

2006 MEASUREMENT, EVALUATION, AND ROI CONFERENCE-WITHIN-A-CONFERENCE

Justify, Manage,
Improve a Learning
Enterprise with Four
Evaluation Events

M 12:00-1:15 p.m.

Making the
Business Case

M 2:15-3:30 p.m.

Panel Discussion ft.
Brinkerhoff, Fitz-enz,
Kirkpatrick, and
Phillips

M 4:00-5:30 p.m.

Using Needs
Assessment to
Drive Business
Results

T 10:00-11:15 a.m.

Evaluation System
Design

T 1:45 – 3:00 p.m.

A Practitioner's
Roadmap for
Data-Driven ROI

T 4:00-5:30 p.m.

Also plan to attend an engaging session on Eli Lilly's strategic journey to implement evaluation
W 9:30 – 10:30 a.m. ROI Networking Room A304

Using Needs Assessment to Drive Business Results, 5/9/2006



Vanda Vieira

CECOA - VOCATIONAL TRAINING
CENTRE FOR THE TRADE
PORTUGAL

www.cecoa.pt



Using Needs Assessment to Drive Business Results, 5/9/2006

Learning Objectives



Abstract

Needs assessment and evaluation are critical to achieving business results.

To focus on needs assessment and the value it provides?

Designing a needs assessment to identify gaps
Defining anticipated business results.



Learning Objectives



Agenda

- Learning Objectives
- Focus on Needs
- Focus on Methods
- Focus on Value



Learning Objectives

> Case Studies and European Projects

- Needs Assessment, Chamber of Commerce
- ROI - Return on Training Investment
- ELQ-SME's - E-Learning Quality for SME's
- Competencies Development through Self-learning in Services SME



Learning Objectives

> At the End of the Session...

- To recognize the relationship between needs assessment, designing for results and evaluation
- To recognize the various methods for conducting a needs assessment
- To create a plan to advance the use of needs assessment and evaluation in your organization



Focus
on Needs



Needs Assessment to Identify Gaps

Actual qualification

Estimate qualification

Real performance

Ideal performance



What you do?

What should you do better?

How you do?

How should you do it better?



Focus
on Needs

> Needs Assessment to Identify Gaps

"Ask the participants"

"Ask the bosses of the participants"

"Ask others who are familiar with the job and know how it is being performed, including subordinates, peers and customers"

"Test the participants"

"Analyze performance appraisal forms"

Legal copyright notice: Information drawn from Evaluating Training Programs: The Four Levels Third Edition, Donald L. Kirkpatrick and James D. Kirkpatrick, Berrett-Koehler, Inc, San Francisco 2006.



Focus
on Needs

> Some Constrains

- Lack of time to develop needs assessment
- Lack of involvement from employers and employees
- Lack of function definitions
- Lack of qualified employees to coordinate needs assessment
- Lack of performance appraisal evaluations
- Lack of a pro-active action plan



Focus
on Needs

> Opportunities and Challenges

Why? Some **Solutions:**

- Work as a “learning facilitator”
- Involve all organizational levels through a clear strategy and practical measures
- Analyze correlation between the organizational structure and the business results
- Redefine functions and organizational processes





Case Study

Needs Assessment of the Chamber of Commerce and Industry of Ponta Delgada

www.cecoba.pt



Learning
Objectives

> Needs Assessment of the Chamber of Commerce

Objectives

- Collect attitudes towards training
- Reflect about the organizational problems/gaps
- Be aware of the training investment obstacles
- Align the skills with business impact and the market demand



Focus on
Methods



Methodological Requirements

- Universe – 900 enterprises
- Sample – 10%
- Methods and techniques
- Procedures
- Analysis of Results



Focus on
Methods

> Methods and Techniques

Questionnaires:

- 1) To characterize the "request"
- 2) To measure attitudes towards training
- 3) To rate training products and services

Interviews:

- 1) To collect difficulties and gaps



Focus on
Methods

> Organizational Diagnosis

Questionnaire target to the CEO

- To design the strategy in order to reach the companies needs
- To conceive the methodology and tools
- To train local interviews
- To validate the results with the clients



Focus on
Methods

> Questionnaire target to the CEO

1. Facts about the Chamber of Commerce

- 1.1. Mission and values
- 1.2. Main activities, products and services



Focus on
Methods



Questionnaire target to the CEO

2. Expectations about the needs assessment

2.1. Objectives and expected results

2.2. Scope

2.3. Stakeholders

*Who will be involved internally?
Who will be involved externally?*



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Focus on
Methods

> Questionnaire target to the CEO

3. Characterization of the Enterprises

3.1. Main difficulties

3.2. Clients satisfaction and motivation to life long learning

Evaluation Level I



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Focus on
Methods



Questionnaire target to the CEO

4. Characterization of the Training Services

4.1. By training modality – On job training, Inter-companies...?

4.2. By number of Trainees x Hours x Companies

4.3. By skills acquired - Evaluation Level II

4.4. Barriers and challenges – Prospective analyses



Focus on
Methods

> Associates Diagnosis

1st Questionnaire:

To collect their perception and opinions about training

Individual interview:

To characterize the employers training needs and benefits from previous courses

2nd Questionnaire:

To collect relevant information about the training align with their business results and future impact



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Focus on
Methods

> 1st Questionnaire target to the Associates

Total disagreement

1

2

3

4

5

Total agreement

The training increased my employees satisfaction and motivation

Evaluation Level I

I expect my employees will improve their skills after the training

Evaluation Level II

I think training courses will grown my employees performance

Evaluation Level III

I will invest in training to reach business impact and better results

Evaluation Level IV

Training was a positive return connected with the business

ROI Evaluation



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Focus on
Methods

> Interviews target to the Associates

1. Which skills will your company need? (open question)
2. What difficulties are you facing now?

2.1. Price of products/services

YES

NO

2.2. Quality of products/services

2.3. Production time

2.4. Logistics

2.5. Lack of workers initiative

2.6. Resistance towards change

2.7. Absenteeism



Focus on
Methods

> Interviews target to the Associates

3. Identify gaps in your company

- | | |
|--------------------------|--|
| <input type="checkbox"/> | 3.1. Management and administration |
| <input type="checkbox"/> | 3.2. Finance and accountability |
| <input type="checkbox"/> | 3.3. Project planning and implementation |
| <input type="checkbox"/> | 3.4. Marketing |
| <input type="checkbox"/> | 3.5. Sales |
| <input type="checkbox"/> | 3.6. Team building |
| <input type="checkbox"/> | 3.7. Security at work |
| <input type="checkbox"/> | 3.8. Informatics |

4. How are you planning to solve the situation?



Focus on
Methods

> Interviews target to the Associates

5. Chamber of Commerce (CC) training offer will be part of your solution?

5.1. Training areas?

5.2. Training schedule?

5.3. Training investment?

How much will you able to invest?

