Chapter One

Assessing Training Needs

All too often, the training needs in an organization are viewed in isolation from the bottom-line results that the organization is seeking. As a result, training courses are not part of an overall strategy for performance improvement that supports organizational goals. When this occurs, the design of a training program is often approached on a hit-or-miss basis. Some trainers decide what they want to teach (or receive orders from management) without sufficient regard for what the participants need to learn so that the organization can succeed. All this can be avoided by making an effort to assess the need for training and the training participants prior to training. Gathering information about the training need and the actual or potential participants is the first step in designing an active training program from scratch or tailoring an existing one for a specific group.

Sometimes the opportunity to assess the training situation is limited by time constraints and a lack of availability of data. Even in less than ideal circumstances, however, some assessment is necessary before finalizing the design. At the very least, it is helpful to obtain whatever information you can to answer the following questions:

1. What is the nature of the roles and tasks performed by the intended participants? What competencies do these roles and tasks require?
2. How many participants will there be?
3. How familiar are the participants with the subject matter of the training program?

4. What are the ages, sexes, or other important descriptive factors of the participants?
5. What are their attitudes and beliefs relevant to the training topic?
6. What successes and problems have the participants encountered?
7. What is the competence level of the participants?
8. Is the training voluntary or mandatory?
9. How well do the participants know one another?
10. What, if any, expectations do the participants' supervisors have with regard to the training program?

WHY DO ASSESSMENT?

When a problem exists within an organization, the first impulse is often to solve it with a training program. But training is not always the right solution, because the root cause of the problem is not always a lack of knowledge or skill. Instead, according to Gilbert (1996), it might also be any of the following:

- Unclear performance expectations and poor performance feedback
- Lack of tools, resources, and materials to do the job
- Inadequate financial and other rewards
- A poor match between employees' skills and the requirements of the job
- Lack of assurance of job security

Consequently, before even thinking about developing a training program, you need to determine whether training is the answer to the concerns being addressed. This requires an assessment process that, at its minimum, involves three steps:

1. **Pinpoint the problem** by interviewing the client, uncovering underlying issues, and identifying key stakeholders.
2. **Confirm the problem** by interviewing stakeholders, assessing the effect of the problem on the organization.
3. **Seek solutions** by identifying possible actions and gaining consensus on an action plan.

If the problem can be solved with training, some form of assessment is needed to ***help determine the training content.*** For instance, your group may need certain information or skills more than others. Perhaps the group has some prior exposure to the training topic and now requires more advanced knowledge and skills. Or possibly the group faces certain problems that will affect how much they can apply what you are going to teach them. Without such assessment information, it will be difficult to gear your program to the participants' needs.

Here are some examples of how assessment work completed prior to the training program paid off.

EXAMPLE: A bank manager felt that his customer service personnel needed further product knowledge training. An assessment survey revealed that what they needed more than additional product knowledge was training on how to sell the bank products to potential customers. The subsequent training was well received by the participants and led to increased sales figures for the branches.

EXAMPLE: A trainer in a large retail organization was about to deliver the company's standard course for store managers. She learned from exit interviews of store employers that their biggest reason for leaving was a lack of recognition by managers. She decided to add a module on employee recognition, a topic that had not been previously included in the standard course.

There are other good reasons to do assessment prior to the training program. When designing training activities, it is extremely helpful to ***obtain case material*** directly from the workplace or personal situation of the participants. If you do this, your designs can be based on real issues participants actually face rather than on simulated or "canned" material. Here are two examples.

EXAMPLE: For a sales training course in a pharmaceutical company, a trainer obtained examples of how area sales managers failed to collect ongoing feedback from account holders who had made recent purchases. The examples were woven into role-playing exercises that successfully engaged participants who previously had disliked the "artificiality" of role playing.

EXAMPLE: Prior to a training program, Head Start teachers were asked to list the most common problem behaviors they faced in their classrooms. The list was utilized in a course worksheet in which participants were asked to evaluate their consistency as classroom managers. The teachers reported that their evaluations were highly revealing because their own lists had been used.

