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PROFESSIONAL TRAINING NEEDS ANALYSIS PROCEDURE (MANUAL)

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Foreword

Like any other public administration in the countries on the path of transition, the Serbian state administration is undergoing constant changes associated with reforms. New age imposes always new temptations, which requires harmonization and advanced knowledge. That means that civil servants need to keep developing their professional capacities and skills. Therefore, a training system that responds fully to training needs represents very important segment within the global system of changes.

Training is, at the first place, an investment into employees' human capital through the development of those capacities and skills that are highly needed during the work process. Due to this fact, it his very important for the newly acquired knowledge and skills to be practically used in employee's work. The success of training implementation is displayed, firstly, in the civil servants' performance and, conditionally, in the efficiency and effectiveness of the entire state administration.

Substaintial improvement of the training system, i.e. professional development of civil servants may not be reduced to some particular training courses. It requires the creation of permanent and systematic program of professional development, because only a continuous work may lead to positive changes within any established organizational system and in the state administration, as well.

The analysis of specific needs of civil servants at all organizational levels needs to be carried out and it ensures the validity of training. Defining the training needs means to do attentive survey of aims, resources, costs and other related factors, beginning from the current legislation, up to the impact of modern technologies. The main scope of such training analysis is to complete systematic research of this relevant fact – why things are the way they are and is it possible to improve them.

This Manual, written by Dr Gozdana Miglic, aims to convincing and preparing the employees involved in decision making process and activities in the area of human resources to start up their training needs analysis, by which they are going to contribute a great deal to the efficient and systematic professional development. The Professional Training Needs Analysis Procedure is another publication in a series of manuals prepared by the Project «Technical assistance for the preparation and implementation of administrative legislation – Phase 2 – Republic of Serbia» - DIAL, funded by the European Agency for Reconstruction. The implementing partner is the consortio headed by «Eurecna», Italy. The said Project is a continuation of other already completed projects funded by EAR, all of them having the same goal – the improvement of the state administration system and establishment of the new civil service system in the Republic of Serbia.

Peter Miklič
Editor

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1 | INTRODUCTION IN TRAINING NEEDS ANALYSIS WITHIN THE SERBIAN PUBLIC ADMINISTRATION

The public administration in Serbia has to adapt to an enormous number of changes in a very short time. Civil servants are faced with a constantly changing regulatory framework which needs implementation and enforcement, as well as new demands from the growing private sector and the citizenry at large. These challenges can only be met if the civil servants are highly qualified and constantly updating their qualifications. A sound system of inservice training is therefore crucial to keep the personnel within the public service on an equal footing with the rapidly changing environment.

Serbian public administration has already set up structures and procedures to assess civil servants' training needs. Usually, the needs assessment is the responsibility of each ministry or state bodies but is also the responsibility of the national central training institution (The Human Resources Management Service).

A needs assessment procedure usually draws on information from management and training recipients. To be efficient, it has to be an ongoing process in which the assessing of training measures in place plays an important role.

The Training Needs Assessment Handbook is meant to point out the determining components of training needs analysis with special emphasis on the procedure. It examines different areas associated with the consultancy aspect of training needs analysis and provides guidance on how to use them through scenarios and checklists.

The aim of the handbook is to encourage the HRD specialists in the ministries and other administrative authorities to approach training needs analysis that considers the organisational context of the training requirement, users of the training, the suitability of training to resolve the identified organisation, performance problems, needs and, lastly, readers are encouraged to conduct a selfanalysis of their individual training needs.

1.1 Legal Framework

Article 97 of the Civil Servants Act (the "Official Herald of RS", No. 79/05, 81/05–corrigendum and 83/05–corrigendum) requires state bodies to annually review organizational, occupational, and individual needs for training. A systematic and continuing review of current and foreseeable organizational training needs provides a realistic basis upon which to plan, budget, direct, and evaluate an effective training program. The training needs of individual civil servants should be assessed within the context of the organization's strategic goals to ensure employees' performance competency and development.

Training needs assessment should be tied to individuals' performance, performance of each state body and also to the Government performance.

The Human Resources Management Service should establish a strategic plan which includes specific training goals and objectives designed to move the Serbian public administration towards desired outcomes (Article 2, Regulation on Establishment of the Human Resources Management Service; the "Official Herald of RS", No. 106/05). The Human Resources Management Service thus should link strategic training planning to a systematic approach for the assessment of organizational needs and to a periodic evaluation of programs, including human resource development, to meet identified needs.

Training is appropriate when the Government can expect to gain more benefit from the training than it invests in its cost. The identified training requirements are an important factor in the total training budget forecast for the individual state bodies and public administration as a whole, and impact on the amount of funds that get allocated by the Government.

Determining the value of any particular training investment, however, must rely on the vision and judgment of line managers, supervisors and top managers. But only the training which builds skills and knowledge and helps employees better contribute to the organizational mission should be authorised.

Identifying civil servants' training needs requires careful scrutiny of mission objectives, personnel, production, resources, costs, and other factors. The employees' training or training needs might be indicated by several factors: laws and regulations, new placements and new employees, career enhancement plans, new managers, intern training plans, performance problems, modernization of equipment, new technology, managerial competency assessments, mission changes, employees' requests, reassignments, realignments, promotions, clients' demands, etc. In some cases, the need is immediate and the training remedial; in other cases, the aim is to update and maintain professional knowledge; and in still others, the goal is to prepare for requirements anticipated by higher level civil servants.

1.2 The Starting Points for Development of Permanent and Systematic Training

We can define training as the systematic modification of behaviour through learning which occurs as a result of education, training, development and planned experience.

The aim of training is to help the organisation achieve its purpose by adding value to its key resource – the people it employs. Training means investing in people to enable them to perform better and to empower them to make the best use of their natural abilities.

In practical sense it means that training should develop the employees' competences and improve their performance, help employees grow within the organisation and reduce the learning time for employees starting in new jobs on appointment, transfer or promotion, and ensure that they become fully competent as quickly and economically as possible.

Most training and development systems follow a step-by-step approach similar to this:

Analyse. The two primary purposes of this phase are to determine that the training is needed and to make certain that training is based on reliable and identified training requirements.

Design. The trainer/designer determines the strategy to be used in accomplishing the training.

Develop. The trainer develops training methods; these can include experiences, tools, and methods of delivery.

Implement/conduct. The trainer conducts the actual training.

Evaluate. The training programme is evaluated and feedback gathered for updating or revising the training design.

The five phases are ongoing activities that continue throughout the life of a training program. After building a training program, the other phases do not end once the training program is implemented. The five phases are continually repeated on a regular basis to see if further improvements can be made (Vukovič and Miglič, 2006: 90-94).

1.3 The Training Needs Analysis Phase

Training needs assessment or analysis (TNA) may be defined as the process of identifying problems that are signalled by deficiencies in compliance with standards or external requirements and that can be resolved wholly or partly by training (Goldstein, 1993: 93-100).

The main purpose of TNA is to perform a systematic exploration of the way things are and the way they should be. TNA is concerned with defining the performance gap. This is what has to be filled by training, i.e. the difference between what employees know and capable of and what they should know and be capable of.

The analysis phase is the building block of a training program. The basis for who must be trained, what must be trained, when training will occur, and where the training will take place are accomplished in this phase. The product of this phase is the foundation for all subsequent development activities (Bee and Bee, 1995: 19).

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1.4 Areas of Training Needs Analysis

TNA enables the organisation to make informed decisions regarding the level of implementation required to enable the management to reach the new business goals.

The training purpose can be achieved only if the learning needs on the different organisational levels have been systematically identified and analysed. Training needs should be analysed in the following order:

organisational (corporate) needs – for the organisation as a whole.

group needs (occupational) – for departments, teams, functions or occupations within the organisation.

individual needs – for individual employees (Stanley, 1987: 24).

