

Roger Kaufman: Eternal mentor, loyal friend and a relentless pursuer of societal value added

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I first met Roger Kaufman as a Masters student at Florida State University's Instructional Systems Design program. I had completed my Bachelor's degree in Psychology, but previously focused my studies on philosophy and literature. This change in direction was rooted in my desire to have a clearer road to contribute something meaningful to society, and I frankly couldn't see how a pondering philosopher with a deep appreciation for existential literature could find a practical way to make a living by helping others. Someone mentioned to me that our university had one of the most respected programs in Instructional Systems Design, for which my background in Psychology was a good fit. So, I quickly applied and was accepted into the program and did enjoy the rigor of the theories and methodologies I was learning, and the rigor of the program as a whole. However, something was missing...I couldn't quite find personal meaning in what I was studying and doing, though intellectually, I saw the value.

Then, one semester, my life would be changed forever, when I took Roger Kaufman's Needs Assessment and Strategic Planning course. From day one I realized that at last I had found what I was looking for. Finally, someone and something that made complete sense. I couldn't get enough of Roger's writings, lectures, insights, and stories. So, before the semester was over, I asked him if he would consider serving on my master's committee. He replied, "Under one condition...that you stay for your doctorate." And that was the beginning of his ongoing mentorship, friendship and support that has lasted until this day.

Roger Kaufman's countless academic and applied contributions to performance improvement, strategic planning, management, and learning fields is well document. Roger's countless achievements, recognitions, and awards are also well documented. What I would like to recognize here is Roger Kaufman as a giving individual and mentor and how he and his work have impacted my career and life. My case is just one among many, many cases, where Roger has provided inspiration, insight, encouragement, and never-ending support and guidance to do the right things in the right way.

Johann Wolfgang von Goethe once said that "there is nothing more frightful than ignorance in action" and I have to say that precisely one of the greatest lessons I learned from Roger

Kaufman is to always lead action with evidence. That lesson has impacted every aspect of my personal and professional life and cannot be separated from my research and applied work.

Roger Kaufman gave me my first taste of an academic's life by allowing me to eventually assist him in teaching the very course that had changed my life, Needs Assessment and Strategic Planning. He always made me feel like I had something important to say and asked me for feedback and how he could do better. Not everyone was ready for real system thinking. Acknowledge personal responsibility for contributing to a better society is quite scary for some. But the impact that he had on student's view of themselves and the world was undeniable. I learned about having the courage to stand for what you feel is right, even if not everyone agrees.

Roger also invited me to work with him and eventually become a Project Manager at the Office for Needs Assessment and Planning while I completed my doctoral program, where he deposited in me confidence and freedom to do worthwhile work, even before I realized that I was capable of such work. This included leaving me to represent him and his work to an Argentinian Delegation of more than 30 politicians while he flew to Australia for other professional commitments. I honestly thought I would die and would have preferred to complete 30 doctoral dissertations than to try to fit into his shoes. But, as with many other experiences he exposed me to, I not only survived, but grew.

During my time at the Office for needs Assessment and Planning, I had the opportunity to do real and rigorous needs assessments and apply all of the principals and ideas so fundamental to his work: system thinking, strategic thinking; clearly distinguishing means from ends, and realizing when a solution had been picked in search of a non-defined problem; and most of all, that everything we use, do, produce and deliver must be purposeful aligned to adding measurable value to society.

All of these ideas drive my own pursuit of measurable value added and strategic alignment, and have had a profound impact on my work, my students, clients, peers, friends, and family. Inspired by Roger's relentless focus on evidence, I focused my research and practice in performance measurement and evaluation, specifically the systematic design of performance measurement systems that generate relevant, reliable, valid, and complete data to make performance improvement decisions.

Building on the importance of evidence, measurement and value added led me to create the Impact Evaluation Process, which was based on Roger's Organizational Elements Model (OEM). The OEM aligned societal, organizational, and team/individual results, as well as the required processes and inputs. The OEM which itself rested on system and strategic thinking was also the inspiration for my performance indicator mapping approach to identifying and aligning organizational metrics. His work has also inspired my extensive work with strategic alignment, both as a management consultant and academic.

Likewise, Roger has also inspired the perspectives and work of my students and clients who have grown to know, respect, and follow Roger's work well. Many of my students who themselves have become academics and/or practitioners also continue to spread his work to others. He is indeed the gift that keeps on giving.

I am grateful for the countless learning opportunities and invaluable projects that Roger invited me to collaborate on, including Florida Division of Blind Services, United States Navy, Local Government in Argentina, Sonora Institute of Technology (ITSON), and countless others including co-authoring a best-selling book and various other books and articles with him). Roger's work continues to live and multiply through my work as an academic, and as a consultant, as I use conceptual frameworks based on his ideas, principles, and models. Consequently, this has led me to extensive work in International Development work with organizations who also focus on making this a better world such as the World Bank, the United Nations, the Inter-American Development Bank, and the United States Agency for International Development among others.

I have to say that now as a mentor and coach to countless students, clients, colleagues, and friends, I still look for Roger for advice and insight. He is a relentlessly selfless person who doesn't know how to exist without helping others and challenging them to be better than they were the day before. I can tell you of countless occasions where I found him counseling perfect strangers on how they might improve their lives....whether students, mid-career professionals, seasoned leaders, or even a young sales person at an electronics store!

This is why anyone who has ever met him can tell you that not only is he an amazing intellect, but more importantly, he is an amazing human being and I am forever indebted to him for helping me find meaning in my work. After nearly 20 years, he still takes every opportunity to support and promote me (and of course to keep me busy with exciting collaborations!).

Roger, you were right...as usual.... life is about maximum degrees of freedom to do what you believe in.

Selected Readings

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About Ingrid Guerra-López

Ingrid Guerra-López, PhD is Professor of Learning and Performance Systems at Wayne State University as well as Founder and Chief Executive Officer of the Institute for Needs Assessment and Evaluation. She is the past Editor-in-Chief of the International Society for Performance Improvement (ISPI), research journal *Performance Improvement Quarterly* and has also served on the Board of Directors of ISPI. She co-authored with Roger Kaufman the Association for Talent Development's (ATD) best-seller *Needs Assessment for Organizational Success*. She has authored other widely used books that have become performance evaluation standards in the field such as, *Performance Evaluation: Proven Approaches for Improving Program and Organizational Performance*. Her latest book is titled *Strategic Alignment and Talent Development*.

Dr. Guerra-López's work focuses on improving human and organizational competence through strategic measurement and alignment (needs assessment, monitoring and evaluation, including the identification and mapping of performance indicators). Dr. Guerra-López has worked internationally with clients across a variety of sectors, including USAID, The World Bank, The Inter-American Development Bank, United Nations, U.S. Naval Education and Training Command; General Motors, Chrysler, Mercedes Benz, Metropolitan Life Insurance Company, Amway International, among many others.

She has received a number of prestigious awards for her work, and published six books and nearly 100 articles on some of most respected journals in performance improvement, evaluation, and management, dedicating her career to disseminating evidence-driven and strategic performance improvement practices internationally in over 40 countries.

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