One further reason to conduct assessments is the opportunity it affords to ***develop a relationship with participants*** prior to meeting them at the training site. Sending a questionnaire to participants, for instance, can be an occasion for writing about yourself and your plans for the upcoming program or for learning about their expectations. Phoning, emailing, or visiting some or all of the participants for an assessment interview can represent a chance to get acquainted in depth. Having some prior contact with participants reduces the feeling of awkwardness when you meet in the session at the start of the program. Here are two examples. If time is short, you could use several of the quick assessment tools available, such as SurveyMonkey, QuestionPro, Zoomerang, SurveyGizmo, or others.

Example: A training consultant was asked to conduct a course on organizational change for a management team in an insurance company. When he learned that some members strongly opposed the course, he arranged a meeting prior to the start-up date to gain their trust and interest to participate. The consultant clarified the agenda of the course and responded to the concerns of the group. At the conclusion of the meeting, he obtained not only their agreement to participate but also their commitment to play an active role in planning the course. In the end, he was able to build in content that addressed their needs.

Example: A trainer decided to interview some of the participants who would attend her course on performance appraisals. Knowing that management had been unhappy about the quality level of performance appraisals in the organization, the trainer began each interview with both frankness and reassurance by saying, “I have been asked by management to develop a training program to improve the ways performance appraisals are conducted here. I said I wanted to talk to some of the participants first before I planned the program. I’d like to learn straight from the source what actually happens in conducting performance appraisals as they are set up now. That way I might learn more about the problems that are occurring.” Word circulated about the interviews and helped to establish greater acceptance of the training program that followed.

To summarize, three major reasons exist for assessing participants prior to the beginning of a training program:

1. It helps to determine the training content.
2. It allows you to obtain case material.
3. It gives you an opportunity to develop a relationship with participants.

WHAT INFORMATION SHOULD BE COLLECTED?

As you think about the kinds of information that would be useful to you, consider first asking participants directly ***what are their training needs.*** Going straight to the participants for their input gives them a hand in helping to design their own program. Moreover, involving them in this manner is usually well appreciated.

One simple way to do this for a public workshop is to send out a brief questionnaire similar to the one shown in Figure 1.1. You can attach it to a course registration or confirmation form.

FIGURE 1.1 STRESS MANAGEMENT WORKSHOP PARTICIPANT QUESTIONNAIRE

In order to make your stress management workshop productive for you, please take a few minutes to respond to the following:

1. My current job position is:
2. I have been to a stress management workshop before.
   _____ never _____ once before _____ twice or more before
3. I would benefit by a general overview of stress management strategies.
   (no need) 1 2 3 4 5 (strong need)
4. I need to learn more about physical health and stress.
   (no need) 1 2 3 4 5 (strong need)
5. I need to know what stress management resources are available.
   (no need) 1 2 3 4 5 (strong need)
6. I need to know how to manage my emotions more productively.
   (no need) 1 2 3 4 5 (strong need)

FIGURE 1.1 continued

7. I need to know how to use relaxation techniques.

   (no need) 1 2 3 4 5 (strong need)

8. I need to learn more about developing myself spiritually.

   (no need) 1 2 3 4 5 (strong need)

9. What other needs or areas of interest do you have?

10. List three specific questions that you hope this workshop will be able to answer for you:

    a. ______________________________

    b. ______________________________

    c. ______________________________

Please mail this questionnaire in the enclosed envelope before September 25.

Thank you.

For an in-house program, consider sending a pre-course questionnaire similar to the one described in the following case example.

EXAMPLE: A training department instituted the practice of sending a pre-course participant feedback form to all participants of upcoming courses. It asked three basic questions:

1. What are your expectations of the course you are about to take?
2. Based on the course description, how do you perceive this program helping you in your current position?
3. What additional objectives or needs would you like the course to address?

Such a form usually gains widespread acceptance because it is perceived as a positive desire to meet the needs of company employees.

Besides participants' wishes, many other areas are worth exploring, both with the participants and with others who know them. First and foremost is information concerning the ***nature of the participants' work situations:***

- What are the participants' responsibilities? What does their job entail?
- Whom do they report to or relate to?
- In what aspects of their work will the skills and knowledge you will teach be employed?

