Relevant Training

Training Planning
in Small and Medium-Sized
Enterprises (SMEs)

A Handbook

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Preface

Small or Medium-Sized Enterprises, SMEs (up to 250 employees, less than 50 M€ turnover[1]) are the backbone of European economy and probably also world-wide. Their business environment is not always training-friendly as training funds and time are often limited. Training is, as a general rule, often needed in all companies and it matters that the right people get the right training. The Training Planner project aims to help consultants/advisors to SMEs to assess training needs in a more efficient way to develop the relevant competencies to the relevant staff. This is more easily said than done.

The Training Planner (TP) Project is a transnational project co-funded by the EU Leonardo Life-Long learning Programme and four European partners. A training planner (TP) is a human resources (HR) consultant that compiles a training and learning needs assessment and designs a tailor-made training program and learning activities for companies. The aim of the project is to introduce a TP procedure which has been used in Iceland for several years to other European countries.

This handbook provides information and resources on the theoretical and practical approach to strategic training and development. The handbook is aimed at Training Planners (TPs) and HR professionals. It addresses the challenges enterprises confront today when trying to improve their organizational effectiveness and competitiveness through investment in human capital. Intended as a practical guide on the analysis, planning and evaluation of training and learning, this handbook includes explanations, examples, tools and templates.

[1] http://ec.europa.eu/enterprise/policies/sme/facts-figures-analysis/sme-definition/

The handbook consists of an introduction, six chapters, glossary and appendixes:

- The introduction describes the aims, background, and experience of the Training Planner Project in Iceland based on lending out an external Human Resource consultant, called Training Planner (TP), to companies, especially small and medium size enterprises (SMEs). It also outlines the Leonardo Project based on the TP project and the project participants.
- The first chapter describes the process of training planning, step by step.
- Chapter two concerns Strategic Human Resource Development (SHRD). It provides definitions of training and development and strategical terms, discusses the major factors influencing the training, how the training should align to the business strategy and why the TP concept is of value for companies.
- The third chapter explains Training Needs Assessment (TNA), why it is important, the three phases used in the approach to conducting a TNA in the training planning, The Quarternaire Methodology used in Spain and the tools and sources used in the TNA.
- Chapter four outlines four types of training/ learning needs.
- Chapter five describes training/learning solutions like courses, internal and external, on the job training, mentoring, job aids/guidelines and how important it is to match methods with the TNA outcomes.
- Chapter six details the evaluation of training and learning solutions. It provides a theoretical background for the Return on Expectation (ROE)

model and describes how it has been used in the TP project in Iceland.

- The glossary explains the key terms and concepts highlighted in bold in the handbook text.
- The appendix provides additional information on specific issues.

This handbook should be useful to those who plan training in both the private and public sectors. The authors hope that it will serve as a practical guide based on the HR theories it contains and the extensive experience of the authors.

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1. Introduction

The Training Planner: EU Leonardo Project

The aim of this project was to export a concept, developed in Iceland, based on lending out an independent Human Resource consultant, called Training Planner, to companies, especially small and medium size enterprises (SMEs). The project looked into how the successful concept of the Icelandic Training Planner could be transferred to other European countries, initially Austria and Spain. Additional information is available on the project website www.t-planner.eu

The consortium behind the project is Starfafl Vocational Training Fund in Iceland, Attentus HR Consultancy in Iceland, BEST Training and Consultancy in Austria and Fondo Formacion Euskadi in Basque Country (Spain). Starfsafl and Attentus have 6 years of experience in developing the concept of Training Planner in large number of companies in Iceland that have participated in the programme. BEST and FF Euskadi are well known VET providers and consultants in their home countries with substantial experience in international projects. The project was conducted between October 2011 and September 2013.

The Training Planner is a consultant that compiles a training and learning needs assessment, looks into the competencies needed in each job and designs a tailor-made training program and learning activities for the company, based on documents review, interviews with managers and focus groups from all work categories. Experience from this on-going Icelandic project has developed more focused training programs and learning plans, which are more accurately targeted towards the needs of each company and its employees.

The Training Planner in Iceland

Since 2007 Starfsafl Vocational Training Fund (VTF), together with three other VTFs,[2] has lent out an independent HR consultant, a Training Planner, to companies in the Reykjavik (capital) area. Over 10.000 employees in over 60 companies have benefitted from this pilot project. The companies are varying in size, from 10 to 750 employees. The only requirement from the fund is that the company employs low-skilled workers, members of the unions behind the VTFs, preferably the majority of the company workforce, but not necessarily.

In the Icelandic case, the external HR consultant, the Training Planner, is free of charge for the company. Starfsafl and other VTFs absorb the cost. The Training Planner then performs a training needs assessment for the target group, through interviews and focus groups. After the needs analysis, the consultant compiles a training plan consisting of courses, training, mentor inputs etc. The plan is then discussed in a meeting with Starfsafl (and other VTFs), company directors and the external consultant. The company can then apply for funding (up to 75% of paid costs) to fund the cost of external learning providers, or some payment to internal trainers, according to the rules. Usually, Starfsafl pays up to 100 consultant hours for large companies (but still SMEs) and 15-20 hours for the smallest companies.

Training funds in Spain and the Basque Country

In the Basque Country in Spain there are different funding possibilities for companies for training needs assessment and training courses. The main tools the Basque companies have are:

[2] Besides Starfsafl VTF, Landsmennt VTF (general workers in rural Iceland), SVS VTF (workers in commerce and service) and RafÍs (union VTF for electricians) support the TP project.

1. FTFE – (Tripartite Foundation for Training in Employment).
   Its scope is national and it is managed through the "Training Credit" and the "Subsidised Training" system, i.e. through benefits to the companies from National Insurance fees. It only funds training in companies.
2. HOBETUZ – (Basque Foundation for Continuing Vocational Training).
   Basque fund that offers direct funding to the companies for training and also funds more detailed analysis of training needs.

