the purpose was not to learn how to do a needs assessment, but rather to learn how to think and consider cross-cultural issues when you're dealing with cross-culture issues." That same student identified conflicting feelings where "one recognizes the opposing feeling held if having lived in other cultural settings."

A US American student found herself becoming more aware as she discovered that people had different ways of doing things in the group process. She found that her expectation for people to be on time was culturally-derived, and she observed "I am, most of the time, anyway." She also observed that the international students "seemed to know American culture."

#### *Simulation Implementation*

Implementing the simulation required students to present materials and guide a process for which they had only the most limited practice. As an international student observed, "I didn't know what to expect. We needed a real rehearsal beforehand; I did not know my role . . . I felt that as I was doing the simulation, itself, we needed more time for the exercises."

The vagueness designed into the simulation part of the project, where participants evaluated their responses to uncertain situations, highlights a divergence between the US American and international student expectations. One

of Hofstede's (1984) cultural determinants assesses the capacity to endure ambiguity, a national characteristic for which US Americans rank high. An international student confirmed that difference, observing that "the whole implementation was not smooth . . . we had to improvise and solve problems . . . the plan was not perfect, we needed more practice."

Most students believed that the globalization preconference could have been greatly improved by better linking the four simulations together, along with a more detailed preparation about Worldwide, Inc. training requirements. Students universally felt that there was not enough time to fully develop the simulation, and that separate rooms or partitions were needed to help create the proper mood for the individual scenarios. One student noted that "we had to whisper too much." Another suggested that the role playing setting could better reflect the simulated environment, including national flags of the targeted countries on group tables. One student felt that the business behavior statements could be more closely linked to the simulation roles.

Several U of M students agreed that it would have been more valuable if they could have attended all four preconference sessions; the concurrent simulation format prevented participation in more than two sessions, including the one already committed to. The remaining three simulations presented a difficult choice among attractive, yet competing sessions. Other students felt that time limits imposed during presimulation training, as well as during the simulation, made it impossible to quickly adopt a role. Earlier availability of the materials would have given participants greater opportunity to study the projected roles. As one student put it,

I truly thought that we could do everything in the time allotted, but I was wrong. [The simulation] showed me how truly difficult it is to simulate among many cultures. . . even trying to understand another culture, that you could attempt to adopt a role crossing cultures . . . it takes more than 20 minutes to understand another culture's perspectives.

The students applauded the preconference audience, whom they felt embraced the project whole-heartedly and "really got into it." The participants enthusiastically adopted their new personalities in the simulation; as one student noted, "I was pleased with how the participants got into character and assumed their roles." After the final session, one US student commented that it "was like being at the beginning of something special."

#### *Overall Simulation Experience*

Students most often described the project as "fun." I believe that characterization to be the result of positive interactions among students in a non-credit, professional academic opportunity, where shared experiences reinforced mutual learning. Most students said they would gladly participate in another simulation project, and the exceptions cited time or work limits as the only constraints to subsequent involvement.

Participants clearly demonstrated their satisfaction with the project by their persistence through five months of preparation. Only one student dropped out of the project, and the rest fed off of their joint enthusiasm.

One student characterized the project as "eye opening," where it was beneficial to have a variety of backgrounds, not just cultural, but work, age, different experiences . . . the strength of the group was in its diversity and in the different perspectives that we all brought to the table.

That same student described the student orientation over the course of the simulation project: "it was an entirely different type of learning. . . there were three kinds:

- research about a country, culture, and putting together a simulation
- interaction among the different cultural backgrounds on the team, and
- group facilitation skills: presenting the simulation, getting people to participate and to handle the unexpected."

An international student summarized her experience: "I learned how to organize, how the team worked; I saw that simulation worked and increased peoples' awareness." Another could well summarize for the entire group: "I would do it again, definitely. I enjoy cross-cultural experiences . . . it was a very enriching activity."

#### *Project Guidance*

I asked evaluation participants to comment about the project guidance in light of the first goal, creating a student-led organization. Universally, project participants felt that Professor McLean left the group alone to do what it needed to do to succeed, but that he "would be out there to make sure we didn't look like idiots." Students felt that McLean provided the structure when needed, but that he was "very confident [in our abilities] and made sure students felt that the simulation was ours."

### **Implications for HRD**

The themes that emerged from this case study point to a need to incorporate diverse cultures in cross-cultural training, grounded in the reality of a different culture rather than in a laboratory setting. U of M international student involvement clearly indicated that the training development process generated as many cross-cultural lessons as

participating in the formal training, itself. HRD practitioners might bear those lessons in mind when designing cross-cultural training.

#### *Globalization Simulation Conclusions*

The U of M participants in the 1998 AHRD globalization preconference felt that the learning objectives established for the project were met. The simulation development and subsequent implementation demonstrated the complexity of cross-cultural competence as well as a clear need to be continually sensitive to the issues that arise during cross-cultural interaction. The essential basis for communicating effectively was shown to begin with an understanding of one's own cultural influences.