These three areas are interconnected. The analysis of corporate needs will lead to the identification of training needs in different departments or occupations while those in turn will indicate the training required for individual employees.

The process also operates in reverse: as the needs of individual employees are analysed separately common needs emerge which can be dealt with on a group basis. The sum of group and individual needs will help to define organisational needs

Comprehensive TNA includes also an organisational readiness for change (Reid and Barrington, 1996; Rummler, 1987).

1.5 Training Needs Analysis Procedures

A systems approach to TNA involves a number of logical steps: problem identification, analysis, identification of training needs, the ranking of needs in order of urgency and the setting of training goals or objectives.

The handbook outlines a step-by-step process for TNA at the different organisational levels. A HRD specialist should plan on three levels: organizational, occupational and individual.

The steps outlined in the handbook include:

Step one – obtain needs assessment data (through questionnaires, surveys, advisory groups, focus groups, interviews, etc.)

Step two – analyze data (discrepancy or gap between the desired knowledge and skills and those currently possessed by the employees);

Step three – define performance problems (changing technologies, etc.);

Step four – research performance solutions (ask what other ministries and administrative authorities are doing; determine costs of training and non-training solutions; involve all affected employees);

Step five – determine best approaches to resolving problems and issues;

Step six – conduct a cost/benefit analysis or business case for selected approach to project what financial benefit will result from the investment of training funds.

Once training needs have been clearly identified, the next step is to set priorities and objectives. Consideration must be given to the relative urgency of various training needs, taking into account factors such as the frequency with which problems are likely to occur, the number of people affected and legal compliance.

Training objectives must be specific because, if they are not, evaluating whether the training has been successful will prove difficult. Specifically defined objectives also help determine the appropriate training content and delivery method. Training objectives or goals establish the results that training should achieve.

1.6 Types of Training Needs Analysis on the Organisational, Occupational (Operational) and Individual Levels

Many needs assessments are available for use in different employment contexts. Sources that can help the HRD specialist to determine which needs analysis is appropriate for the individual situation are:

Context Analysis. An analysis of the business needs or other reasons the training is desired. The important questions being answered by this analysis are who decided that training should be conducted, why a training program is seen as the recommended solution to a business problem, what the history of the organization has been with regard to employee training and other management interventions (Harrison, 1991: 97; Harrison, 1995: 145).

Analysis of Business and Human Resource Plans. The plans should indicate the types of skills and competences that may be required in the future and the numbers of people needed with those skills and competences (Stanley, 1987: 85).

Individual (User) Analysis. Analysis dealing with potential participants and instructors involved in the process. The important questions being answered by this analysis are who will receive the training and their level of existing knowledge on the subject, what are their learning styles, and who will conduct the training.

Job Analysis. Analysis examining in detail the content of jobs, the performance standards required in terms of quality and output and the knowledge, skills and competences needed (Fisher, Schoenfeldt and Shaw, 1999: 185).

Work (task) analysis. This is an analysis of the job and the requirements for performing the work. Also known as a task analysis or job analysis, this analysis seeks to specify the main duties and skill level required. This helps ensure that the training which is developed will include relevant links to the content of the job (Clardy, 1997).

Analysis of Performance Reviews. Performance management processes should be a prime source of information about individual learning and training needs. Involves performance improvement programmes, learning contracts, personal development plans emphasises continuous development and regards every contact between managers and individuals as a learning opportunity (Rummler, 1987: 242; Stanley, 1987: 85).

Content Analysis. Analysis of documents, laws, procedures used on the job. This analysis answers questions about what knowledge or information is used on this job. This information comes from manuals, documents, or regulations. It is important that the content of the training does not conflict or contradict job requirements. An experienced worker can assist (as a subject matter expert) in determining the appropriate content (Harrison, 1991: 150).

Training Suitability Analysis. Analysis of whether training is the desired solution. Training is one of several solutions to employment problems. However, it may not always be the best solution. It is important to determine if training will be effective in its usage (Lipičnik and Mežnar, 1998: 67; Reid and Barrington, 1996: 246).

Cost-Benefit Analysis. Analysis of the return on investment (ROI) of training. Effective training results in a return of value to the organization that is greater than the initial investment to produce or administer the training (Bee and Bee, 1995: 263).

1.7 Sources, Methods and Techniques for Investigating Organizational and Personal Training Needs

It is suggested to use multiple methods of TNA and do not rely on one method. It is important to get a complete picture from many sources and viewpoints.

Methods and techniques for analysing training needs depend on the scope of the assessment and on available resources. All or some of the following approaches may be used:

Interviews and observation. Interviews with representative samples of supervisors, workers and others may be used to assess attitudes and perceived problem areas; observations can be made of representative jobs to assess compliance with safe working practices.

Surveys. A survey can be used for relatively large groups to gain information about current skills and knowledge levels and about perceived training needs and problem areas as well.

Documentation review. For example, written statements of business strategy, legal requirements, organisation policies and procedures, accident statistics and workplace inspection reports can be examined to determine their bearing on training needs.

The listed methods and techniques can be supported also with questionnaires, consultation with persons in key positions, and/or with specific knowledge, focus groups, tests, work samples, records and report studies and review of relevant literature (Clardy, 1997).

2 | PREPARATION FOR TRAINING NEEDS ANALYSIS AND IMPLEMENTATION PROCEDURES

The aim of this handbook is to examine the main activities which are performed in training needs analysis together with the description of the concrete training needs analysis implementation procedure.

The second part of the handbook contains already prepared instruments and forms for data collection and processing, selection of educational strategies and drafting of corresponding training plans which may be adjusted to individual needs and situations. All instruments are presented in the same manner which is the following:

- **purpose of the instrument**
- **its description**
- **tools required for implementation**
- **data collection**
- **results analysis**

Certain instruments determine the methods of data collection and manner of their use. The advantages and potential problems are emphasised for each method.

Training needs analysis in special and large organisations or in organisational units is significant and it requires often more than one person. Thus, it is important to have associates from the very beginning.

At the very beginning it is also important to secure the support of managers and employees and general service employees, which undoubtedly have the most experience for certain tasks.

Together with them it is necessary to:
- **determine objectives and fields of training needs analysis**
- **identify target groups and approaches to that target population**
- **agree on achieving results of the analysis**

It is very important in the organisation to gain the support of persons with adequate authority, who advocate the research in training needs and may influence the opinions of those who have different opinions. Before the beginning of the analysis, the individual or the group performing an analysis must have the lawful support for implementing certain activities and guarantee for the realisation of what was established. Namely, activities related to the determination of training needs with employees raise expectations that must be met; otherwise the employees would loose trust if the planned activities would not be done except for justified reasons. This must be presented to the employees in a timely manner, and especially to those that participated in the analysis.

The preparation for analysis also includes the following:
- **drafting of the analysis implementation plan**
- **selection of certain data collection method**
- **data analysis and their interpretation**
- **reaching conclusions and recommendations**

2.1 How to Approach an Analysis?

In deciding on the needs analysis in an organisation, the initial research must be done which will answer some basic questions and they are the following:
- What is the actual purpose of the training needs analysis?
- What are the role and the status of a person or persons who will directly undertake the needs analysis? Does this refer to the employees in the organisation or outside the organisation? What are the advantages of internal and external analysts? If the analysts are external, what do they already know about the organisation or what else they have to find out?
- What do employees know about the training needs analysis?
- What types of training were organised for the employees in the previous period; what were the consequences (positive and negative experiences); which group or individuals were included in the training?

The following table may serve as the assistance in answering some of the following questions (Table 1).