5.4. Threats and opportunities of training



Focus on
Methods

> 2nd Questionnaire target to the Associates

1. Enterprise identification
2. Characterization of Human Resources
3. Characterization of the Training Initiatives

- 3.1. Training areas
- 3.2. Level of satisfaction
- 3.2. Acquired skills
- 3.4. Barriers of the knowledge transfer
- 3.5. Threats and opportunities

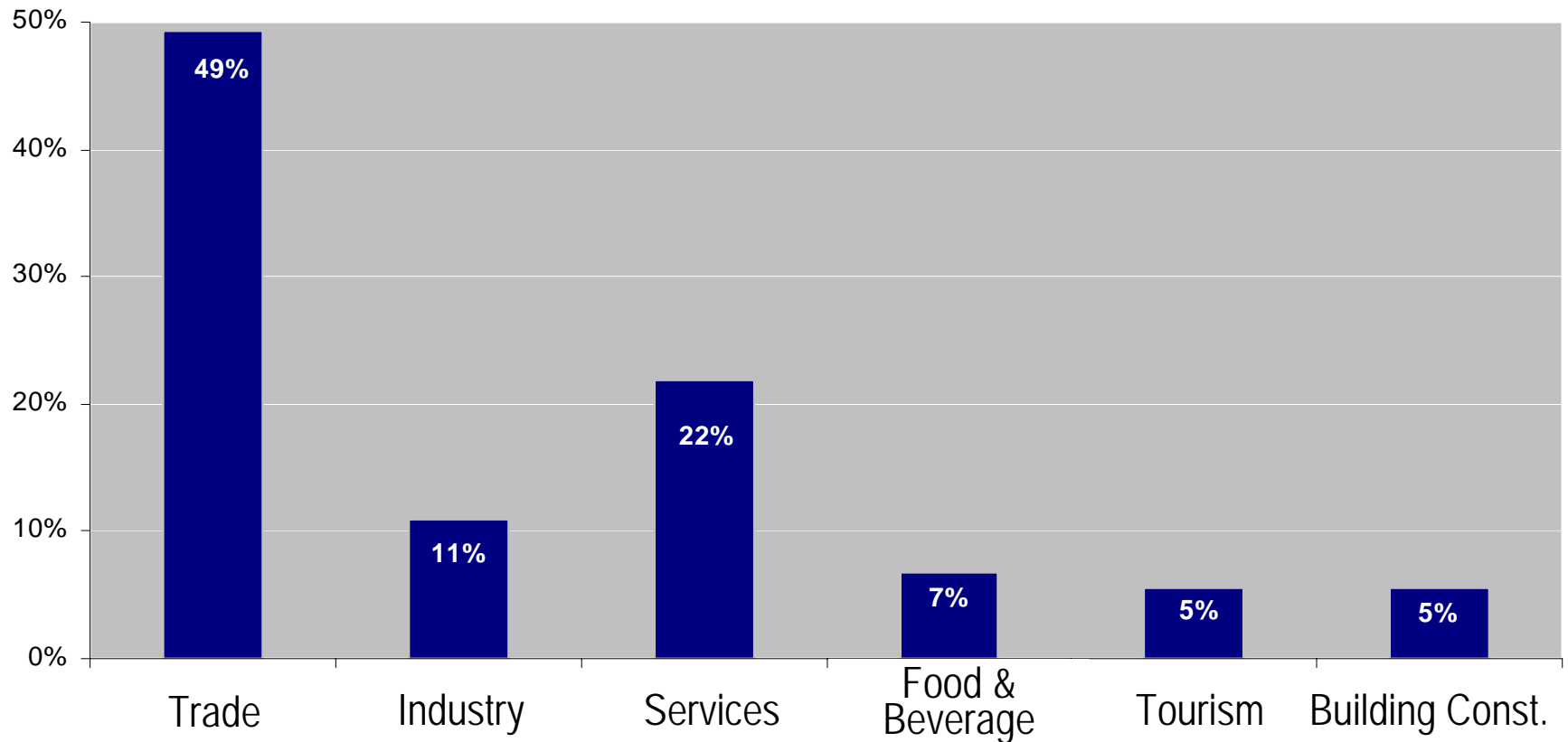


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Focus on
Results



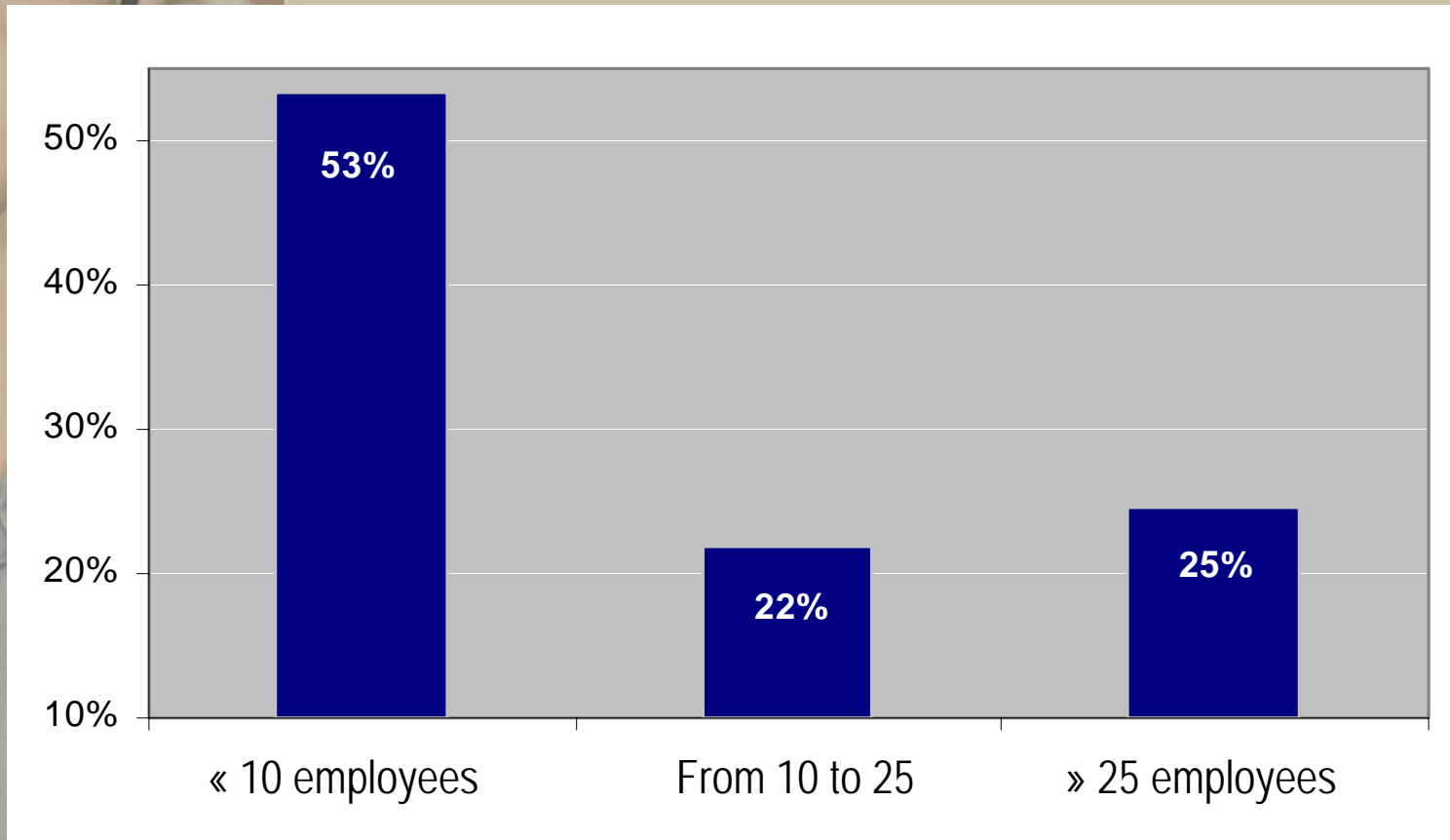
Companies by Business Sector



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Focus on Results

> Companies by Number of Employees



Focus on
Results

> To share results/suggestion with the Stakeholders

- To develop statistic analysis:
 - By business sector
 - By dimension
 - By the training modality
- To present a report to the stakeholders
- To involve them in discussion of the proposed solutions



Focus on
Results

> Attitudes towards Training

- Managers considered training as a positive measure to reinforce the employees competencies (3.87 as average)
- There were no expressive differences between business sectors and companies dimension.
- Benefit: research of a set of intentions and tendencies towards the training impact
- Disadvantage: the results don't specified the training offer selected by the companies.