Training funds in Austria

In Austria, the cost of training needs assessment is usually embedded in training costs and absorbed by the training provider. TNA is usually not conducted in a formal way but through interviews with managers and sometimes questionnaries to different staff groups. No specific funds pay for the TNA *per se*.

However, the WAFF (Vienna Employee Support Fund) does take over costs for company trainings in certain circumstances and under certain conditions. The recently launched programme "Qualifikationsplan 2020", supported by several Viennese policy makers and key players (e.g. Vienna Municipality, the waff) will provide for a new platform opportunity to implement T-Planner as part of various respective training measures. The "Qualifikationsplan 2020" foresees that every employee in Vienna, by the year 2020, will hold at least secondary/compulsory school level certficate (equivalents). BEST has joined forces with stakeholders promoting and implementing this plan and will offer trainings based on the T-Planner approach.

Theoretical background

The TP project is based on Strategic Human Resource Development (SHRD, see chapter 3.4). It uses a three-phase analysis model (see chapter 4.3.). The program starts by asking managers and employees for their expectations and outcomes for the training employing the Return on Expectations (ROE) procedure (see chapter 6). Attentus – Human Resource Consultancy in Iceland has based its training consultancy on this theoretical background.

Exporting the TP project approach to training to Austria and Spain has added extra value to the Icelandic method.

The implementation of the TP project in Iceland

Starfsafl conducted qualitative research amongst seven companies with 20 - 250 employees dealing with the experience of the TP.

Main findings

All of the companies were satisfied with the project "Training planner on loan" and thought the implementation and organization of the project were well executed. The work of the external training planner saved time and employees were more receptive to the project work further on.

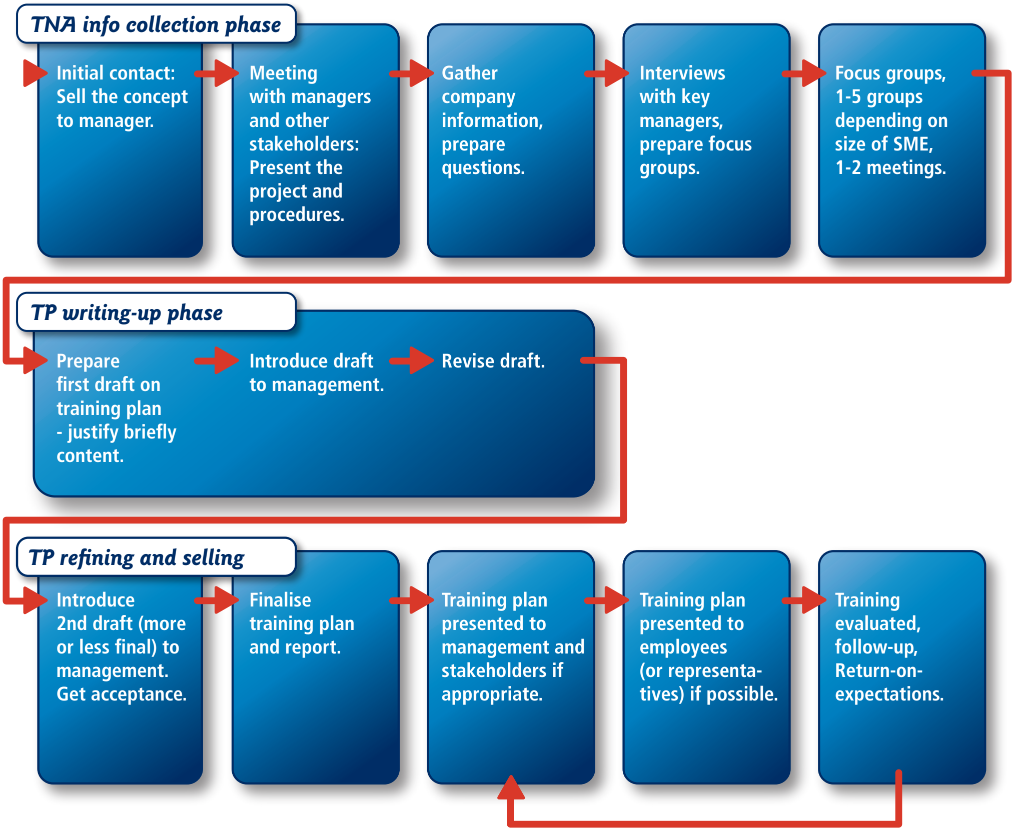
2. The Training Planning Process

Figure 1. The process of Training Planning. Content of the boxes are briefly explained in text below. Figure © authors.

Key topics covered in this chapter

- *The process of TP, step by step*

2.1. The Training Planning Process



2.1.1. Meeting with CEO/managers - presentation of the project

Partnership with managers is extremely important to ensure effective training. A meeting with the CEO and/or other managers at the beginning of the TP project is the first step in the process. At the meeting the project is presented and the TP asks for the CEOs expectations and outcome of the project (see Chapter 6 on Return on Expectations). The partners involved should sign a confidentiality agreement protecting all information gathered during the process of training planning.

2.1.2. Review of documents

The TP needs to gather information about the organization e.g. **mission** and **strategy**, the culture and internal environmental factors, job/**competency** descriptions, performance standards and barriers and enablers for training. (See Chapter 3.4 on Strategic Human Resource Development and Chapter 4 on Training Needs Assessment.)

2.1.3. Meetings - focus groups

In the TP project interviews and focus groups have proved to be the most effective way of gathering data among middle management/supervisors and employees (see chapter 4.5.3 on Interviews and Focus Groups).

2.1.4. The Training Plan

The training plan (see Appendix 1 and 2) is an outcome of the training needs assessment (TNA) and important tool in the implementation of the training. It provides information on the needs identified in the TNA and the goal of the training solution. It specifies the audience and the preferred time for the solutions to be carried out.