Table 1: Deciding on undertaking the training needs analysis

QUESTION	NOTE
1. What is happening in the organisation which may initiate or already initiated the training needs?	
The following may be potential initiators: • *new employment* • *internal reassignments or promotions* • *reduction of number of employees* • *introduction of new systems, procedures or working methods* • *new services* • *new programme equipment* • *results demonstrating the extent of successful performance of the organisation* • *(di)satisfaction of the clients, that is users* • *requests of managers or individuals* • *preparations and training plans implementation* • *strategic decision of a manager on development of certain target groups (e.g. managing employees, employees in charge of international cooperation, international integrations).*	
2. How can you obtain information about these catalysts?	
The following are negative indicators: • *clients' complaints* • *reports on non- implemented plans* • *number of pending cases* • *number of appeals in the second instance administrative proceeding* • *delays* • *divergence from working standards* • *increase of employees' complaints* • *number of disciplinary proceedings or proceedings for identification of incompetence* • *increased number of resignations, especially of those with experience and long years of service* • *increased number of sick leaves (due to treatment in hospitals) and absence from work*	

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3. Which external influences may in future represent the catalyst for new development (training)?	
The external catalysts are for example: • new legislation • modification of existing legislation • clients' requests (users)	

4. At whom those catalysts will have the greatest influence?	
• top management • managers at the medium management level • employees responsible for HR • other employees and general service employees • certain professional groups, for example employees having a direct contact with clients, employees in finance sector, IT	Make a matrix using the Table 2. which will show the relationship between the catalyst and certain target group.

5. Where can you find information about those catalysts?	
For example: • general HR records • personal dossiers of employees • report on previous trainings • salaries • information obtained from management • reports on grading the performance of each individual • direct information from clients (users)	

6. How can you obtain information about these catalysts?	
For example: • reports, minutes • observation and interview – examine the current situation by spending time in the unit, service, etc. Record the situation and impressions about work, scope of work and specificities of work • be present at meetings of principal officers with their associates or at least read the minutes of meetings since this is also a way of reviewing someone's work • organise individual interviews with employees at all organisational levels	When you undertake the analysis several times you will be able to compare the current situation with the situations in the past and to record the differences. Record on the card (table 3.) who allocates the work, flow of work and its progress (next phase). Avoid the question "what kind of training do you need". This is the fastest way of getting the information on training needs but is may be misleading – employees do not necessarily have to feel a need for further development or to know which training is the most suitable for their situation or for them personally. Instead, it is better to determine how the units and services work, how they are included in the organisation, what are the plans for future, problems which they encounter, etc. Determine if other internal organisational units have the same or similar problems.

Table 2: Influence of catalysts on employees

	Managers of I level	Managers of II level	Managers of III level	HR specialists	Employees/ general service employees
The following may be the potential catalysts:					
• new employment • internal reassignments or promotions • reduction in the number of employees • implementation of new systems, procedures and working methods • new services • new programme equipment • results of the successful performance of the organisation • (di)satisfaction of the clients, that is users • requests of managers or individuals • preparations and training plans implementation • strategic decision of a manager on development of certain target groups (e.g. managing employees, employees in charge of international cooperation, international integration).					
Negative indicators					
• clients' complaints • reports on non-implemented plans • number of pending cases • number of appeals in the second instance administrative proceeding • delays • divergence from working standards • increase of employees' complaints • number of disciplinary proceedings or proceedings for identification of incompetence • increased number of resignations, especially of those with experience and long years of service • increased number of sick leaves (due to treatment in the hospitals) and absence from work					
External influence					
• new legislation • modification of existing legislation • clients' requests (users)					

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Table 3: Picture of the current situation (observations, interview)

Where is the job position?		What are the working phases and procedures; who is included, what is the length of time?
	Job positon title	
Who and which system support a job position?		Purpose/orientation of the job position?
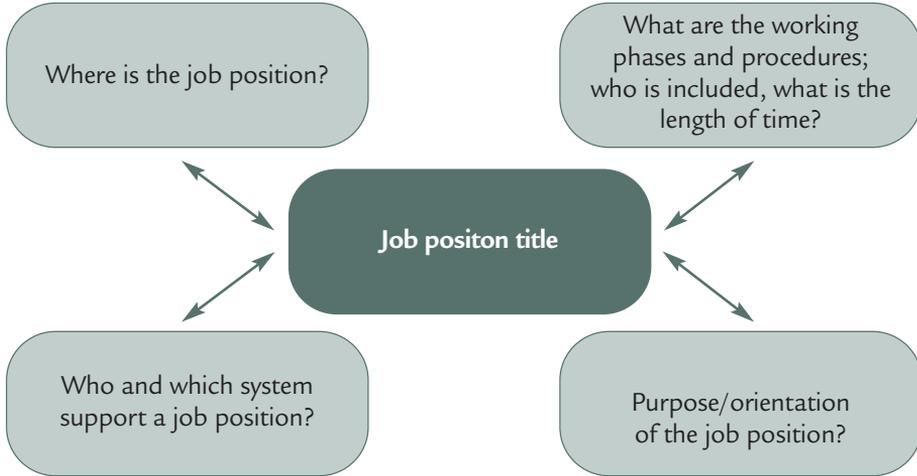
Identification of catalysts for training needs is the first step in the efficient needs analysis. The impression of what is happening in the organisation or its internal organisational, units and wider is made. However, the conclusions should not be made in this phase. By now, we estimated the indicators which direct the analysis.

If we want to make the development efficient for the organisation and individuals, we cannot do all the work alone. We have to cooperate with others and jointly do the following:

• **Define objectives and fields of training needs analysis:** regardless of the quality of completed initial preparatory periods, there are still individuals who may have significant information on the current situation and future development and also have the power and the authority to undertake the direct needs analysis, as well as the later implementation of analysis results;

• **Identify target groups and access the whole population:** everyone, although he or she may perceive development in a positive way, may understand the training as a criticism or even as a punishment. Representation of objectives of the training needs analysis requires a careful approach in order to suppress the resistance, fear or scepticism which may arise amongst employees;

• **Agree with responsible persons on the possible implementation of the results analysis:** The environment must be open and inclined to training and must encourage a higher degree of training, to recognise it and award it. The application of acquired knowledge in practice must be provided. People who may ensure this are the managers, immediate superiors to employees as well as those who will go through the training or already completed professional training. These are the target groups that are most interested in quality and efficient work.

On the basis of received information and findings we shall make a plan about the needs to be examined; which instruments we are going to be used; which combination of instruments are the most appropriate; how and which employees must be included – all this in order to get the best results.

It must be emphasised again that there should be a figure with certain authority who supports the training needs analysis and who may influence the beliefs of those who have different opinion. Before we begin the needs analysis, the person responsible for human resource training in the organisation must have all required support (the best from the top management) to implement the activities. Activities related to the training needs analysis with employees must be achievable. If the organisation commits to accept the analysis and implementation of training without the support of the authority, the damage will be greater than the benefit. **Do not start anything without formal and real support and approval.**

2.2 Use of Instruments

Sequence of using the instruments:
- **define target group**
- **decide on the method for data collection and data processing**
- **teach/inform target group about the purpose of the analysis and the chosen instrument.**

The general rule is that target groups must be followed from top to the bottom; one should bear in mind that that the target group represents an adequate source of information, opinions, positions about certain fields included in the analysis. The matrix No. 4. is an example for this.