If you were asked to conduct a program on meeting management, for example, you would want to know to what extent the participants' work involved team meetings and what these meetings were like. If you were conducting a public workshop on conflict resolution, knowing whether or not most of your participants are usually the victims in conflict situations would make a big difference in your design.

Next in importance is information about the ***knowledge, skills, and attitudes of the participants:***

- How familiar are participants with the content of your training program?
- How much opportunity have they had to practice or utilize skills that have been demonstrated to them previously?
- What are their feelings about the training topic? Do they value its importance?

Suppose you were designing a program on coaching and counseling skills for managers. It would be useful to assess what skills they already have acquired about coaching new employees or what attitudes they have held about the value of counseling troubled employees. Likewise, you would benefit from knowing how many participants in a weight control program have ever seriously exercised or what they fear about being thin.

Finally, it is helpful to find out any ***conditions that will affect participant involvement*** in the training program:

- What kind of support are participants likely to receive in implementing the training they are given?
- Are participants worried about their level of competence relative to that of other participants?

- Do participants feel they have been sent to the program because someone thinks they need to be "fixed"?
- Are participants unaccustomed to the active learning methods you hope to employ?

Assume, for example, that you have been asked to conduct a program for employees with writing deficiencies. Naturally, it would be useful to know if these employees have merely been sent to the program as opposed to having been positively encouraged by their supervisors to improve their skills.

Notice in the two questionnaires shown in Figures 1.2 and 1.3 how several areas of assessment information are tapped.

FIGURE 1.2 HEALTHCARE CUSTOMER SERVICE TRAINING PARTICIPANT QUESTIONNAIRE

Please take a few moments to complete this questionnaire. Your answers will be used to tailor the direction and content of our upcoming customer service training program here at Vital Health System. Thank you in advance for taking the time to respond. Your response will be considered confidential and will not be revealed to anyone other than the training program designers.

1. My work is primarily (check one): clinical _____ non-clinical _____
2. The people I would like to provide better customer service to are (check as many as apply):

   ___ patients
   ___ patients' family members
   ___ doctors
   ___ co-workers
   ___ other ___________________
   ___ supervisors
   ___ vendors
   ___ subordinates
   ___ visitors

3. Indicate the degree of difficulty you have providing excellent customer service in the following situations:

	Easy	*Somewhat difficult*	*Very difficult*
on the telephone	____	____	____
providing service to people from other cultures	____	____	____
difficult customers	____	____	____
angry or upset customers	____	____	____
delivering bad news or a "no" answer	____	____	____
when customer wants an apology	____	____	____
when there are a lot of customers	____	____	____
when under stress	____	____	____

FIGURE 1.2 continued

4. Describe three skills you would like to learn in this session:

   a.

   b.

   c.

5. Briefly describe a recent challenging situation in which you provided excellent customer service.
6. Briefly describe a recent situation in which you found it difficult to provide your best customer service.
7. Complete the following sentence:

   One of the reasons that make it difficult for me to provide good customer service is

   ____

8. Check the following terms associated with customer service that you are familiar with:

___ escalating the situation	___ service recovery
___ reading intent	___ Press Ganey
___ building rapport	___ expressing empathy
___ "I" messages	___ moments of truth

FIGURE 1.3 BANK TRAINING PARTICIPANT QUESTIONNAIRE

A new account management tool is being implemented at the bank. The tool will impact one of the existing software tools, Business First. Business First is a workflow management tool that is used by the analysts to make a decision on applications for business credit cards. The training session you will attend is designed to help users understand how the new account management tool will impact their daily activities in Business First. Your responses to this brief questionnaire will assist us in maximizing the value of this training.

FIGURE 1.3 continued

1. What is your current position? ______________________________

2. From the list below, please circle the tasks that you perform within your role at the bank. If a task is not listed, please state what that task is in the space provided for "Other."
   a. Work apps in queues
   b. Contact customer
   c. App data entry
   d. Decision apps
   e. Assign credit lines
   f. Issue new cards
   g. Manage team of analysts
   h. Determine credit policies
   i. Other: ______________________

3. Below is a list of terms you may or may not be familiar with. For each term, check the statement that best describes your understanding of the term.
   a. New Account Build
      - ☐ Never heard of it! What is it?
      - ☐ Heard about it, but not sure what it does!
      - ☐ Understand the basics behind the concept.
      - ☐ I've got it covered.
   b. Existing Account Check
      - ☐ Never heard of it! What is it?
      - ☐ Heard about it, but not sure what it does!
      - ☐ Understand the basics behind the concept.
      - ☐ I've got it covered.
   c. TSYS
      - ☐ Never heard of it! What is it?
      - ☐ Heard about it, but not sure what it does!
      - ☐ Understand the basics behind the concept.
      - ☐ I've got it covered.