The suggested training solutions can vary, for example courses, **job aids**, self-study, **mentoring**, **job rotations** etc. In most cases instructors are recommended, both internal and external, but it depends on the needs of the organization. If the enterprise has a learning consultant, he or she most often stays in good contact with training providers. The smaller companies often need more support from the TP in finding external instructors. The training plan also includes the organization's priorities to ensure that the training is addressing those and the results/measurements that reflect the managers' and employees' expectations are listed. Those measurements often exist in the organization, for example customer service audits and employee surveys.

The training plan also prioritises if the training solution is "need to have", "value adding" or "nice to have." Most of the training has to be value adding to the company.[3]

See appendix for examples of training plans.

2.1.5. The Report

Reporting the results of the training plan is the final step in the process. The TP may have two types of reports. One is for the organization and the other, a shorter one, is for the funds that supported the project. Both are confidential.

The report to the organization addresses the results of the TNA. It includes the scope of the organization, mission, **values**, priorities, number of employees, location, barriers and enablers for the training, the current training solutions, the manager´s and employees' expectations for the outcome of the training, the training needs and the training plan. Sometimes the TP also identifies the competencies needed for each job but sometimes the organizations have already completed that work.

If the TP process is externally funded then the report to the funds includes the main information on the organization, the expectations for the training outcome and the training plan. Different demands can be raised by different funders.

[3] Kearns (2005).

In order to make the training successful the managers have to believe that training is an important tool to improve business and increase employee satisfaction. Managers are engaged with many tasks and therefore it is essential that the report is neither too extensive nor uses HR jargon. TP reports are ideally around 20 – 30 pages with a clear one-page abstract.

3. Strategic Human Resource Development (SHRD)

Key topics covered in this chapter

- *Definitions of training and development*
- *What is strategy?*
- *The major factors influencing the business strategy and the training*
- *What is Strategic Human Resource Development (SHRD)?*
- *How do we sell the concept to the managers?*

3.1. Training and development defined

In the TP process training and development is defined as following:

- Training is the systematic process of providing an opportunity to learn knowledge, skills, attitudes and behavior for current or future jobs.
- Training is a part of the organization´s performance systems and continuous quality improvement.
- Training provides the opportunity for learning.
- Development is broader than training. Its goal is to enhance individual competencies.[4]

[4] Definition based on Blanchard & Thacker (2010), Rossett (2009) and Mankin (2010).

3.2. What is strategy?

If training is meant to be a part of the organization´s performance systems it has to align to its strategy. There are many defininitions of strategy but here Olafsson's definition (2005) has been chosen: "Strategy describes the result aimed at and how it should be accomplished". The general strategy begins with a mission statement which states why the organization exists. Here are examples of mission statements from four different types of organizations, three of them are located in the Training Planner project partners countries, Spain (The Basque Country), Austria and Iceland.

1. **The Guggenheim:** The mission of the Solomon R. Guggenheim Foundation is to promote the understanding and appreciation of art, architecture, and other manifestations of visual culture, primarily of the modern and contemporary periods, and to collect, conserve, and study the art of our time.[5]
2. **The Vienna Police Department:** The Vienna Police Department will provide professional and impartial Law Enforcement services to the citizens and visitors to our community. The Department is dedicated to the prevention of crime; the protection of life and property; the maintenance of law and order; the enforcement of laws and ordinances; and upholding the constitutional rights of all those within our jurisdiction. Our commitment is driven by maintaining the highest standards of Law Enforcement.[6]
3. **Starbucks Coffee:** "Our mission is to inspire and nurture the human spirit – one person, one cup and one neighborhood at a time."[7]

[5] http://www.guggenheim.org/guggenheim-foundation/mission-statement
[6] http://www.viennapolice.com/portal/about/mission-statement/
[7] http://www.starbucks.com/about-us/company-information/mission-statement

4. **Lysi:** A leading Icelandic company in the research, development, processing, selling and marketing of marine lipids. Lysi's "primary goal is to continue to be the most reliable producer there is of products for the improvement of health and quality of life."[8]

3.3. Major factors influencing the business strategy and the training

The mission statement outlines what the strategy should achieve. Both external and internal elements influence the organization´s ability to accomplish its mission. Each enterprise has to decide in which markets it chooses to compete in. It also has to figure out how its business on the whole can perform better than its competitors. Besides the financial resources it is important to assess the skills and competencies that are needed in the workplace for optimal performance. Also what external factors can affect their ability to compete, like the economic situation or the supply of talented employees. Last but not least the values and expectations of stakeholders, as owners and employees, have great impact. All these factors have to be taken into account when planning training (Figure 2).[9]

Each company then states its strategic goals. Strategic goals should be measurable to be able to track the results. Where do we want to go, what do we need to get there and how do we know we are there? Measurements can be, for example, specific outcomes in customer and employee satisfaction, customer complaints etc. The strategic planning and management system — Balanced scorecard (BS)[10] suggests viewing the organization from four perspectives, customers, finance, people/learning and processes. According to BS, examples of strategic goals could be:

- Improved service approach for customers (Customers).

[8] http://www.lysi.eu/AboutLYSI/WhatWeStandFor/
[9] Adapted from Johnson & Scholes (2002).
[10] Kaplan, R.S. & Norton, D.P. (1992).

Figure 2. Major factors influencing the business strategy and the training (adapted from Johnson & Scoles (2002)).

- Increased market share by five percent (Finance).
- Development of competencies useful for customer support (People/Learning).
- Improved internal processes to realize efficiencies (Processes).

We can also consider the organisation in terms of the 3 ‘P’s: People, Processes and Payback and the means to improve every ‘P’.

3.4. Strategic Human Resource Development

The role of Strategic Human Resource Development (SHRD) is to improve the organizational effectiveness and competitiveness through people.[11] It provides the employees with the competencies that will enhance their current or future performance. It is important to focus on the competencies that meet the needs and goals of the organizations, that the employees see as important and they will transfer to their jobs.