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Table 4: Order of target groups

Field (cases)	Persons at the top of the organisation	Persons leading others	Persons that are not leading others (other employees and general service employees)
• *understanding of the organisation and its role in the social environment*	X		
• *criteria of organisation's success*	X		
• *definition of the quality in the organisation*	X		
• *clients' satisfaction*	X	X	
• *communication*	X	X	X
• *satisfaction from working*		X	X
• *implementation skills*		X	
• *human resource management*		X	
• *financial planning*	X	X	
• *job analysis*		X	X
• *overview of training needs of employees*		X	X
• *working with others (team work)*		X	X
• *overview of expert knowledge and skills*		X	X

When you meet your target group, you must decide how to use the chosen means within the group. Whenever it is possible the best method is to use a personal approach, namely an interview. It stimulates trust and openness which provides a better quality in data collection. Unfortunately, this manner may not be always used (for example, a great number of employees, time required for undertaking the analysis, space, target groups).

Measure the possibilities and choose the method that is most appropriate to your demands (size of the target groups, time, costs…).

When deciding about the type of the instrument and its appropriateness the report (Table 5.) is made at the same time. This report will be a support for you in collecting the instruments in subsequent phases.

Table 5: Minutes on using instruments

Type of the instrument	Target group	Number of included people	Response rate	Quality of collected information
Interview	Principal officer of unit	52	86 %	very biased
Questionnaire	Principal officer of unit	52	46 %	incomplete, further checking required

You may alter to some extent the suggested methods and in the following manner:
 • **Survey sent by post** – the internal mailing system may be used, such as the one that is used in the organisation (for example, email or fax);

 • **Individual meetings** – if certain individuals are not easily accessible, you may send them the materials by post and then call them by phone and talk to them;
 • **Interview** – you may write questions and you can get written answers (written survey).

When you complete all presented activities, you should prepare the group for the implementation of instruments. The best way is to do so directly since you can clarify the unclear issues and eliminate the fear and prejudices that may rise with some of the participants primarily due to their fear of the consequences.

In order to overcome the possible obstacles, you should have time to explain to people why and how activities will take place. You should secure their support and participation (Table 6).

Table 6: Topics that have to be presented to the group at the first meeting

Content	Note
• *represent training needs analysis – purpose, objectives* • *examine previous experiences of the group in relation to training needs analysis* • *explain the background of the training needs analysis* • *explain the role of the group* • *emphasise why the analysis is required* • *emphasise the positive sides of the attitudes* • *represent the instrument* • *represent your expectations* • *make time for questions* • *present how you are going to use obtained information* • *once more emphasise the important effects for the organisation or the internal organisational unit* • *check if people understood what is expected from them* • *represent further steps* • *give a copy of the instrument to each person*	

After gathering the experiences concerning the use of different means, it will be easier for you to decide on the adequacy of instruments for certain situations (included employees, types of problems, objectives of analysis, etc). In choosing the instruments one should respect the characteristics of the organisation, tradition, organisational culture, practice and experiences (for example, the written communication – interview or the written communication, namely survey).

One should always bear in mind the type of the organisation in which the analysis is made and also one should secure conditions for better success. Employees, especially managers should be prepared for activities that they are not used to.

2.3 Results Analysis

Following the data collection it is necessary to analyse the data. For a start, we should think about the following questions:

1. How do we plan to use the information?
• to establish general training needs in the whole organisation or in particular organisational units;
• to define specific fields of training within the wider field of determining training needs;
• for making the training programme;
• for making training plans;

2. For whom is this information intended?
• only for the needs of human resources units, that is human resources specialist responsible for professional training;
• for managing employees at all organisational levels;
• for the top managers;
• for the institution organising and implementing the training.

3. How complex an analysis do we expect?
• very precise analysis supported with statistical data, graphs and tables;
• only a general overview.

Information received following the use of instruments may be used or presented through the two types of analyses or by using a combination of the two types:

Substantial analysis – form a matrix of answers to questions within the instruments and identify the topics that emerge;

Numerical analyses – count the frequencies (intensity of answers), calculate the average and make comparison in order to be able to identify the trends and priority actions.

Several suggestions concerning the instruments appropriate for certain types of analysis are given in the table 7.

Table 7: Appropriateness of certain instruments in relation to certain type of analysis

Instrument	Substantial analysis	Numerical analysis	Combined analysis
• *Satisfaction of participants*		X	
• *Satisfaction of employees*		X	
• *Communication*	X		
• *Implementation skills*		X	
• *Human resource management*	X		
• *Working analysis*		X	
• *Overview of training needs*			X
• *Working competencies*		X	
• *Working with others (communication)*		X	
• *Overview of expert knowledge and skills*		X	

2.4 Educational Strategies

Following the identification of knowledge and skills included in the training, the decision-making about the most efficient manner for satisfying determined needs is the next step.

There are several possibilities from which one is chosen depending on what is the most suitable for the particular situation. Table 8 represents the most frequently used educational strategies or method.

Whether the individuals who should train and guide the activities of others (for example mentors) themselves master the required skills and whether they are trained to teach others is the question that is always present in choosing the first two educational strategies.

In preparing the training plans a person should always have in mind all received information and training needs. The most adequate ways for acquiring knowledge that is educational strategy should also be determined.

Table 8: Most frequent educational strategies, adjusted to training of employees

Possibilities	Advantages	Weaknesses
On-the job-training	• *learning at work* • *enable recording* • *useful for learning skills* • *low costs*	• *obstacles in work* • *capacities and knowledge of a person teaching* • *possibility of transferring bad habits and mistakes*
On-the job-coaching	• *learning at work* • *adjusted to specific relationships* • *individuals solve actual problems* • *may be used for management skills development* • *low costs*	• *obstacles in work* • *capacities and knowledge of a person teaching* • *possibility of transferring bad habits and mistakes*
Courses outside work	• *individuals and groups exchange knowledge and experiences* • *useful to obtain professional knowledge*	• *absence form work* • *unrealistic environment* • *very costly*
Individual learning	• *learning at his or her own pace* • *as addition to other methods*	• *requires great self-initiative and self-discipline* • *may not be targeted to adequate knowledge and skills* • *time consuming*

2.5 Report Drafting

Following the completed training needs analysis, gathered results should always be presented. This is usually done in the form of a report which may be added by presentation to individuals or to target groups – for example, participants of the analysis and their superiors.

It is important that the reports are clear, precise and brief. A report must always contain the following elements:

- **table of contents**
- **abstract**
- **introduction**
- **presentation of the methodology**
- **data analysis**
- **determined facts and conclusions**
- **recommendations**
- **annexes.**

Several tables that may be used for presenting information are given further in the text.

Table 9 shows the ways in which the human resources specialist, responsible for professional training recorded the existing training of employees.

Table 9: Set of information on completed training of employees

Name and surname	Organisational unit	Performed training (seminars, course ...)	Used educational strategy
xxxx	Division for ...	xxxx	Course outside work
xxxx	Service ...	xxxx	Internal development (training) under the mentor's guidance (name and surname)

One of the possible forms of collectively determined training needs is presented in the table 10, while a similar plan for the development of organisational unit and individuals is given in the table 11.

Table 10: List of training needs (training needs – an example)

Job position	Required development (training)
Principal Officer of the unit	• *Mutual relations and understanding*
	• *Negotiation skills*
	• *Organisation and chairing of meetings*
	• *Financial planning and project monitoring*
Secretary of the Principal Officer of the unit	• *Rules of office management*
	• *Business communication and protocols for secretaries*
	• *Official language at work*
	• *English language for secretaries*
Senior Counsellor	• *Rules of office management*
	• *General administrative proceeding*
	• *Client relationship skills*
	• *Computer literacy – Excel*

Table 11: Overview of the form for planning the training in the organisational unit and for individuals

Name of the employee / job position	Aim of training	Educational strategy / method	Costs	Deadline	Institution organising the training
Principal Officer of the unit	*Increase management capacities and human resource management*	*Two days seminar (outside work)*	*Tuition fee, allowances, travel costs, accommodation.*	*Month/Year*	*Centre for development of managers*
Secretary of the Principal Officer of the unit	*Learn the basis of business communication in the English language*	*80 hours course (outside work)*	*Tuition fee*	*Month/Year*	*Foreign language centre*

2.6 Summary of Preparations and Training Needs Analysis Implementation

Summary of key steps of training needs analysis:
1. Determined objectives of the analysis and implementation and implementation plan timetable.
2. Provide approval and needs of the management, namely the responsible people in the organisation
3. Examine the history of professional development in the organisation or in the organisational unit in which the analysis will be undertaken
4. Examine the current situation and indicators influencing the development needs; include other people (for example, employees who are experts for certain working areas) and provide support of the management
5. Determine the target group
6. Choose a corresponding instrument or the combination of several instruments
7. Present objectives of the analysis to the target group and provide it with guidelines concerning the use of instruments
8. Use the instrument
9. Analyse collected data
10. Make report, present the facts and give recommendations
11. Complete the development plan which includes individuals and certain target groups that require training, type of training, duration, educational methods, strategies, detailed estimation of costs to be proposed to the organisation which will undertake the training (table 11).