FIGURE 1.3 continued

d. CPS

- ☐ Never heard of it! What is it?
- ☐ Heard about it, but not sure what it does!
- ☐ Understand the basics behind the concept.
- ☐ I've got it covered.

4. Have you ever participated in the testing of the Business First system?
   ___ yes ___ no

5. Rate the performance of the Business First system (i.e., speed, reliability, user friendliness) on the scale below. If needed, please give more detail behind your rating.

   ___ 1 (excellent)

   ___ 2

   ___ 3

   ___ 4

   ___ 5 (poor)

What questions or concerns would you like to see addressed in the training session?

HOW CAN INFORMATION BE COLLECTED?

If you had unlimited time and resources, how would you ideally collect information for a training program you were designing? Would you only utilize a questionnaire? Give this question some thought and then compare your ideas to the chart in Figure 1.4. As Figure 1.4 indicates, you can choose among a wide variety of techniques to gather assessment information. In addition, you can easily combine some of them. Here is a case example.

FIGURE 1.4 ADVANTAGES AND DISADVANTAGES OF NINE BASIC NEEDS ASSESSMENT TECHNIQUES

	Advantages	*Disadvantages*
Observation		
• Can be as technical as time-motion studies or as functionally or behaviorally specific as observing a new board member interacting during a meeting. • May be as unstructured as walking through an agency's offices on the lookout for evidence of communication barriers. • Can be used normatively to distinguish between effective and ineffective behaviors, organizational structures, and/or process.	• Minimizes the interruption of routine work flow or group activity. • Generates in situ data, highly relevant to the situation where response to identified training needs/interests will impact. • (When combined with a feedback step) provides for important comparison checks between inferences of the observer and the respondent.	• Requires a highly skilled observer with both process and content knowledge (unlike an interviewer who needs, for the most part, only process skill). • Carries limitations that derive from being able to collect data only within the work setting (the other side of the first advantage listed in the preceding column). • Holds potential for respondents to perceive the observation activity as "spying."
Questionnaires		
• May be in the form of surveys or polls of a random or stratified sample of respondents, or an enumeration of an entire "population." • Can use a variety of question formats: open-ended, projective, forced-choice, priority-ranking. • Can take alternative forms such as Q-sorts, slip-sorts, or rating scales, either pre-designed or self-generated by respondent(s). • May be self-administered (by mail) under controlled or uncontrolled conditions, or may require the presence of an interpreter or assistant.	• Can reach a large number of people in a short time. • Are relatively inexpensive. • Give opportunity of expression without fear of embarrassment. • Yield data easily summarized and reported.	• Make little provision for free expression of unanticipated responses. • Require substantial time (and technical skills, especially in survey model) for development of effective instruments. • Are of limited utility in getting at causes of problems or possible solutions. • Suffer low return rates (mailed), grudging responses, or unintended and/or inappropriate respondents.

FIGURE 1.4 continued

	Advantages	*Disadvantages*
Key Consultation		
• Secures information from those persons who, by virtue of their formal or informal standing, are in a good position to know what the training needs of a particular group are: a. board chairman b. related service providers c. members of professional associations d. individuals from the service population • Once identified, data can be gathered from these consultants by using techniques such as interviews, group discussions, questionnaires.	• Is relatively simple and inexpensive to conduct. • Permits input and interaction of a number of individuals, each with his or her own perspectives of the needs of the area, discipline, group, etc. • Establishes and strengthens lines of communication between participants in the process.	• Carries a built-in bias, since it is based on views of those who tend to see training needs from their own individual or organizational perspective. • May result in only a partial picture of training needs due to the typically non-representative nature (in a statistical sense) of a key informant group.
Print Media		
• Can include professional journals, legislative news/notes, industry "rags," trade magazines, in-house publications.	• Is an excellent source of information for uncovering and clarifying normative needs. • Provides information that is current, if not forward-looking. • Is readily available and is apt to have already been reviewed by the client group.	• Can be a problem when it comes to the data analysis and synthesis into a useable form (use of clipping service of key consultants can make this type of data more useable).