To summarise, SHRD:

- Based on alignment to the organization's vision, strategy and goals.
- Looks into the competencies needed in each job.
- Identifies the "gap" between performance required and current performance (e.g. the training and learning needs).
- Asks for the managers´ and employees´ expectations on the outcome of the training and development.
- Develops a tailor-made training plan and learning activities for the company based on sources, interviews and focus groups from all job categories and in cooperation with the managers.
- Measures the results of the actions taken.

3.5. How do we "sell" the concept to managers?

For training to be successful the managers have to be convinced that training is one of the tools that helps them achieve their business goals. Strategic training, learning and development add value to the business and it is important that the organization can learn more quickly and effectively

[11] Adapted from Blanchard & Thacker (2010), Kearns (2012).

than its competitors. Most CEOs and managers are concerned with anything that creates and adds value to the operation. Therefore training and learning must be considered as an investment but not as a cost.

How do we get the managers to believe that training and learning will impact the business results? Involving management early in the needs analysis benefits the outcome. The experience of the TP project has shown that it helps if the consultant knows about the organizational context, vision and strategy and encourages discussions with the managers which identify the barriers and enablers to good performance. Then the suggested actions become more systematic, strategic learning and training integrates into the business and adds value to the organization which now looks at human resource development as an investment. In the TP project the consultants have always had a meeting with the CEO and/or the upper management to assess their expectations for the outcome and result of the training (see also section 4.2).

To sell the concept to managers it is important that the TP emphasizes the following:

- Training must align to business goals.
- Properly defined and conducted, training is an investment that should return measurable gains such as:
    - Increased revenues.
    - Better quality of products (goods and/or service) as experienced by the customers.
    - Lower cost of production/service.
    - Lower staff turn-over, less absenteeism.

4. Training Needs Assessment

Key topics covered in this chapter

- *Training needs asessment (TNA) defined*
- *Why needs assessment is important*
- *The three–step model in conducting a training needs assessment*
- *The QUARTERNAIRE Methodology in conducting a training needs assessment*
- *Tools and sources in the needs assessment: Documents, interviews and focus groups*
- *Key success factors of an effective TNA*
- *Four types of needs*

4.1. Training Needs Assessment (TNA) defined

Training needs assessment (TNA) is a systematic method for determining what causes performance to be less than expected in order to make effective decisions or recommendations about what should happen next. Sometimes the recommendations involve training; sometimes not.[12]

4.2. Why TNA?

Many companies invest in training and believe that effective training improves their performance and results, motivates the employees, boosts their confidence

[12] Adapted from Blanchard, N.P. & Thacker, J.W.(2010) and Rossett, A. (2009).

and satisfaction. But in times of economic recession, training budgets have decreased and there is a greater demand for doing "more with less". The managers want to use the resources for training more effectively. Therefore they see it as important to find out why to train, what to train and whom to train. Training needs assessment is a tool for answering these questions.

- TNA helps the organization align its training with its strategy.
- TNA increases the chances that the money and time will be spent on relevant training.
- If TNA is not conducted, training might be incorrectly used as a solution to performance problems when a lack of training is not causing that problem. Also, without TNA, the chances are that money and time is spent on irrelevant training that invokes resistance to future training. We can easily "vaccinate" people against training with the wrong training activities.
- TNA involves managers and employees in the process and increases their motivation and understanding of training.
- TNA determines the expectations and outcome of the training for example learning, behavior change or financial results.
- TNA and TNA-based or derived solutions are closely connected to the company's quality management of products and services.
- TNA results in solutions and not only training and learning.

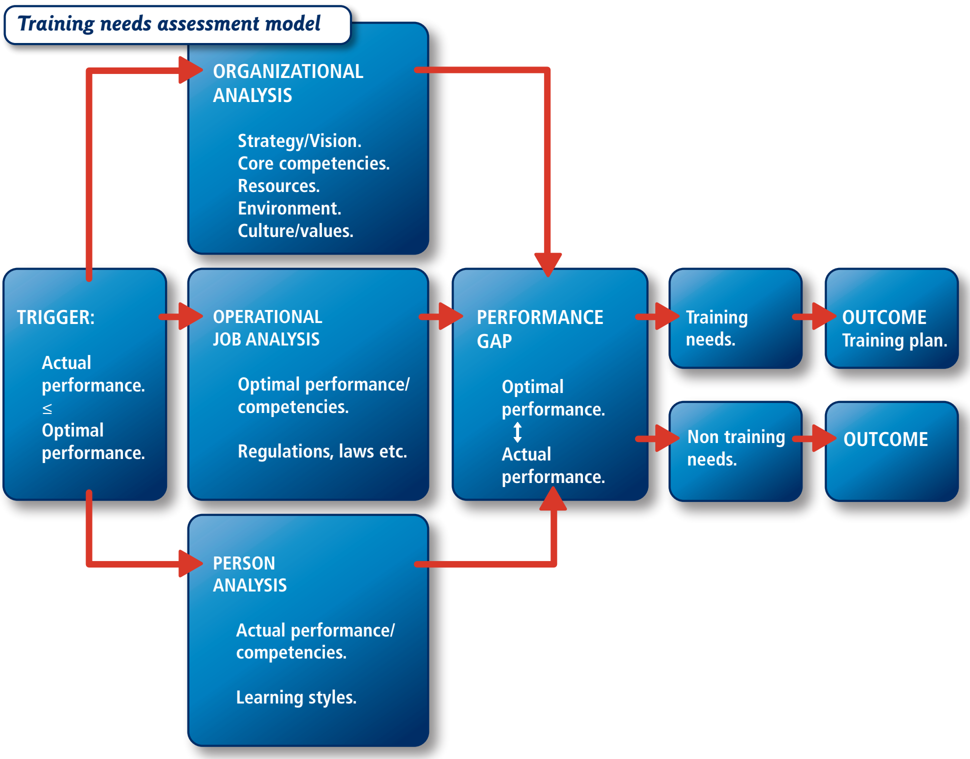
4.3. Model in conducting a Training Needs Assessment

The TNA model which the TP project in Iceland has found to be the most effective is the one from Blanchard & Thacker (2010), also based on Rossett´s (2009) ideas.