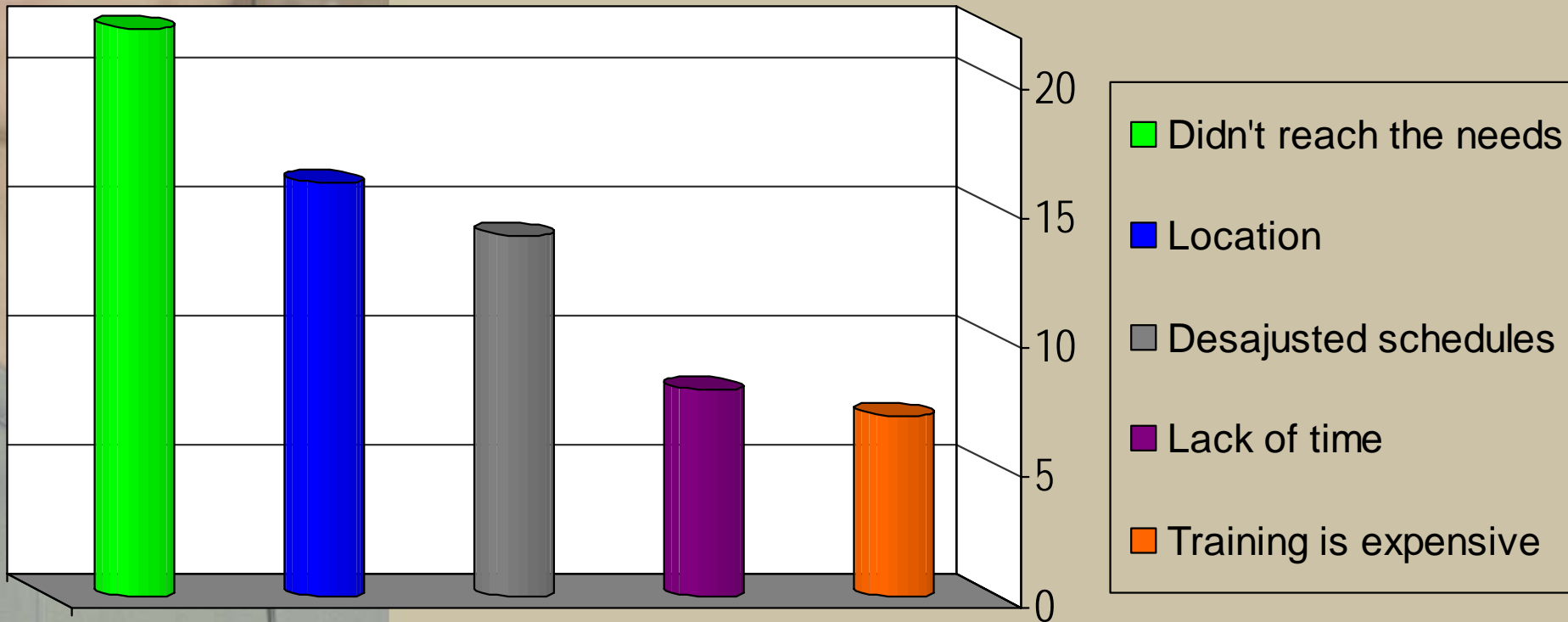


Using Needs Assessment to Drive Business Results, 5/9/2006

Focus on
Results

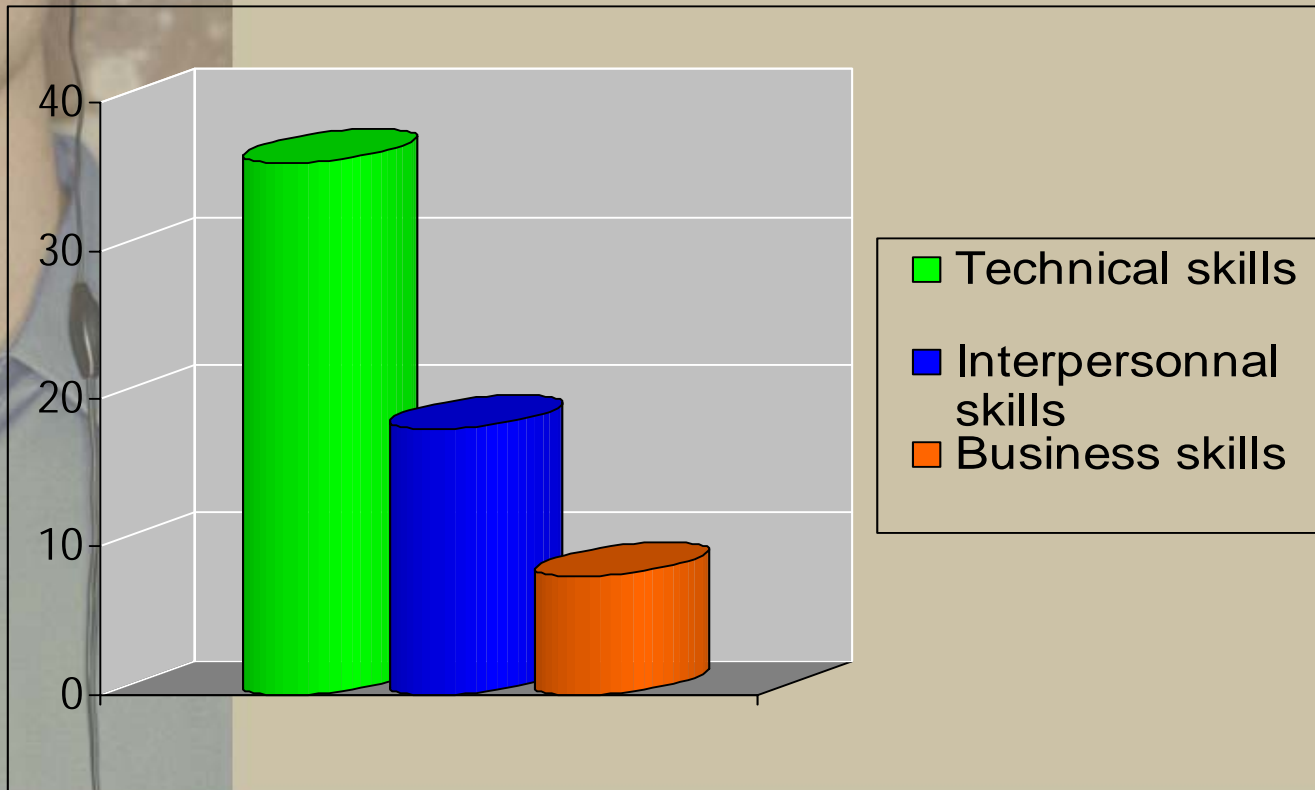
> Main Obstacles of the Training Investment

Why didn't you select the training offer of the Chamber of Commerce?



Focus on Results > Required Skills

Which were the "macro skills" considered essential by the employers?



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Focus on Results > Required Skills

Which were the “micro skills” considered essential by the employers?

Technical skills



Clients support and assisting
Responsibility / autonomy
Stocks management

Interpersonal skills



Efficiency
Innovation
Creativity

Business skills



Administration and finance



Focus on
Results

> Organizational and Performance Problems

Which were the difficulties identified by the employers?

- Price of products/services (29%)
- Deadlines of products delivered (22%)
- Employees lack of initiative (22%)
- Employees lack of competencies (22%)



Focus on
Results

> Organizational and Performance Problems

Which were the gaps expressed by the employers?

- Analysis of financial projects (23%)
- Clients support and assisting (19%)
- Sales Techniques (18%)
- Supply and Stock Management (18%)
- Marketing (14%)