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3 | INSTRUMENTS

3.1 Analysis of Working Capabilities

Purpose

The means intended for all working methods with the accent on required knowledge, practical skills and behaviour are outlined further in the text.

They are intended to determine if the agreed standards of the success of work are achieved; if there are differences and if so which – between the aspired for and the existing situation; whether those differences are the consequences of a lack of knowledge, experiences and inadequate behaviour.

The analysis of working skills consists of four main elements:
• Description of work and employees' characteristics (I)
• Overview of training needs (III)
• Capacity to perform tasks / work (IV)
• Capacity to work with people (mutual relations, understanding) (V).

The target group for the analysis of working capacities usually consists of all employees including the top management, although for the latter group it is recommended to use the personal assessment in estimating training needs (IV).

Job analysis is a basis for further analysis and enables managers and their associates to determine the content of each task and the result of this analysis is the **job description and the description of employees' characteristics.**

Overview of training needs encourages employees to undertake responsibility, determination and estimation of personal training needs.

Training for performance of tasks provides the basis for the overview of capacities of employees in the unit responsible for development planning. It also determines the levels of skills and the knowledge employees have and their level of adjustment required for performing different tasks.

Capacity to work with people is used to analyse training needs in the fields of verbal communication.

The analysis of working capacity is usually within the competence of those who organise and implement development but it can also be done by the organisation itself.

The success of development analysis depends on preparations, which are very important, especially if the analyst is not employed in the organisation.

In preparing the analysis it is recommended to follow the given guidelines and to answer the questions "did we...?"

Preparations Did we...	yes	no	activities
...determine the training contractor and did we get his or her consent and support?			
...precisely determine objectives to be achieved with the training needs analysis?			
...anticipate and estimate possible problems in the implementation of analytical means in chosen target groups; did we adjust the tools to the specificities of certain target group and its requests?			
...agree with the training contractor and managers in the organisation on their expectations?			
... clarify our role of analyst? If the analyst is – a moderator or the counsellor? – the analyst autonomously undertakes the entire analysis?			
...choose the optimal data collection method?			
... prepare the presentation on purposes and objectives of the training needs analysis and target group which will be used to undertake the training needs analysis.			

3.2 Description of Work and Employees' Characteristics (1)

Purpose

Clarify purpose and working objective.

Analyse knowledge, practical skills and behaviour which an employee should have in order to efficiently perform his or her work.

Determine standards which are the basis for estimating success of each individual.

Description of means

Means are general forms that provide simple but consistent methods of analysing work and making the job description. The filled form may be used independently or in combination with other instruments intended for the determination of training needs.

Analysis "people – information – tools"

Tasks are often differentiated in relation to time allocated to working with people, information and tools. Although most employees deal with all these elements into their work, usually one is dominant. Allocation of working duties in three aforementioned

categories provides information on the significance of certain fields for a concrete job position and emphasises the most important roles of employees. The analysis also gives information of the most important competences related to certain job positions, as well as to knowledge skills, and attitudes required for efficient of exercise of the role.

Material

Form I-1 – description of work and analysis "people – information – tools"
Form I-2 a-c – analysis of collected data

Data collection method

Methods	Advantages	Possible problems
1. Managers autonomously undertake the analysis for all tasks that are performed in their unit.	• it is very easy to do	• limited information on tasks that really emerge in the unit
2. The analyst shall undertake analysis on the basis of interviews with employees who have experience and their immediate superiors (principal officers).	• entirety of the analysis • possibility to compare understating of each job content • consistency in the whole organisation	• more time is necessary for gathering information
3. Manager and the most experienced employees of the unit perform the analysis autonomously.	• possibility of comparing presumptions on working content with actual activities that are undertaken in performing a particular job • entirety of the analysis • "sense of participation in the analysis" and confidence in the findings of the analysis	• disturbance of working process

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Methods

Managers autonomously perform analysis of tasks in their units
1. Familiarising the participants of the target groups that are the subject groups of the analysis with the importance of the analysis and the used instruments.
2. Preparing a sufficient number of forms I-1 (description of tasks) and deciding on the time limit for filling in and returning the forms.
3. Current checking and revising the content of certain tasks as the basis for future training needs analysis.

Interviews of analysts (for example, employees responsible for HR) with experienced employees and their immediate superiors

1. Familiarising the participants of groups which are subject of the analysis with the importance of the analysis and the used instruments.
2. Preparation of meetings with the participants of the analysis.
3. Discussions about the content and job requirements, as well as entering the information in the form I-1.
4. Overview of the results of entire analysis and possible additions made by the analyst and the principal officer of the unit in which the analysis was undertaken.
5. The Principal Officer of the unit shall agree with employees participating in the analysis about the results and will secure their approval or the confirmation for established findings.
6. Current checking and revising the content of certain tasks as the basis for future training needs analysis.

Manager and most experienced employees of the unit will autonomously perform analysis of work

1. Familiarising the participants of groups which are subject of the analysis with the importance of the analysis and the used instruments.
2. Preparing a sufficient number of forms I-1 for participants of the analysis and preparation of timetable of meetings. Agreement on the time limit for implementation of the analysis.
3. Current checking and revising the content of certain tasks as the basis for future training needs analysis.

Results analysis

Type of analysis: numerical

Further analysis of the form I-1 is not necessary, although maybe there is justification to compare it with determined capacities for performing certain tasks (form IV-3) which secures the inclusion of all tasks performed in the unit.

It is also recommended to simultaneously determine knowledge, practical skills and behaviours that are may be common for several units, namely in the whole organisation. The aim of this added analysis is to form a key training focal point which would relate to satisfaction of joint training needs of all or at least a majority of employees in the organisation. The form I-2-a-c was made for that purpose and the data are entered in this form depending on the frequency of fields that are given in answers. In drafting the training programme the advantage is given to topics that are most frequent in answers.

Form I-1 – Job description for the purpose of determining training needs

JOB DESCRIPTION AND CHARACTERISTICS OF AN EMPLOYEE (for the purpose of determining training needs)		
1. State authority:		
2. Organisational unit:		
3. Title of the job position:	**4. Managerial job position:** YES NO	
5. Immediately superior job position:		
6. Immediately subordinate job position:		
	Title of the job position:	Number of employees (subordinate employees):
	1.	
	2.	
	3.	
Total number		
7. Cooperation with other job positions within the organisation		
	Name:	
	1.	
	2.	
	3.	
8. Brief job description:		
9. Job tasks:		

Tasks related to:		% of time:
Working tools		
Information		
People		

10. Characteristics of an employee for the training needs:	
Required education (level and option)	
Required experience (duration, field)	
Required knowledge (what a person must know and understand)	1. .... 2. .... 3. .... 4. .... 5. .... 6. ....
Required practical skills (what a person must know to do, present ...)	1. .... 2. .... 3. .... 4. .... 5. .... 6. ....
Necessity of specific way of communicating (how a person must behave in contact with other people – associates, parties ...)	1. .... 2. .... 3. .... 4. .... 5. .... 6. ....