4.3.1. The trigger

The model starts with the trigger of the TNA. The trigger can be that there is a current performance problem or a possible future scenario. Examples of other triggers can be introduction of new products, rapid expansion (new employees) or rapid down-sizing, new technology, new legislation, job redesign, new strategy or the CEO´s decision to make training an effective way to achieve business objectives.

Figure 3. Training needs assessment model. Adapted from Blanchard & Thacker (2010) and Rossett (2009).



The three steps in the model are the organizational analysis (OrA), operational analysis (OpA) and person analysis.
Table 1 gives further explanation of the three–step model.

Table 1. Components of the TNA model

ORGANIZATIONAL ANALYSIS	OPERATIONAL/JOB ANALYSIS	PERSON ANALYSIS
Mission, vision, strategy and goals?	What are the optimal competencies and performance?	What are the actual competencies and performance?
What are the core competencies and priorities?	Regulations and standards.	What are the optimal competencies and performance?
Culture and infrastructure.	What training is needed?	Who needs training?
Is training the way to reach the outcome?	In which jobs is training important to increase quality and customer service?	Age, education, experience, motivation, learning style, attitude towards company, job and training.

4.3.2. Organizational analysis (OrA)

Organization analysis looks into the internal environment of the organization that affects employee performance. The issues are mission, strategy and priorities, performance problems, barriers and enablers, resources, capabilities of the workforce and expectations for the outcome of the training. An Icelandic company´s primary goal "is to continue to be the most reliable producer there is of products for the improvement of health and quality of life."[13] Training must therefore focus on quality and purity of the production.

[13] http://www.lysi.eu/AboutLYSI/WhatWeStandFor/

Table 2: Information the Organizational Analysis (OrA) should provide

ITEM	WHAT TO LOOK FOR	SOURCES
Mission, strategy and priorities.	Is training important to achieve the business objectives? What are the organizations´ priorities for the coming months/years?	Top management/ department managers/ supervisors. Company strategy. Home page, intranet, annual report.
Performance problems.	What is causing performance problems? Why are employees not performing as they should?	Top management/ department managers/ supervisors/HR managers. Absenteeism. Productivity. Quality of products. Attitude surveys. Customer surveys.
Barriers and enablers.	What can prevent or enable the training to be effective? Does the company have the resources needed, e.g. time and budget? What are the managers' attitudes towards training and development? Access to information? Technology in training? Factors in the internal environment?	Top management/ department managers/ supervisors/ HR managers. Budget. Attitude surveys.
Expectations.	What should be the outcome of the training? What are the company's expectations for the training?	Top management/ department managers/ supervisors/ HR managers.
Capabilities of the workforce.	What are the capabilities of the workforce to carry out the company's priorities?	Top management/ department managers/ supervisors/ HR managers. Productivity. Quality of products.
External requirements.	What laws and regulations apply for the business?	Law and regulations.

Questions the company has to ask could be the following:

- What competencies and practices do our employees need to achieve our goals on reliable quality products?
- Who are our customers and how do we fulfill our promises on the improvement of health and quality of life?
- What processes and procedures do we need to reach our goals?

Table 2 explains what information the Organizational Analysis (OrA) should provide.

4.3.3. Operational analysis (OpA)

Operational analysis reviews descriptions of jobs and competencies. OpA gathers information on what task the employees need to accomplish now and (sometimes) also in the future. OpA states the optimal performance (Table 3).

4.3.4. Competencies of the job

Definitions and interpretations of competencies vary. In the TP project competence is defined as the knowledge, skills, attitudes, behavior and personal attributes someone needs

Table 3. Information the Operational Analysis (OpA) should provide

ITEM	WHAT TO LOOK FOR	SOURCES
Job description.	What tasks has to be done in the job.	Written job descriptions department managers /supervisors/employees.
Descriptions of competencies/performance standards.	What knowledge, skills, attitudes, behavior and personal attributes are optimal for the job?	Written descriptions of competencies/performance standards department managers /supervisors/employees.

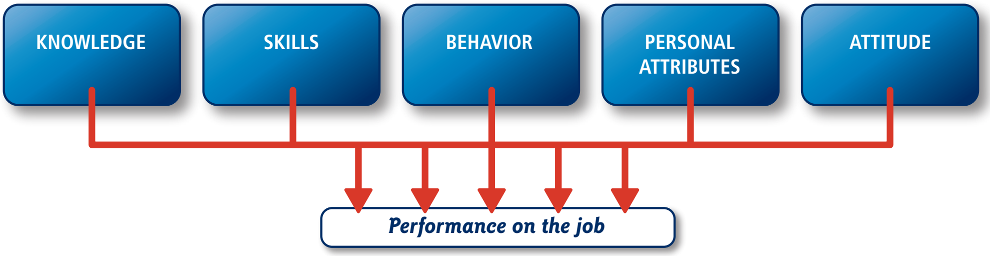


Figure 4. Competencies defined

to be competent at their job and successful in performing tasks (Figure 4).

The European Qualifications Framework for lifelong learning (EQF) defines competence as "the proven ability to use knowledge, skills and personal, social and/or methodological abilities, in work, in study situations and in professional and personal development".[14] The EQF has proven to be very useful in designing curricula in all sorts of training and is the recommended (if not mandatory) procedure for European training providers.

Sometimes the companies in the Icelandic TP project had their competencies defined;[15] sometimes not. The most successful method in mapping and defining competencies has been using interviews and/or focus groups with supervisors/managers and focus groups with employees (see section 4.5.3. on focus groups). The experience tells us that employees love to share information and experiences about their work and employees and managers most often agree on the competencies needed for the job.