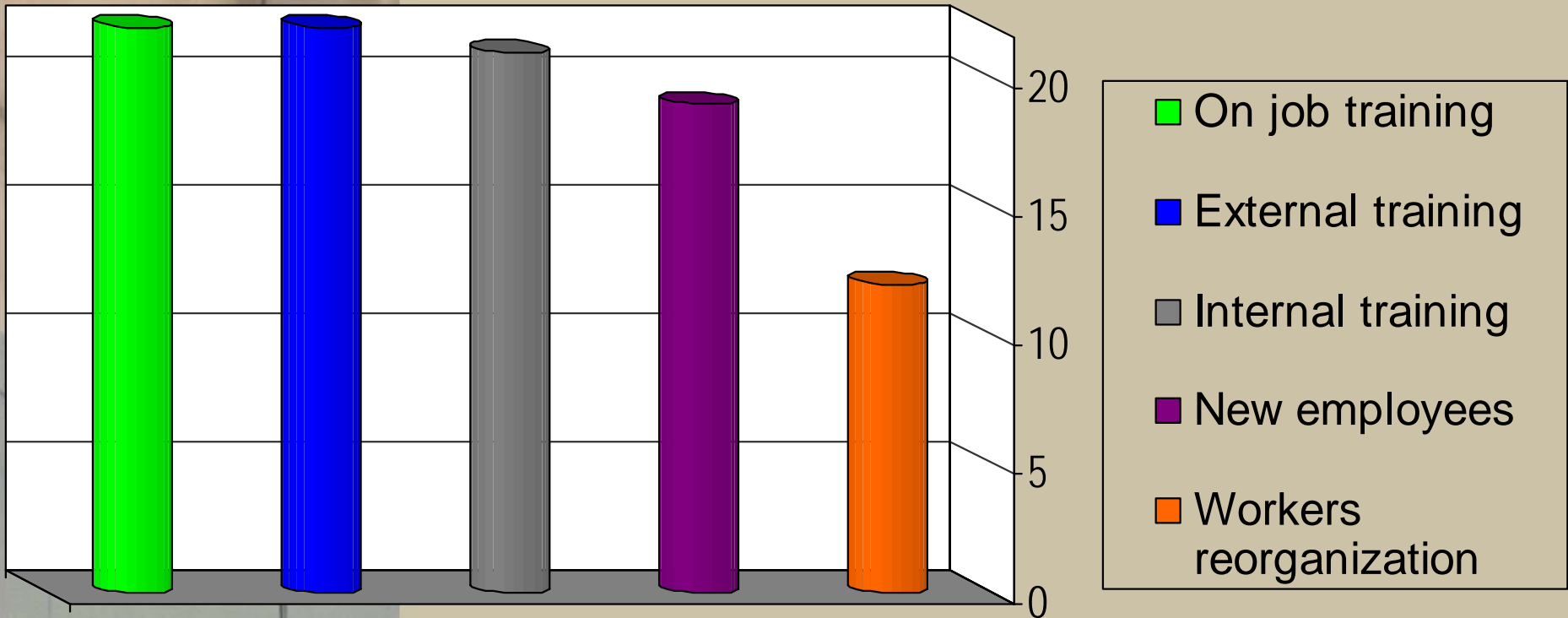


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Focus on
Results

> Solutions

How are you planning to solve those gaps?

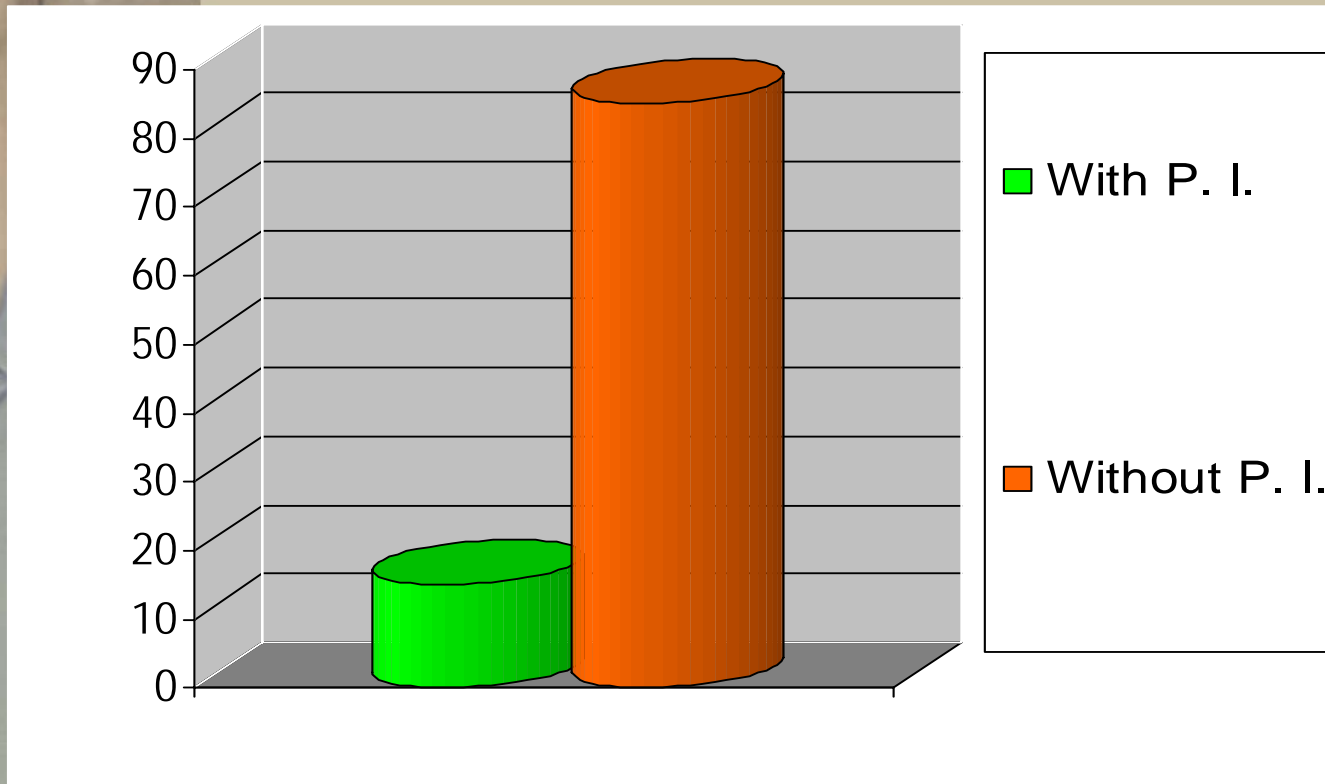


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Focus on
Results

> Analyze of the Training Offer

How many enterprises obtain performance improvement after the training?



Focus on
Value

> Conclusions

- Enterprise perceived the training as a positive measure to solve gaps
- Only 35% of the Associates were effective clients and 85% Didn't achieved improvement after the training
- 22% of the enterprises expressed that the training offer didn't reach their needs
- 66% of all subjects presented that Chamber of Commerce will be able to answer the market demand



Focus on
Value

> Conclusions

- Services improvement: training delivery and evaluation system
 - Portfolio by business sector and transversal training areas
 - Modular courses and changes in the training schedule
 - New training areas (23% to project finance and management and 14% to ICT's)
 - Learning development certification



Focus on
Value

> Communicate the results and provide future impact

- To present the main results to the associates (small, medium and larger companies)
- To insert changes and improvements in the Chamber of Commerce training offer in order to provide effective training courses



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European Project

ROI - Return on Training Investment

www.cecoa.pt



Learning Objectives

> Return on Training Investment

Purpose

- To promote and reinforce the contribution of vocational training to the process of innovation

Partners

- 11 partners from 7 European countries

Portugal, Austria, Bulgaria, Check Republic, Finland, Greece and Romania

Duration: 30 months



Learning Objectives



Return on Training Investment

General Objective

To conceive and develop a **methodology** and a set of **tools** allowing training providers, companies (namely the SME's) and other stakeholders to **evaluate the return on training investment**.