FIGURE 1.4 continued

	Advantages	*Disadvantages*
Interviews		
• Can be formal or casual, structured or unstructured, or somewhere in between. • May be used with a sample of a particular group (board, staff, committee) or conducted with everyone concerned. • Can be done in person, by phone, at the work site, or away from it.	• Are adept at revealing feelings, causes of and possible solutions to problems which the client is facing (or anticipates); provide maximum opportunity for the client to represent himself spontaneously on his own terms (especially when conducted in an open-ended, non-directive manner).	• Are usually time-consuming. • Can be difficult to analyze and quantify results (especially from unstructured formats). • Unless the interviewer is skilled, the client(s) can easily be made to feel self-conscious. • Rely for success on a skillful interviewer who can generate data without making client(s) feel self-conscious, suspicious, etc.
Group Discussion		
• Resembles face-to-face interview technique, e.g., structured or unstructured, formal or informal, or somewhere in between. • Can be focused on job (role) analysis, group problem analysis, group goal setting, or any number of group tasks or themes, e.g., "leadership training needs of the board." • Uses one or several of the familiar group facilitating techniques: brainstorming, nominal group process, force-fields, consensus rankings, organizational mirroring, simulation, and sculpting.	• Permits on-the-spot synthesis of different viewpoints. • Builds support for the particular service response that is ultimately decided on. • Decreased client's "dependence response" toward the service provider since data analysis is (or can be) a shared function. • Helps participants to become better problem analysts, better listeners, etc.	• Is time-consuming (therefore initially expensive) both for the consultant and the agency. • Can produce data that are difficult to synthesize and quantify (more a problem with the less structured techniques).

FIGURE 1.4 continued

	Advantages	*Disadvantages*
Tests		
• Are a hybridized form of questionnaire. • Can be very functionally oriented (like observations) to test a board, staff, or committee member's proficiency. • May be used to sample learned ideas and facts. • Can be administered with or without the presence of an assistant.	• Can be especially helpful in determining whether the cause of a recognized problem is a deficiency in knowledge or skill or, by elimination, attitude. • Results are easily quantifiable and comparable.	• The availability of a relatively small number of tests that are validated for a specific situation. • Do not indicate if measured knowledge and skills are actually being used in the on-the-job or "back-home group" situation.
Records, Reports		
• Can consist of organizational charts, planning documents, policy manuals, audits, and budget reports. • Employee records (grievance, turnover, accidents, etc.). • Includes minutes of meetings, weekly, monthly program reports, memoranda, agency service records, program evaluation studies.	• Provide excellent clues to trouble spots. • Provide objective evidence of the results of problems within the agency or group. • Can be collected with a minimum of effort and interruption of work flow since it already exists at the work site.	• Causes of problems or possible solutions often do not show up. • Carries perspective that generally reflects the past situation rather than the current one (or recent changes). • Need a skilled data analyst if clear patterns and trends are to emerge from such technical and diffuse raw data.

FIGURE 1.4 continued

	Advantages	*Disadvantages*
Work Samples		
• Are similar to observation but in written form. • Can be products generated in the course of the organization's work, e.g., ad layouts, program proposals, market analyses, letters, training designs. • Written responses to a hypothetical but relevant case study provided by the consultant.	• Carry most of the advantages of records and reports data. • Are the organization's data (its own output).	• Case study method will take time away from actual work of the organization. • Need specialized content analysts. • Analyst's assessment of strengths/weaknesses disclosed by samples can be challenged as "too subjective."

Source: Steadham, 1980, pp. 56–61.