Table 4 shows a description of competencies for a production worker in one of the Icelandic TP project companies. The first group, general competencies, refer to a wide variety of knowledge, skills and attitudes that are neither specific to the task, industry nor the firm, for example, literacy or mastering foreign languages. Communication skills and personal traits are also transferable between tasks or firms. Examples of these are tolerance, drive or positive attitude. Job/task related competencies are specific to both firm and task, for example, repairing custom designed

[14] http://ec.europa.eu/education/pub/pdf/general/eqf/broch_en.pdf.
[15] Based on Dubois & Rothwell (2004), Nordhaug (1999), Blanchard & Thacker (2010).

Table 4. Description of competencies for a production worker in one of the TP companies

GENERAL	COMMUNICATION SKILLS / PERSONAL TRAITS	JOB RELATED	INTRA ORGANIZATIONAL
Be able to operate a fork lift (few employees).	Act thorough and precise.	To realize the importance of clean care on the job and be clean and tidy on the job.	Know all the products of the company.
	Be conscientious.	Know the cleaning regulations and follow them.	Know the goals of the company.
	Be flexible.	Be able to operate machines: Mixer and boiler.	Know the different jobs of the company and who is doing them.
		Be able to read and follow product recipes.	
		Be able to evaluate if product is defective.	

technology or managing specialized local filing systems. Intra-organizational competencies enable employees to be effective within the company they work for. Examples of what these competencies include are knowledge of the company's strategy and goals, its employees and informal networks as well as symbols and norms.

4.3.5. Person analysis

Person analysis identifies the employees who do not meet all the competency requirements or performance standards. They need training or other solutions to be able to fulfill the standards. Their actual performance/competencies are less than the expected ones and therefore there is a performance gap. The TNA helps shed light on the obstacles and causes for the gap (Figure 5).

Person analysis

ITEM	WHAT TO LOOK FOR	SOURCES
Actual performance /competencies.	What are the obstacles and causes for individual performance problems? Why is the employee not performing as he/she should?	Management/department managers/supervisors. Performance Appraisals. Absenteeism. Accidents. Customer complaints. Customer behavior.

Figure 5. TNA is necessary to map the performance gap.

4.4. The QUATERNAIRE Methodology

One training needs analysis methodology is commonly applied in Spain. This method is called QUATERNAIRE methodology and it is based on the concept of "Training Engineering". This TNA-method applies the following procedures and principles:

- There are no professional training needs "as such", they are always linked to particular situations (problems to be treated, difficulties to be solved, projects to be developed etc.) which are in the background.
- Indirect methods of investigation must be applied; asking directly "what are your training needs?" leads to a lack of definition and excessive generalisation by the interviewees.
- It is more advisable to start from particular situations (problems, projects, evolution of

Table 5. Stages for the elaboration of a training needs analysis according to QUATERNAIRE

STAGE	PERFORMANCE	OBJECTIVE	TASKS
1	Identify the foundation of the training plan.	Overview of the company. Overview of the prioritized sources of training need. Involve the management in the plan.	Collect data from companies. Identify and analyse sources of needs: Problems, projects, jobs, cultural changes. 1st VALIDATION with Company Managers
2	Identify the training needs and their responses.	Identify the training needs: Formulate them by training objectives. Indicate the order of priority. Evaluate their contribution to exploitation.	Deepen into the sources of needs. Analyse real profiles and those required by the jobs. Define operational objectives. Specify the expected contribution. Collect guidelines and training modalities. 2nd VALIDATION with Company Managers
3	Design of the training plan.	Training plan: Structured, integrated, validated.	Design the general configuration of the training performances, setting priorities. Write the specifications for each performance. Evaluate their feasibility, coherence and acceptability. 3rd VALIDATION with Company Managers

jobs...) they are facing or are going to face and examining with the interviewees the training component of the situation. Only after this analysis will we be able to identify the vocational training needs.

- We have 3 valuable sources from which to identify the training needs:

    a) The usual problems or malfunctions found by the company.

    b) The projects (investment, organisation, commercial development, technological innovation...) that will be carried out.

    c) The content of the "present jobs" and their anticipated evolution.

In the framework of the Quaternaire methodology, the survey of professional training needs should always be done in the framework of the particular and specific situations that are happening within the company.

As we can see below, the application of the Quaternaire methodology has links to the TP project methods, some of the main intervention criteria are:

- Private interviews with key company informants (CEO, managers, middle managers, etc.).
- Documentary review of the sector we are working on (the sector´s growth scenarios, new projects or markets in which the company will be involved, etc.).

In other aspects, the methods are quite similar and the rest of the handbook will mainly deal with issues that can be used in either method.