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Focus on
Needs

> Return on Training Investment

What needs did this project address?

- Managers didn't recognize benefits with the investment in vocational training and the add-value of training to their workers;
- It's extremely difficult to convince managers in accepting that training could have positive results upon their teams conduct and, in this way, give a contribute to the objectives of the company;
- The common way of doing the evaluation is just evaluation level I.



Learning Objectives

> Return on Training Investment

What were the specific aims of the project?

- To built a tool to calculate the connection between cost/profit;
- To conceive a methodology and a set of tools to able training providers and companies to evaluate the "training validity" and the "transfer validity";
- To test the methodology and the tools on a wide sample in several European Countries and to spread the results to other countries.



Focus on
Results

> Products and Results

- ✓ State of the Art Report
- ✓ Evaluation & ROI Glossary
- ✓ ROI Evaluation Model
- ✓ ROI Methodology
- ✓ ROI Indicators
- ✓ ROI Tools and testing at SME's European context
- ✓ Training the Trainers at ROI Evaluation Measures
- ✓ ROI Dissemination Strategy



Focus on
Methods



State of Art in Europe about Training Evaluation

Purpose:

To identify precisely the "State of the Art" of the evaluation on vocational training in all countries of the partnership, aiming to define the future development of the conception and development work.

Situation Survey:

- Why it is evaluated?
- Who does the evaluation?
- Who is evaluated?
- What is evaluated?
- In which moments the evaluation is done?



Focus on
Methods

> Methodology focused on the Needs Assessment

Diagnosis:

To characterize the target organisations namely by the detection of the main obstacles to the assessment as well as the facilitating factors to the development of other type of measures.

Techniques: Face-to-face interviews and distance interviews (phone or email).

Sample: Enterprises with less than 50 employees



Focus on
Methods

> Evaluation Indicators

Long List of Indicator with: 68 Indicators

Short List of Indicator with: 20 Indicators

Final List of Indicator with: 4 Indicators

Productivity per employee

Income per employee

More / new customers

Turnover decrease



Focus on
Methods

> Procedures

1. Present the assessment and evaluation goals
2. Explain the evaluation criteria
3. To show the importance of the organisation into the assessment validation
4. To guarantee a good environment for the interview and make clear the objectives, results, schedules, participants, roles, etc
5. To make clear each phase and to allow participants to become aware of the engagement in all process



Focus on Methods

> Checklist of Assessment Items:

- **Human resources identification** (distribution by age, time in the company, qualifications, professional experience, etc)
- **Training activities and policy** (courses planned/executed by year/employee, training modalities, investment applied, etc.)
- **Type of training assessment** (description of the measurement and evaluation processes and actors involved)
- **Evaluation of the training investments** (reasons, main benefits and weaknesses)
- **Know how transfer into the workplace and ROI indicators assessment**
- **Useful information** (namely the existence previous information, knowledge management, quality certification, etc)



Focus on
Methods

> Training Needs Assessment Questionnaire

1. Employer Information

2.1. Company Information

- A) Address
- B) Year of foundation
- C) Main activities
- D) Company objectives

2.2. Company strengths and weaknesses



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Focus on
Methods



Training Needs Assessment Questionnaire

3. Organizational Problems (checklist)

	Very Weak	Weak	Sat.	Good	Very Good	N A
A) Absenteeism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B) Failures/ Mistakes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C) Staff turnover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D) Lack of initiative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E) Resistance to change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F) Employees dissatisfaction with the remuneration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G) Employees dissatisfaction with the tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
H) Employees dissatisfaction with the working environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Focus on
Methods

> Training Needs Assessment Questionnaire

4.1. Skills Checking

From the following alternatives select the most appropriate option of the level of competencies of your employees

4.1.1. Business skills:

4.1.2. Human relations skills:

4.1.3. Customer skills:

4.1.4. Language skills:

4.1.5. Others skills:



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Focus on
Methods



Training Needs Assessment Questionnaire

4.2. Improvements expected with the training

Very Weak Weak Sat. Good Very Good N A

	Very Weak	Weak	Sat.	Good	Very Good	N A
A) Productivity increase per employee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B) Income per employee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C) Customers number increase	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D) Turnover decrease	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E) Customers satisfaction increase	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F) Better customer response time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G) Reduction of complains	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
H) Employee satisfaction increase	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I) Team performance increase	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
J) Products and services quality improvement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4 Indicators



Focus on
Methods



Training Needs Assessment Questionnaire

4.3. A) When do you plan to do the training?
During or after working time?

4.3. B) What's your sensibility about the employees' receptivity?

5. Planning and developing the company skills

A) Next year which skills will be necessary to your company?



Focus on
Results

> Information analyze and links to training results

- To design and plan the training courses
delivery:

Reactive approach > courses from the catalogue

Proactive approach > tailored made training

- To follow the training implementation

- To collect the real changes after training



Focus on
Methods

> Impact Evaluation

1. Changes (open question)
2. Training importance to the employees
3. Please list up three skills which your employees actually apply in work from the training course.
4. Mention the barriers to the skills transfer on the job?
5. Which of the following reasons prevent your employees from applying the new skills on the job?



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Focus on
Methods



Impact Evaluation

6. Benefits of the training course

- A) Productivity increase per employee
- B) Income per employee
- C) Customers number increase
- D) Turnover decrease
- E) Customers satisfaction increase
- F) Better customer response time
- G) Reduction of complains
- H) Employee satisfaction increase
- I) Team performance increase
- J) Products and services quality improvement

4 Indicators

Benefits by
priority
order

%
Improve
ment

Confidence
expressed
%



Focus on
Value

> Communicate the results

- Report of the Methodology Application

To communicate the results and adapted the methodologies

- Business Case Guideline

To communicate the training evaluation process

www.srep.ro/roi2



Focus on
Value

> Business Case Guidelines

1. Background
2. Training Description
3. Strategic Alignment
4. Cost/Benefit Analysis
5. Conclusions & Recommendations
6. Implementation Strategy



Using Needs Assessment to Drive Business Results, 5/9/2006



European Project

ELQ-SME's - E-Learning Quality for
SME's: Guidance and Counseling

www.cecoa.pt



Learning Objectives

> E-Learning Quality for SME's

Purpose

- To promote and reinforce the contribution of vocational training to the process of innovation

Partners

- 7 European Partners

Portugal, Austria, Estonia, Germany, Spain, Netherlands and Norway

Duration: 24 months



Learning Objectives >

E-Learning Quality for SME's

General Objective

To promote the use of the **new multimedia technologies** and a **guidance and counselling** approach in order to improve the quality of learning by facilitating access to online resources and training services as well as **tools to evaluate the quality** and the **return on investment in e-learning** targeted in SME'S from the trade and services sector.