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Form I-2 a – Shared knowledge for several job tasks

Knowledge	How many times it arose?
1.	
2.	
3.	
4.	

Shared knowledge that emerges with several job tasks (order in accordance with the intensity of emergence)
1. 2. 3. 4.

Form I-2 b – Shared practical skills for several job tasks

Practical skills:	How many times they arose?
1.	
2.	
3.	
4.	

Practical skills that emerge with several job tasks (order in accordance with the intensity of emergence)
1. 2. 3. 4.

Form I-2 c – Shared Behaviour for several job tasks

Behaviour:	How many times it arose?
1.	
2.	
3.	
4.	

Behaviour that emerges with several job tasks (order in accordance with the intensity of emergence)
1. 2. 3. 4.

3.3 Analysis of Basic Competences (II)

Purpose

Information about the training needs deriving from certain competences related to particular job positions should be obtained from the managers of internal organisational units and specialist for certain working fields.

Make a training plan.

Determine topics/training content which is common for several organisational units.

Description of instruments

Questionnaire used by specialists to determine certain competences and knowledge, skills and attitudes.

Results may be used in relation to the determination of capacities for performance of tasks (form IV-3) as the assistance in changing attitudes and the relationship of employees towards training.

Material

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Form II – overview of basic competences and related knowledge, skill and capacities

Data collection method

Methods	Advantages	Possible problems
1. *Managers autonomously undertake the analysis for all tasks that are performed in their unit.*	• *it is very easy to do*	• *limited information on tasks that actually emerge in the unit*
2. *The analyst shall undertake analysis on the basis of the interviews with employees who have experience, and their immediate superiors (principal officers).*	• *entirety of the analysis* • *possibility to compare understating of each job content* • *consistency in the whole organisation*	• *more time is necessary for gathering information*
3. *Manager and the most experienced employees of the unit perform the analysis autonomously.*	• *possibility to compare presumptions on working content with actual activities that are undertaken in performing particular job* • *entirety of the analysis* • *"sense of participation in the analysis" and confidence in the findings of the analysis*	• *disturbance of working process*

Methods

Manager of the unit autonomously perform working analysis
1. Familiarising the participants of the target groups which are the subject groups of the analysis with the importance of the analysis and the used instruments.
2. Preparing a sufficient number of forms II (lists of competences) and deciding on the time limit for filling in and returning the forms.
3. Current checking and revising the content of certain tasks as the basis for future training needs analysis.

Interviews of analysts (for example employees responsible for HR) with experienced employees and their immediate superiors
1. Familiarising the participants of the target groups who are the subject groups of the analysis with the importance of the analysis and the used instruments.
2. Preparation of meetings with the participants of the analysis.
3. Discussions about the content and job requirements, as well as entering the information in the form II.
4. Overview of the results of the entire analysis and possible additions made by the analyst and the principal officer of the unit in which the analysis was undertaken.
5. The Principal Officer of the unit shall agree with employees participating in the analysis about the results and will secure their approval or confirmation for established findings.
6. Current checking and revising the content of certain tasks as the basis for future training needs analysis.

Managers and the most experienced employees of the unit autonomously perform analysis of work
1. Familiarising the participants of the subject groups of the analysis with the importance of the analysis and the used instruments.
2. Preparing a sufficient number of forms II for participants of the analysis and preparation of the timetable of meetings. Agreement on the time limit for the implementation of the analysis.
3. Current checking and revising the content of certain tasks as the basis for future training needs analysis.

Results analysis

Type of analysis: numerical
Determine the order of importance according the frequency by using determined knowledge, skills and attitudes. Knowledge, skills and behaviour that are most frequent have the advantage in drafting the development plans.

Form II – Overview of basic competences related to knowledge, skill and behaviour

Competences	Field of knowledge, skills and behaviours				
	knowledge I	knowledge II	skills I	skills II	behaviour I
1.	x	x	x		
2.		x	x		
3.		x	x		
4.	x		x		
...					
10.					

3.4 Overview of Training Needs (III)

Purpose

The information on training needs should be obtained from employees, bearing in mind their working results. Results of the overview are just additions to facts gathered by other methods.

Make a training plan.

Determine topics/training content which is common for several organisational units.

Evaluate and adjust attitudes towards training.

Description of instruments

The questionnaire that is used by employees to specify training that they believed is necessary in the following categories of knowledge and practical skills: technical knowledge, personal capacities, level of information.

Results may be used in relation to determining capacities for performance of work (form IV-3) and as the assistance in changing attitudes and the relationship of employees towards training.

Material

Form III-1 – overview of training needs

Form III-2 – analysis of collected data

Data collection method

Methods	Advantages	Possible problems
1. *Distribution of questionnaires to employees by post.*	• *easy to do*	• *less responsive* • *needs additional stimulating of employees to have their questionnaires completed and given back*
2. *Individual interviews with employees in the unit.*	• *possibility to provide direct clarifications; increased reliability of the determined training needs; employees are more supportive of training*	• *requires a lot of time; disturbs working process; analyst may exert influence to interviewees*
3. *Interviews by telephone.*	• *rapid gathering of information; possibility to check comprehension (whether questions made by analyst are understood correctly); mMore responsive*	• *may be interpreted as impersonal analytical method; significant time consumption, in particular, if interviewees are beyond reach by phone*

Methods

Distribution of questionnaires to employees by post

1. Familiarising the participants of the target groups which are the subject groups of the analysis with the importance of the analysis and the used instruments.
2. Preparing a sufficient number of forms III-1 (overview of training needs) and agreement on the time limit for returning the filed form.
3. Preparation of set of answers based on returned questionnaires for each unit individually.
4. Forwarding the sets of answers to principal officers of the units for possible modifications and agreement on the plan of further activities.
5. The analysis of set of answers individually for each unit, determination of topics/contents, drafting of training plan and its presentation to the principal officers of the unit which participated in the analysis.

Individual interviews with employees in the unit

1. Familiarising the participants of groups which are subject of the analysis with the importance of the analysis and the used instruments.
2. Separate individual interviews which last around half and hour and concern questions from the form III-1; the answers are entered in the same form.

Steps 3, 4 and 5 are the same as in the previous method.

Interviews by telephone

1. Familiarising the participants of the subject groups of the analysis with the importance of the analysis and the used instruments; distribution of forms III-1 to employees included in the analysis. Agreement on the most convenient time for the analyst to call the interviewee. The interview should last around 20 minutes.
2. Before each interview, the analyst prepares the form III-1 for writing down the answers.
3. Interviewees respond to questions in the order given in the form.
4. Following the filling of each part of the form (technical training, training concerning personal capabilities and information process), the analyst shall read marked answers and verify if the interviewee understands them.
5. Drafting the series of answers on the basis of returned questionnaire, individually for each unit.
6. Submission of series of answers to the principal officers of the units, possible modification and agreement on subsequent activities plan.
7. Analysis of series of answers for each unit, determination of joint topics/content, drafting of training plans and their presentation to the principal officers of the unit who participated in the analysis.

Results analysis

Type of the analysis: combination of quantitative (content of the analysis) and quantative data (numerical analysis).

Numerical analysis enables the drafting of a series of answers of the whole unit; it determines the intensity of certain types of training in interviewees responses.

Substantial analysis enables connection of the presented topic/content and enables explanation of specification of particular training by interviewees.

The form III-2 is intended for recording and analysing of data.

The analysis may be extended to several units or to all units in the organisation. The form III-2 is adjusted to that aim.