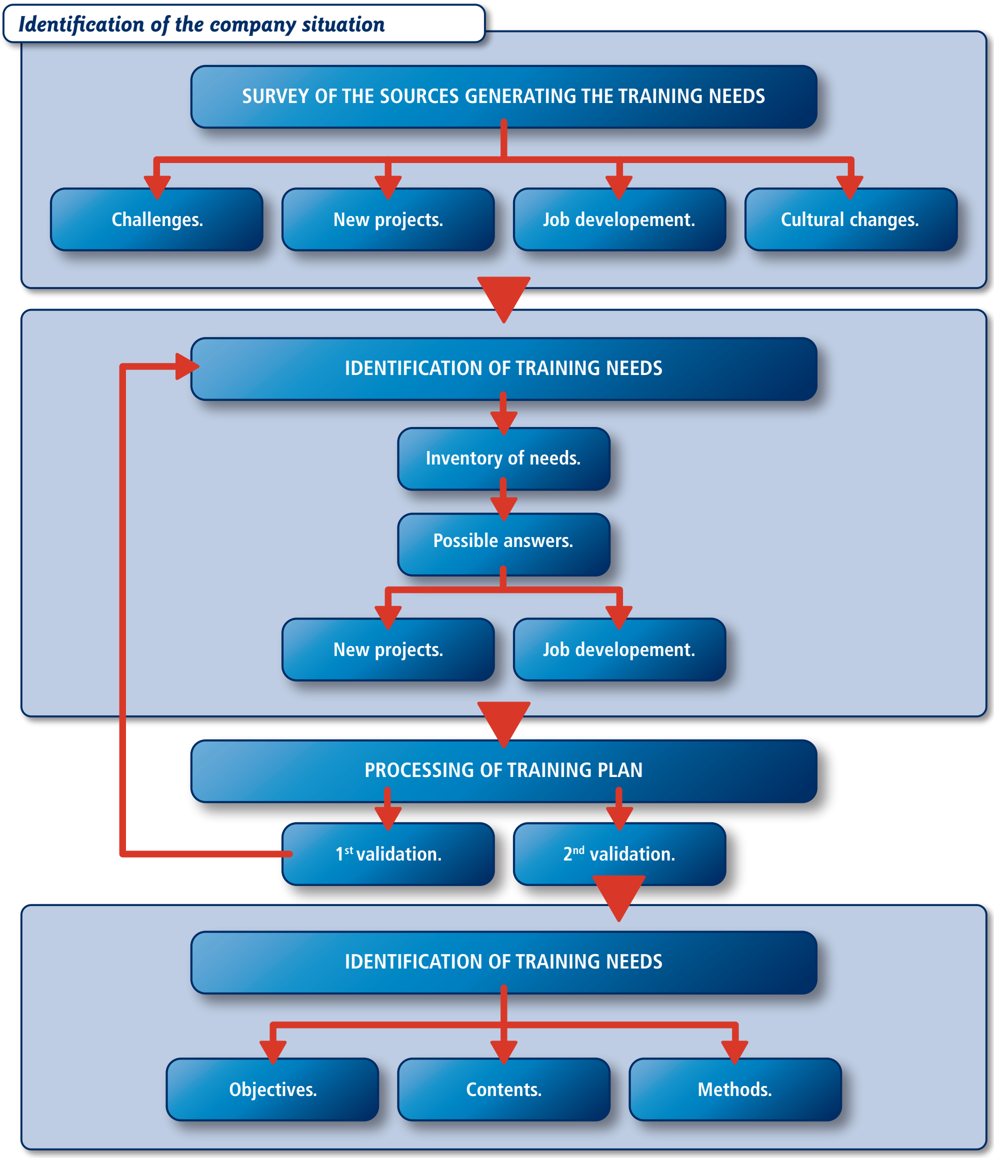


Figure 6. Performance Diagram in the Implementation of Quaternaire methodology for training needs assessment (TNA).

4.5. Tools and sources in the needs assessment

The TNA tools and sources that have been the most useful in the TP project are the review of documents, interviews and focus groups.

4.5.1. Documents

The TP process can include a review of the following document types:

- Strategy and goals
- Laws and regulations
- Job descriptions/competencies definitions
- Performance appraisals (the training part)
- Employees surveys
- Customer service surveys
- Complaints
- Statistics: Accidents, absence
- Exit Interviews

The aim is to look for new challenges that require new or better training activities.

4.5.2. Interviews

Interviews have been useful in TP, especially with the CEOs, HR manager and middle-managers. In small SMEs (microbusinesses) only the CEO may be available as an information source. Interviews are very useful when establishing relationships between the TP and the managers. Interviews have both advantages and limitations (Table 6).

Table 6. Advantages and disadvantages of the interview procedure

INTERVIEW ADVANTAGE	INTERVIEW LIMITATIONS
Used at the beginning of the analysis establishes trust.	Time consuming.
Enables probing for the meaning behind answers and statements.	Costly in resources.
	Requires a skilled and experienced facilitator.
	Some repondants can hesitate to share their opinions.
	The data analysis requires skills and experience in training planning.

4.5.3. Focus groups

The TP method that has yielded the most useful information is focus groups. Focus groups have been conducted among managers and among employees. Experience has shown that in the majority of cases "homogeneous" focus groups, either with employees or managers, have given the best results.

4.5.3.1. What is a focus group?

A focus group is a qualitative research method in which a group of people are asked about their opinions, thoughts, perceptions, beliefs, and attitudes towards a product, service, concept or idea. A focus group in TNA is a group of employees invited to share their thoughts, feelings, attitudes and ideas on training and performance within the company. Approximately 6-8 people are selected according to specific criteria - e.g. age, gender and years on the job. The appropriate time for running a focus group is 1 to 1.5 hours.

4.5.3.2. Advantages and limitations of a focus group

Focus groups have both advantages and limitations (Table 7):

Table 7. Advantages and limitations of the focus group procedure

FOCUS GROUP ADVANTAGES	FOCUS GROUP LIMITATIONS
Rather easy to get together.	Requires a skilled and experienced facilitator.
Efficient way to involve many individuals in training planning, getting valuable data in participants' own words and encouraging buy-in.	Dominant members can skew the discussions.
Employees can build and reflect on each other's responses and come up with ideas they might not have thought of in an interview.	Some respondants can hesitate to share their opinions.
Good for getting data from employees with low levels of literacy.	The data analysis requires skills and experience in training planning.
Participants can mirror their responses on one another - identifying factual errors or extreme views.	

4.5.3.3. Preparing for the session

For a focus group to be successful, solid preparation is important. Invite 6 to 8 employees to participate in a meeting about 1 to 1.5 hours long. Select employees with different backgrounds with regards to age, years within the company, gender and those who are likely to be participative and reflective. Sometimes it is useful to e-mail the invitation with the questions. Prepare the agenda: welcome, review of agenda, review of the meeting goal, review of basic rules, introductions, questions and answers and wrap up. For a focus group lasting approximately 1 – 1.5 hours, five key questions are appropriate. If the focus group consists of employees then brief their managers (middle managers) about the importance of the focus group and let them also prepare and "ignite" the group before the meeting. Participants without prior information will not contribute to useful results.