Focus on
Needs

> E-Learning Quality for SME's

What needs did this project address?

- Difficulty on coordinating working timetable with availability to vocational training courses;
- High level of job rotation;
- Strong resistance towards e-learning;
- Implementation of e-learning through top-down approach and the commitment of the company decision makers.



Learning Objectives

> E-Learning Quality for SME's – ELQ-SME's

What were the specific aims of the project ?

- To evaluation of the SME's organizational needs, requirements, quality criteria and attitudes towards distance learning;
- To create Project Local Committees involving the end users;
- To train training consultants on Performance Improvement Programs;



Learning Objectives

> E-Learning Quality for SME's

What were the specific aims of the project?

- To benchmark of e-learning courses focused on the needs of SME's managers, owners and other decision makers;
- To develop products to support employers and training providers to implement sustainable e-learning solution;
- To disseminate the results through training consultant's guidance and counselling using ROI as a quality tool.



Focus on
Results

> Products and Results

- ✓ State of the Art Report on Distance Learning Quality
- ✓ Training Profile
- ✓ Guide for Training Consultants: e-Learning Quality and ROI Evaluation
- ✓ Guide to Conceive and Evaluate e-Learning Courses for SME's Entrepreneurs
- ✓ Guide to Conceive and Evaluate e-Learning Courses for Training Providers



Focus on
Methods

> State of Art Report on Distance Learning Quality

Purpose:

To assemble the connection between the offer the demand of distance learning courses of the trade and services sector

To collect quality indicators and criteria



Focus on
Methods

> Methodology focused on the Sector Diagnosis

Case description template:

To remind of the information interviews should look for and as a suggested outline for the case descriptions.

The cases could include additional issues of interest that is not covered in the template.



Focus on
Methods

> Methodology focused on the Sector Diagnosis

Methodological approach

SME: "...is made up of enterprises which employ fewer than 250 persons and which have an annual turnover not exceeding 50 million euro...."

Techniques: Face-to-face interviews and distance interviews (phone or email).

Sample: 2 case studies per country



Using Needs Assessment to Drive Business Results, 5/9/2006

Focus on
Methods

> Case Description Template

Name and URL institution	
Number of Employees	
Revenue in 2005	
Experiences with e-learning since	
Business sector	
Target group/participants in e-learning	
Content	
Form	
Interviewed people	



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Focus on
Methods

> Case Description Template

1. Description of how the institution has used e-learning
2. Description of direct and indirect effects and outcomes of the e-learning activities
3. Description of challenges and barriers
4. Description of success factors
5. Description of e-learning investments, development costs and operational costs



Focus on
Methods

> Case Description Template

1. Description of how the institution has used e-learning
 - Description of e-learning courses provided
 - Number of employees involved in each of the courses
 - Description of e-learning platform and other relevant technology issues
 - Description of the course development process
 - Description of the course administration process



Focus on
Methods

> Case Description Template

2. Description of direct and indirect effects and outcomes of the e-learning activities

- Completion rates
- Satisfaction

3. Description of challenges and barriers

- Technical issues
- Organizational issues
- Economical issues
- Other issues



Focus on
Results

> Information analyze and links to training results

- To establish systems and procedures for quality management and quality assurance in the training sector
- To promote the process of convergence, transparency and mutual recognition
- To suggest recommendations, requirements and develop products to support diverse target-groups