Form III-1 – Overview of training needs

Which training (development) will assist a person to be more efficient?

Please answer the questions in a way to describe in detail the type of professional training that is most adequate for each category. Also, enumerate when and how training would be beneficial for you.

Name and surname of the interviewer:	Job title:
Unit:	Performance date:

Technical training, in accordance with tasks performed in his or her work:
This training would be beneficial in the following way:
Personal capabilities concerning the relationship a person has with people at his or her work:
This training would be beneficial in the following way:
Information a person needs to be acquainted in a timely manner with the training and changes in his or her working area and information that influences the quality of her or his work:
This training would be beneficial in the following way:

Form III-2 – Sum of data and their analysis

Training	How many times it was chosen?	General/joint benefits from training
Technical training		
Training in the field of personal capacities		
Information		

3.5 Capacity of Employees to Perform Tasks (IV)

Purpose

Determine differences between the real and expected level of mastering the capabilities/skills by employees.

Present possible problems and lack of adjustments regarding the scope and division of work in units.

Description of instruments

Table in which all tasks performed in a unit are enumerated, as well as a division of employees according to their capacities to perform particular tasks.

Individual training needs are marked for each job performed by each employee individually.

Instruments may be used for examining the training needs (forms III-1 and III-2). Training plans are results that were approved by the principal officer of the unit and employees.

Material

Form IV-1 – list of tasks
Form IV-2 – link between tasks and knowledge and capacities
Form IV-3 – capacity of employees to perform work

Data collection method

Methods		Advantages	Possible problems
1.	*A managers fills the table, reports on determined training needs and suggests adequate responsibilities.*	• *easy to do*	• *employees are not included; employees less supportive of training*
2.	*The analyst and principal officer of the unit fill the table; determine training needs and suggest measures.*	• *enables prioritisation of training needs and decision-making on types of measures/activities*	• *employees are not included; employees less supportive of training*
3.	*Principal officer of the unit and the employee together fill the table; determine training needs and suggest measures.*	• *dialogue between the leader and the employee* • *approval of the manager and the employee on needs and measures, joint commitment to decisions which concern training*	• *disturbances in the working process*

Methods

The principal officers of the unit autonomously fill the form

1. Familiarising the participants of the subject groups of the analysis with the importance of the analysis and the used instruments.
2. Preparing a sufficient number of forms IV-1-3, their submission to the managers and employees and verification if the aforementioned understood the forms. It should be explained that training needs in the form IV-3 may be seen in the horizontal rows, while the scope and types of certain tasks and their allocation may be seen from vertical columns.
3. Agreement on time for filling determined training needs which is complemented with the analyst proposal of future activities plan. Agreement on the time to be spent for the completion and intermediation of the determined training needs, complemented by a draft plan of analyst's prospective activities.
4. Adjustment of determined training needs with planned activities.

Principal Officers and the analyst fill the form

1. Familiarising the participants of groups which are subject of the analysis with the importance of the analysis and the used instruments.
2. Agreement on time and place of the meeting; a meeting should last approximately an hour.
3. Filling of the form IV-1-3, determination of the training needs and designation of required measures/activities.

The principal officers of the unit and the employees fill the form

1. Familiarising the participants of the target groups which are the subject groups of the analysis with the importance of the analysis and the used instruments.
2. Preparing a sufficient number of forms IV-1-3, their submission to the mangers and verifying if they understood the submitted forms. It should be explained that training needs in the form IV-3 may be seen in the horizontal rows, while the scope and types of certain tasks and their allocation may be seen from vertical columns.
3. Agreement on time for filling determined training needs which is complemented with the analyst proposal of future activities plan. Agreement on the time to be spent for the completion and intermediation of the determined training needs, complemented by a draft plan of analyst's prospective activities.
4. Filling of the form IV-3, designation of the training needs and designation of required measures/activities.

Results analysis

Type of analysis: numerical

Determining the frequency of tasks that emerge and training needs and determining the advantages.

In determining training needs it is recommended to complement it with the description of tasks (form I-1), that is with the content of certain tasks which facilitates the decision-making on the most adequate training.

Obtained information may be used in different ways depending on the organisational needs, for example:

- Determination of tasks that may be performed without supervision by a small number of employees;
- Identifying the employees who would extend their experiences through other tasks in the organisational unit;
- Identifying the employees who are well capable of training others (for example associates);
- Determination of potential needs for employing new staff;
- Assistance in drafting the staffing table which will become vacant due to the departure of an employee (for example, retirement, promotion).

Form IV-1 – List of tasks

List of tasks	Job positions			
	I.	II.	III.	IV.
task 1				
task 2				
task 3				
task 4				
task 5				
task 6				
task 7				
task 8				
task 9				
task 10				

Form IV-2 – Connecting tasks with knowledge and skills

Job position:		
Tasks	**Subtasks**	**Required knowledge, skills**
task 1	subtask 1/1	
	subtask 2/1	
	subtask 3/1	
task 2	subtask 1/2	
	subtask 2/2	
	subtask 3/2	
task 3	subtask 1/3	
	subtask 2/3	
	subtask 3/3	

Form IV-3 – Capacity to Perform Tasks

INTERNAL ORGANISATIONAL UNIT : ....

Value scale:
0 – an employee does not have any working experience
1 – an employee is trained for the job
2 – an employee may work independently without supervision
3 – an employee may train others for that task

Name of the employee	ALL TASKS PERFORMED IN THE INTERNAL ORGANISATIONAL UNIT										Activity									
	task 1	task 2	task 3	task 4	task 5	task 6	task 7	task 8	task 9	task 10										
1																				
2																				
3																				
4																				
5																				
6																				
7																				
8																				
9																				
10																				
11																				
Required activities? YES/NO																				

3.6 Capacity to Work with Others – Mutual Relationships, Communication (V)

Purpose

Determine ways of improving mutual relations which will influence working efficiency.

Description of instruments

Set of cards which describe the forms of communication between employees at different levels as the basis of complex interviews with employees.

Material

Form V-1 (with whom do we communicate) and form V-3 (summary of the interview)
Form V-2 – cards
Form V-4 – analysis of determined facts

Data collection methods

Methods	Advantages	Possible problem
1. *Individual interviews*	• *detailed analysis of training needs*	• *time consuming*

Method

Individual interview
1. Familiarising the participants of groups which are subject of the analysis with the importance of the analysis and the used instruments.
2. Agreement on the timetable of meetings with certain individuals (the interview should by rule last at least an hour). Prepare a sufficient number of forms V-1 (with whom do I cooperate) and V-3 (summary of the interview), as well as the set of cards (form V-2).
3. In the interview an interviewee should indicate persons with whom he or she interacts professionally; to write down their names and positions and to enter these data in the form V-1.
4. A person should answer all three questions from the form V-1 through answers written in the cards (form V-2).
5. The most important information obtained in the interview shall be entered in the form V-3; copy of the form shall be given to an interviewee at the and of the meeting.

6. Repetition of steps 3, 4 and 5 before the completion of all planned conversations. On the basis of his or her minutes (form V-3) the analyst shall prepare plan of measures/activities and shall forward feedback information and determine facts to all participants of the conversation and their superiors.

Results analysis

Type of the analysis: numerical
The form V-4 is used to determine the number of employees who need training.
A sign (for example X) is entered for each employee in the corresponding columns and they denote the individual training needs.
The order of priority training is planned on the basis of persons requiring similar training.

Form V-1 – With whom do I cooperate?