Example: The president of a credit union contracted out for a team-building program for his senior management team. In preparation for the program, the trainer requested a copy of the new business plan that the team had recently submitted to its board of directors and a copy of the minutes of the team's weekly meetings in the last two months. He also interviewed the president and the three vice presidents of the credit union. These interviews focused on the problems facing the entire twelve-member team. On the basis of the interviews, the trainer designed a questionnaire. Before all the team members were sent the questionnaire, the interviewees were asked to evaluate and approve the first draft. Several items were reworded to use language that was friendly to the group. Figure 1.5 reproduces the final questionnaire, preceded by the message that accompanied it.

FIGURE 1.5 SENIOR MANAGEMENT EMAILED QUESTIONNAIRE

Dear (Team Member):

I am a team-building consultant who has been asked to conduct a special two-day course with the senior management staff of your credit union.

FIGURE 1.5 continued

As your organization is making a clear commitment to its own professional growth and development, I hope that you will see these two days as a valuable opportunity to communicate with each other without the constraints of daily deadlines and to build relationships with each other that will make you feel cohesive and united in purpose.

We will begin with some activities designed to "warm us up" and help us feel good about working together as a group. Following this, there will be some skill-building exercises to increase your group's effectiveness as a problem-solving team. The third phase of the course (and the longest) will be focused on identifying issues that need to be worked through in order to maximize your future effectiveness as a group.

An excellent way to begin doing some of this work is to collect information through a questionnaire and to feed back that information for group discussion during the course. I would like you to join with your colleagues in filling out the attached questionnaire. Your honest responses will enable the group to gain a clear view of itself.

Your participation will be totally anonymous. My job will be to *summarize* the results and report them to you for your reactions.

Thank you in advance for your cooperation and support. I look forward to working with you.

1. To what extent do you agree or disagree with the following statements?

   a. We avoid conflict among ourselves to keep things peaceful.
   (strongly disagree) 1 2 3 4 5 6 7 (strongly agree)

   b. We are dedicated to the credit union movement.
   (strongly disagree) 1 2 3 4 5 6 7 (strongly agree)

   c. We speak up when we need to; there can be healthy disagreements among us.
   (strongly disagree) 1 2 3 4 5 6 7 (strongly agree)

   d. We don't communicate with each other frequently enough.
   (strongly disagree) 1 2 3 4 5 6 7 (strongly agree)

   e. It's not always clear who's responsible for a certain assignment or problem ("I thought you were going to do it").
   (strongly disagree) 1 2 3 4 5 6 7 (strongly agree)

   f. Others don't understand my operation and its needs.
   (strongly disagree) 1 2 3 4 5 6 7 (strongly agree)

   g. There's little backbiting around here.
   (strongly disagree) 1 2 3 4 5 6 7 (strongly agree)

FIGURE 1.5 continued

h. We have a tendency to be unrealistic.
(strongly disagree) 1 2 3 4 5 6 7 (strongly agree)

i. There are different beliefs among us about the way the credit union should conduct its business and relate to members.
(strongly disagree) 1 2 3 4 5 6 7 (strongly agree)

j. Men and women in our group can work comfortably together.
(strongly disagree) 1 2 3 4 5 6 7 (strongly agree)

k. We give each other recognition and words of appreciation.
(strongly disagree) 1 2 3 4 5 6 7 (strongly agree)

l. It's hard to know what others think about the issues and problems around here.
(strongly disagree) 1 2 3 4 5 6 7 (strongly agree)

m. We are well organized, with clearly defined procedures. Things run smoothly here.
(strongly disagree) 1 2 3 4 5 6 7 (strongly agree)

n. Decisions are controlled from the top.
(strongly disagree) 1 2 3 4 5 6 7 (strongly agree)

2. Because the president holds the key leadership role in this credit union, it would be helpful to provide him with some feedback. Please comment about the following:

What are some things you would like the president to

a. Continue doing?

b. Stop doing?

c. Start doing?

3. What suggestions do you have to maximize your teamwork and team effectiveness in the future?

As a result of the data obtained from the reports, interviews, and questionnaire, the trainer discovered that two problems significantly affected the effectiveness of this team: (1) a lack of understanding of the needs of each work unit in the credit union and (2) poor team meetings. The standard course on team building offered by the trainer was redesigned in order to give significant attention to these two problem areas.