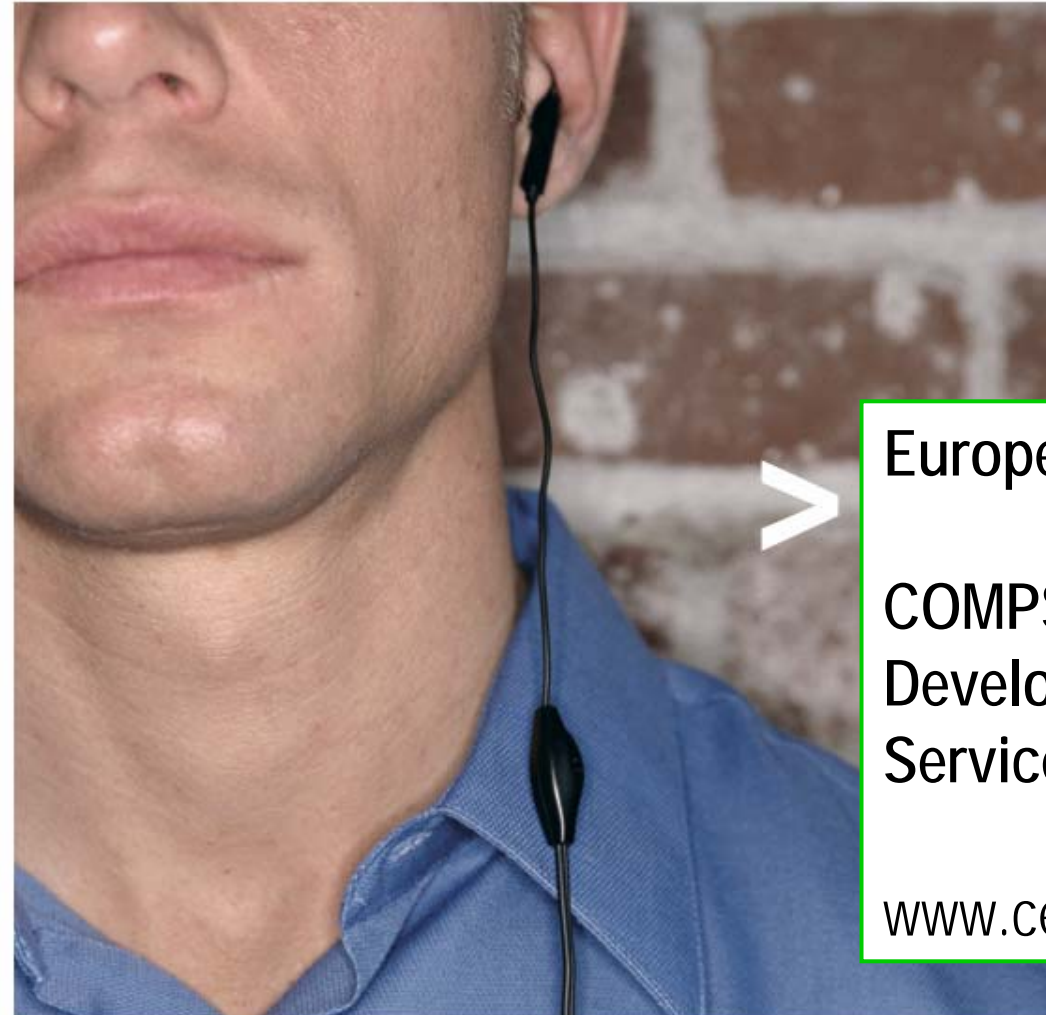
Focus on
Value

> Communication Plan

MEASURES AND INDICATORS

- Workshops
- Seminars
- Focus-groups
- Demos sessions
- Blog
- Website





European Project

COMPSERV - Competencies
Development through Self-learning in
Services SME

www.cecoa.pt



Learning Objectives

> Competencies Development through Self-learning

Purpose

- To promote and reinforce the contribution of vocational training to the process of innovation

Partners

- 12 partners from 6 European countries

Portugal, Denmark, Italy, Germany, Malta, Slovakia e United Kingdom

Duration: 24 months



Learning Objectives

> Competencies Development through Self-learning

General Objective

To support the emergence of a new professional profile for facilitators of training addressing the SME's needs, by developing and testing a package of methodological tools for facilitators of learning processes, more adequate to the lifelong learning processes.



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Focus on
Needs

> Competencies Development through Self-learning

What needs did this project addressed?

- SME in Europe need to undertake continuous investment for competences development;
- Competences development leads besides others factors to a higher motivation and commitment towards the organization;
- It is necessary to find a way to broaden the traditional concept of learning upon with most forms of learning and training as well as new policy measures are based.



Learning Objectives

> Competencies Development through Self-learning

What were the specific aims of the project ?

- To establish an intercultural team work to guarantee a good working partnership
- To develop a facilitator guide for mentors that will support development of competencies of workers and the organizations
- To bring facilitators to a work learning test in-company



Learning Objectives

> Competencies Development through Self-learning

What were the specific aims of the project ?

- To involve facilitators with the conception of a set of self-learning instruments aiming to create self-reflection processes to support development of competencies of workers and organizations
- To analyze the results of different sub-sectors test in order to adjust the tools according the needs



Focus on
Results

> Products and Results

- ✓ Intercultural Platform
- ✓ Reports per country on state of art
- ✓ Synthesis report on the analysis in every country partner
- ✓ Facilitators Guide to support implementation of learning process
- ✓ Package of self-learning instruments for learning in SME's



Focus on
Methods

> State of Art Analysis

Purpose:

To investigate the state of art in each region involved, the facilitators profiles and existing tools and methodologies in several sub-sectors in order to produce more user oriented products.



Focus on
Methods

> Methodology focused on the Context

Diagnosis

- To uncover the perceived needs
- To uncover the context of facilitating learning
- To describe the status quo on the existing tools

Techniques: Focus-groups and Face-to-face interviews and distance interviews (phone or email)

Sample: 10 interviews per partner



Focus on
Methods



Focus Groups Template

1st Level: Data on the interviewee and the description of the work tasks;

2nd Level: Definition of concepts: personal and organizational perspective of “learning” as well as the facilitators and initiators factors coming from the specific work place;

3rd Level: Best practices: collection of the best learning system, the role of formal informal and no formal learning at work place and their variables;



Focus on
Methods

> Focus Groups Template

4th Level Perceived learning needs: tools, methods and approaches to collected the learning needs and perceived barriers of learning and experiences in problem solutions;

5th Level National specific problem field.



Focus on
Results

> Information analyze and links to learning process

➤ Core Skills

There were expressed the same “core” skills for internal or external facilitators: communication skills, flexibility, knowledge about the business, leadership skills and listening skills.

➤ Scope

In initial training courses, the role of the facilitator is expressed
In the continuous training this figure can be assumed by different persons as training coordinators, trainers and training consultants.



Focus on
Results

> Information analyze and links to learning process

➤ Pre-programmed / Tailored made courses

The role of the external facilitator is not as obvious in pre-programmed training courses as it is in tailored made courses addressed to the organization needs.

➤ Investment in Human Capital

To foster the emphasis on the needs analysis and a strong knowledge of the company in terms of the investment in human capital and the relation between the business objectives, the employees empowerment with the mission and commitment with the organization results.



Focus on
Value

> Communicate the results

- Best Practices
- National Report
- Synthesis European Report



Using Needs Assessment to Drive Business Results, 5/9/2006



Plan to Drive Results and
European Trends

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Learning Objectives

> At the End of the Session...

We recognize the relationship between needs assessment, designing for results and evaluation

- We collected the gaps/specific skills/difficulties
- We analyzed the results in terms of market demand and the companies impact
- We provided inputs to improve your evaluation system



Learning Objectives



At the End of the Session...

We recognized the various methods for conducting a needs assessment

- Focused on the needs assessment
- Focused on the diagnosis
- Focused on the organizational context



Focus on
Your Plan

> Create your Plan to Drive Results!

- Step 1:** Organizational diagnosis > Target to top-level managers
- Step 2:** Individual diagnosis > Target to reach employees needs as well as the supervisors perceptions
- Step 3:** Analyze the information and share the results with the stakeholders
- Step 4:** Communicate the results to the organization and provide links to future impact and business results



Focus on
Your Plan > **European trends!**

Recognize and certificate the informal learning

Training by learning outcomes

KSC – Knowledge, Skills and Competences

European Credits > Vocational Training Mobility and
Transparence

All the methodologies and tools we just describe are
important to goal the European Trends



Using Needs Assessment to Drive Business Results, 5/9/2006



Vanda Vieira

Thanks for your attention!

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