With whom do I cooperate?
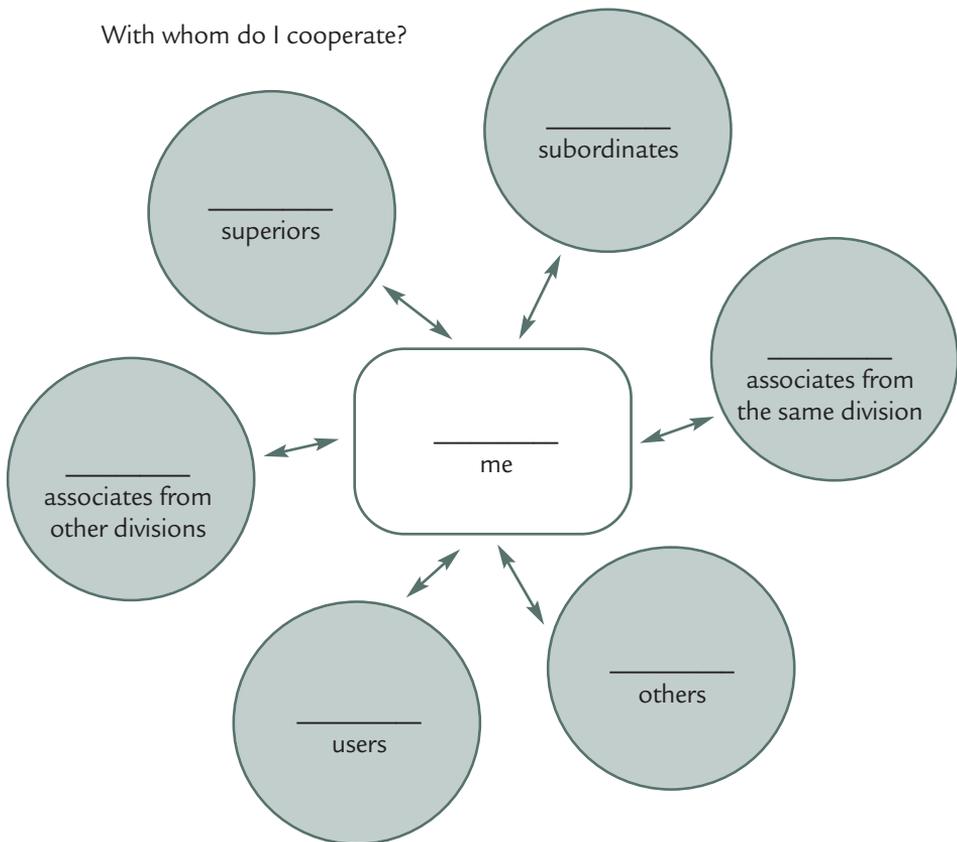
Write down names and positions of each person you cooperate with in your work. If it concerns users mark their typical characteristics (for example, age, sex, issues relevant to the relationship).

Relationship with each person with whom you cooperate mark with cards describing certain aspects of understanding among people by using the following questions:
When do I do that?
In which way do I do that?
What do I have to do in order to improve my behaviour?

Form V-2 – card: The most common aspects of the mutual communication at work

PERSUASION	INFLUENCING	REACHING AGREEMENT
RECEIVING INFORMATION	PROVIDING INFORMATION	REFUSAL
DISAGREEMENT	INITIATIVE	LISTENING
QUESTIONING	GIVING VIEWS CONCERNING A PROBLEM	SEEKING EXPLANATION

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Form V-3 – Summary of the interview

Summary of the interview with _____ (name and surname)
_____ (organisational unit)

Person	Required improvement	Measure/activities
Superior		
Subordinate		
Associates within the same unit		
Associates from the other unit		
Users		
Other (enter information)		

Form V-4 – Established training needs

Name	persua-sion	influ-encing	Reaching agreement	receiving information	Providing information	refusal / removal	dis-agreement	initiative	listening	ques-tioning	Representa-tion of the problem	Seeking explanation
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												
13												
14												
Total												

3.7 Personal Estimation of Training Needs (VI)

Purpose

To determine how much time was spent to implement key and leading activities and the estimation of the extent to which the desired results were achieved. The analysis of information shall demonstrate the fields in which there is a need for training in order to achieve organisational and individual objectives as well as the objectives of the unit.

Description of instruments

Agenda of activities and the form for data analysis.

Material

Form VI-1 – agenda of activities
Form VI-2 – analysis agenda of activities

Data collection method

Metode	Prednosti	Mogući problemi
1. *Agenda of activities is filled individually and it is followed by the interview by which the analysis is completed.*	• *easy to do* • *a person who fills the agenda has a feeling of belonging* • *minimal obstacle to daily work and routine*	• *analysis is time consuming*
2. *Agenda of activities is filled individually followed by the interview on determined facts.*	• *easy to do* • *the user completely supervises the process of filling the agenda* • *(it is the part of personal training activities) it is by itself the training activity*	• *Elicit sense of empathy with the person filling the agenda.*

Methods

Individual filling of the agenda of activities, followed by the interview which is used for data analysis
1. Familiarising the participants of the subject groups of the analysis with the importance of the analysis and the used instruments.
2. Preparing a sufficient number of forms IV-1 (agenda of activities) and the agreement on the time limit for filling the forms;
3. Organisation and realisation of interviews with each individual. The aim of the interview is to confirm the training needs of a person VI-2 (analysis of the agenda of activities). The form VI-2 is filled at the end of the interview which includes the training needs of a person.

Individual filling of agenda of activities and its individual analysis, followed by the interview concerning findings
1. Familiarising the participants of the subject groups of the analysis with the importance of the analysis and the used instruments.

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2. Preparing a sufficient number of forms IV-1 (agenda of activities) and the agreement on the time limit for filling the forms;
3. Organisation and conduct of interviews with each individual. The aim of the interview is to confirm the training needs of each person. The basis of the interview is the VI-2 (analysis of the agenda of activities). At the end of the conservation, the form VI-2 is filled out which includes the training needs of individuals.

Results analysis

Type of the analysis: numerical

The analysis of the results is intended for determining those activities which an individual frequently performs, although the quality is not satisfactory and the further development is required.

These are the most probable advantages of the training needs.

The next level of training needs are those activities that an individual performs from time to time and whose quality is not satisfactory.

The following are the activities that an individual never performs, although they represent the activity of management.

The individual training plan is drafted on the basis of training advantages determined in this manner.

Form VI-1 – Agenda of activities

The activities during the working hours are entered in the table. In order to determine how much time a person needs for certain activities, mark with the sign (/) every 15 minutes you spend for the activity that is most similar to the description given in the table. At the end of each day gather all the signs for particular activities and covert them in spent time.

Activity	1st day	2nd day	3rd day	4th day	5th day
Maintenance and improvement the quality of work of the organisation, unit...					
Encouraging changes of current working methods					
Monitoring and supervision of resources (of finances, time ..., and not of employees)					
Obtaining and choosing employees					
Care for training of employees, including personal development					
Allocation of tasks and monitoring of results					
Developing of quality business relationship					
Getting information, information analysis and forwarding					
Solving problems and decision-making					
Others (describe in detail)					
TOTAL					

Form VI-2 – Analysis of the agenda of activities – determination of training needs

On the basis of information from the agenda of activities determine and mark with the sign (X) how often a person performs certain activity (often, from time to time, never) and estimate the quality of performance (excellent, appropriate, inadequate – training needs). For each category, namely activity, there will be two signs.

Activity	Intensity of performance			Quality of performance		
	intense	from time to time	never	excellent	appropriate	unsatis-factory
Maintenance and improvement the quality of work of the organisation, unit…						
Encouraging changes of current working methods						
Monitoring and supervision of resources (of finances, time …, and not of employees)						
Obtaining and choosing employees						
Care for training of employees, including personal development						
Allocation of tasks and monitoring of results						
Developing of quality business relationship						
Getting information, information analysis and forwarding						
Solving problems and decision-making						
Others (describe in detail) …………………………….…………						

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