The preconference created an opportunity for students to get a real feeling for the challenges of working with cross-cultural issues. This first attempt to engage universities in independently creating scenarios under a common umbrella generated positive reactions while suggesting ways to improve the concept for subsequent AHRD conferences. The U of M students thrived with the challenges borne of their inherent diversity and breadth of cross-cultural experiences, owing also to the framework created by McLean.

#### **AHRD and the Globalization Preconference—Anachronism or Hiatus?**

Subsequent AHRD conferences included globalization preconference sessions using Action Learning to focus on “real companies with real global issues” in Arlington, Virginia in 1999; contrasting US, Mexican, and Japanese cultures in Durham, North Carolina in 2000; American Indian customs and issues, with a Cherokee site visit in Tulsa, Oklahoma in 2001; and the impact of strategic human globalization on North American, British, and Pacific Rim business interactions in Oahu, Hawaii in 2002. The globalization preconference planned for Minneapolis in 2003 intended to explore immigrant issues relating to Hmong or Somali communities, but never took place. Five years after the first globalization preconference, the Academy had moved away from that forum. Is the globalization preconference an AHRD activity of the past, or does it await a renewed charge from the AHRD Board of Directors? How did the founding professors feel about the globalization preconference?

#### *Methodology*

I interviewed the founders of the globalization preconference as well as several scholars and practitioners involved over the years in preconference activities, using a case study methodology. As Merriam (1988) observes, a case “might be selected because it is an instance of some concern.” She adds, “unlike experimental, survey, or historical research, case study does not claim any particular methods for data collection or data analysis. Any and all methods of gathering data from testing to interviewing can be used in a case study.” Finally, the researcher selects this method because of an interest in “insight, discovery, or interpretation” rather than hypothesis testing (10-11).

#### *Conclusions and Implications for HRD*

Dilworth recalled running into McLean at the Durham conference: “He’d been actively getting feedback on the various preconferences. It’s grown . . . he made the comment that the only one that had any rigor and seemed to be still on course and doing what he thought was necessary, in terms of being substantive, was the global”—it was living up to its expectations. Dilworth believed that the globalization preconference needed to be marketed, as it “really feeds into the strategy of the academy, itself.” He added,

Things go away unless you put some focus on them. I can’t believe that the globalization preconference is not kind of an institutionalized affair now. . . . It’s one of the rudders . . . one of the things that keeps you on course, in terms of promoting globalization and fostering international contacts, collaborations, and connections.”

Nonetheless, the goal of institutionalizing the globalization preconference was apparently not met after the Hawaii conference. The reasons for the change are not clear, although some explanations were proposed by those whom I interviewed. According to Marquardt, “oftentimes the people from overseas did not want to come to a session on international; they were more interested in coming to hear what was going on in the US.”

An additional explanation may lie in another successful preconference activity—the emerging research course. If the globalization preconference typically drew a 50-50 mix of previous participants and newcomers, one might conjecture that many prospective student attendees were selecting a credit-earning option.

As far as the importance of globalization to AHRD, board member Darren Short (personal interview, Hawaii, March 2, 2002) suggested that “if we don’t have a preconference, it doesn’t get discussed,” although, he added, the main conference can involve the topic as related research is presented.

Short felt that one positive result of his five year’s of participation in the globalization preconferences was his learning “how to design these things.” More importantly, he gained a “much clearer perspective on what it’s like to be on the receiving end of globalization—something I never would have gotten from a book.” Short believed that some of the most innovative material was presented at the preconferences.

Terry Gray (personal interview, Hawaii, March 2, 2002), also an active participant in AHRD preconferences, noted that “globalization is an issue that people are struggling with.” He believed that the preconferences had expanded beyond defining the cross-cultural aspects of globalization to considering its impact on host countries. “The preconference is outside of the conference audience and activities; [it] focuses on the practitioner . . . the preconference and the symposia are disconnected.” Gray, like Short, felt that practitioners had taken the lead in running the preconferences, and that the participants generally came from the same core group of interested practitioners and scholars. In the final analysis, as McLean observed, the globalization preconference may not be popular every year, nor does it have to be offered every year.

What then is the future of HRD and globalization, and what is the responsibility of AHRD to further that involvement? Russ-Eft and Hatcher (2003) suggest that groups like AHRD should be responsible for disseminating a global code of ethics to members, and “for making the code known to students who will become future members of these associations.” Similarly, Dewey and Carter (2003), in summarizing the Future Search Conference devoted to HRD, presented 12 areas of common ground shared by participants in the 2003 Florida workshop. Two of the 12 areas could be directly linked to the AHRD preconference issue: *Creating Synergy Between Research and Practice*, where participants saw “the necessity of academic institutions and professional associations working in partnership with practitioners” while *Embracing Globalization*, “to foster increased creativity, productivity, and learning” (252).

Should the Academy recognize that major economic and geopolitical changes revolving about outsourced and peripheral labor, exploitation of limited resources, and massive relocation of refugees call for a more vigorous and directed response than that available through typical conference activity? Such current controversies suggest that some globalization issues might yet demand consideration by the academy through its preconference mechanism, rigorously marketing and supporting involvement for both current and future members.

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