One additional technique for assessing participants may be considered in addition to those already discussed. If conditions warrant, a trainer can give a ***pre-course assignment*** to participants both to learn about their skills and to obtain case material for the course, as shown in the following example.

Example: A pre-course assignment was used in a train-the-trainer program. The confirmation reproduced in Figure 1.6 was emailed to participants. When Part One of the assignment was returned, it was possible to assess how well the participants were able to specify training objectives. Part One was also used as an exercise in the training program: When the portion of the program devoted to the skill of specifying objectives had been completed, participants were asked to rewrite their own statement of objectives. Part Two of the assignment also served to provide course material for the program.

FIGURE 1.6 TRAIN-THE-TRAINER PRE-COURSE ASSIGNMENT

TO: Participant
FROM: Human Resources Department
SUBJECT: Administrative Information and Pre-Course Assignment

We are pleased to confirm your enrollment in the Active Training program that is being conducted at the Federal Plaza Building on June 30 through July 2.

As our organization changes, the ability to train and develop people on the job has become increasingly critical. Our main purpose in this seminar is to help managers and professional staff to effectively and efficiently share their expertise with others.

This seminar is designed to help you improve your effectiveness in any training you may be asked to do. Our goal is to help you with your specific training needs. To ensure that we can accomplish this, please complete Part One of the pre-course.

Assignment by Monday, June 22.

PART I

COMPLETE AND RETURN TO *(trainer)*
AT *(place)* BY *(date)*
Select a topic that you might be asked to teach over a two- to three-hour period.

This topic could be something that you've already taught in a training program or a topic that you can imagine teaching in the future.

What are your objectives for this session? Outline them below.

PART II

COMPLETE AND BRING TO CLASS ON *(date)*
Choose a fifteen-minute segment from the training topic you described in Part One and follow these directions.

- Specify your objectives for this fifteen-minute segment.
- Think about how you would present this fifteen-minute segment.
- Identify the instructional materials, if any, you would use. *Please bring an example of these materials to class*.
- Develop an outline of your presentation.

NOTE: *On the second day of the program, you will be asked to present this material to four or five other participants. In this way, you will get some useful feedback on your presentation style*.

WHAT IF THERE IS NO TIME TO DO A PROPER ASSESSMENT?

The last question to be considered is a practical one. Not all situations are ideal; obstacles to undertaking assessment data collection do arise. With significant lead time, you can utilize many of the techniques outlined here. But you may easily face a situation in which a training program has to be designed and implemented hastily and/or the identity of the participants is largely unknown (this is particularly true for public workshops).

When these problems occur, try not to be discouraged. You will, of necessity, have to design the program by making your best guesses about the nature of the participants and their needs. However, you will still have some ability to obtain quick information and adjust the design accordingly. Here are some recommendations:

1. Phone a contact person who may have some familiarity with the participants and ask that person the basic questions listed at the beginning of this chapter.
2. Phone a few known participants, introduce yourself, and ask them some key questions. Hope that their responses are representative and treat them as a sample of the larger group. Or ask a contact person to set up a phone interview schedule for you.
3. Have any relevant materials (surveys, meeting notes, or records) delivered to you.
4. Contact other trainers who have worked with your training group to get their opinions and impressions.
5. Talk to participants who arrive early on the day of the program and obtain whatever information you can.
6. Design some activities at the beginning of the program that will enable you to make some assessments of the group. (More information about this is given in Chapter 3.)

If you have done some contingent planning in your overall design, it still should be possible to make final adjustments before your session begins.

WORKSHEET

ASSESSING TRAINING NEEDS

Before going on to the next chapter, try your hand at applying the ideas in this chapter. Use this worksheet to outline how you might assess participants for your next training program.

Information Desired: (check as many as desired)

_____ Participants' stated needs

_____ The nature of the participants' work

_____ Participants' knowledge

_____ Participants' skills

_____ Participants' attitudes

_____ Conditions affecting participant involvement

Methods Desired: (check as many as desired)

_____ Observation	_____ Print media	_____ Tests
_____ Questionnaire	_____ Interview	_____ Records, reports
_____ Key consultation	_____ Group discussion	_____ Work samples

Assessment Outline:

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