4.5.3.4. Running a focus group

1. Welcome people as they arrive and make them feel comfortable e.g. by mingling with participants.
2. Introduce yourself and the co-facilitator, if used.
3. Present the goal of the meeting and the agenda.
4. Have the participants introduce themselves and briefly describe their job.
5. Encourage honest discussion on the relevant issue.
6. Assure the participants that the results will be reported collectively and anonymously in a final report to the company.
7. Start with easy questions as a warm up, e.g. questions about the job.
8. Ask open questions and take notes.
9. After each question is answered reflect back a summary of what you heard.
10. Phrase topics in terms people are familiar with – avoid professional "jargon."

11. Let participants know that their contributions are important.
12. Avoid taking sides, don't get upset, and act professionally.
13. Keep the session on–track, follow your script/ agenda and manage the discussion. Do not allow side discussions to take place.
14. Invite contributions and avoid having one person talk all the time.
15. Provide paper, pens and flip charts to help promote discussion if necessary.
16. Summarize the discussion and wrap it up.

4.5.3.5. Possible challenges in running a focus group

Running a focus group is not an easy task and challenges may emerge. Some solutions have proven to be useful in the Icelandic TP project (Table 8).

Table 8. Potential challenges in running a focus group

CHALLENGE	SOLUTIONS
Dominant participant/s.	Invite each person to speak in turn.
Quiet participant/s.	Ask participants to think about an issue for a few minutes and write down their responses. Note the responses on a flipchart/whiteboard.
Personal confrontation.	Try to avoid personal confrontation. Ask if others in the group agree.
Complaints (non-solution orientated).	Try to avoid listening to (or discussing) complaints which are not solution oriented. Stress, in a gentle way, the search for solutions, improvements of situations with training or other solutions etc.

4.6. Key success factors of an effective TNA

Table 9. Key success factors of an effective TNA

Easy to conduct.	Buy- in and participation (managers, executives/CEO, HR, employees).	Evaluation of enablers and barriers.	Proactive solutions.
Not too time consuming.	Aligns to strategy and culture.	Suitable tools.	Action plans (for organization, department or individual).
Good communication with managers and employees throughout the whole process.	Various resources.		

4.7. Four types of needs

The TNA results often compile four different training needs: Rollout, problems, people development and strategy development. The suggested training and learning solutions have to align to each need.

4.7.1. Rollout

The organisation is introducing something new, like new or updated information technology, new work procedures or new philosophy.

4.7.2. Problems

The TNA often sheds light on the causes for various problems. These can be customer complaints, drop in sales, accidents, communication problems etc.

4.7.3. People development

Here the organization wants to enhance the competencies of groups and individuals. For example help the employees deal with changes, new assignments, encourage innovation etc.

4.7.4. Strategy development

An important role in human resource development is to help the organization facilitate the implementation of the company's goals and values.

5. Solutions – Matching Methods with Outcomes

Key topics covered in this chapter

- *Courses, internal and external*
- *On-the-job training (OJT)*
- *Mentoring*
- *Job aids/guidelines*
- *Job rotations*

The methods used for performance improvement have to match the outcomes of the TNA. These can be both informal and formal learning actions. When preparing a training action the plan (see appendix 1 and 2) can include the following components:

1. Justification of the training action.
2. Impact expected.
3. Operational objectives.
4. Contents.
5. Period/place where competences are acquired.
6. Target group.
7. Guidance linked to the performance and organization methods.
8. Training companies recommended.

9. Modality.
10. Methods.
11. Assessment modalities.
12. Impact indicators.
13. Budget estimation.

Many methods are being used for improving performance in the workplace for example, courses, on the job training, mentoring, job rotations and job aids. These methods can include both formal and informal learning. For successful results they have to be carefully instructional designed and fit the goals and the audience.

5.1. Courses

For years, planned learning interventions, instructor-led courses, internal or external, have been a common method for boosting performance in the workplace. Courses can be designed and run within the company using employees as instructors which can often serve as development for them. The organization can also buy the course from an outside provider.

5.1.1. Course methods

Courses can vary in content and methods. They can be delivered in classrooms as well as electronically. Course methods can consist of lecturing, demonstrations, discussions, role plays, case studies, videos/movies, group work, individual assignments etc. Table 10 gives the definition of each course method component and when applicable.

Table 10. Course methods

METHOD	DEFINITION	APPLICABLE
Lecture:	Presenting the content of the course. Lecture can be primarily one-way from the instructor to the learner or having the learners pariticipate through questions and discussions.	When providing new information and knowledge.
Demonstrations:	Showing the optimal skills or behavior.	When the learner needs new skills or behaviors.
Role play:	Acting out situations that the participants play spontaneously.	When training interpersonal and communication skills.
Case study:	Analysing situations/cases and developing solutions from the questions provided.	When training the ability to analyze situations and make decisions.
Videos/movies:	Showing real events or situations.	When addressing both new issues and issues known in some way to the participants.
Group discussion:	Members of the group discuss a given topic.	Assisting the learners in applying what they learned on the course.
Group projects:	Learners work in teams to apply the content and concepts in the course.	Assisting the learners in applying what they learned on the course.
Inividual projects:	The individual learner gets an assignment to apply the concept and content of the course.	Assisting the learners in applying what they learned on the course.
Self discovery:	The learners discover the content and the concept of the course using many techniques such as documents, and guided assignments.	Assisting the learners in learning and applying the content of the course.

5.2. On-the-job training (OJT)

5.2.1. What is on-the-job training?

On-the-job training (OJT) is a widely used method especially in small businesses. It supports performance on the job and focuses on skill development. More experienced employees train less skilled and unexperienced ones. The method can be informal when it has not been prepared and the trainers have no training in how to train others. Learning occurs outside planned learning interventions. Or it is formal and consists of four steps: Prepare, present, try out and follow up and the trainers are trained. When OJT becomes formal and builds a relationship between a more and a less experienced partner it becomes mentoring (see chapter 6.3)

5.2.2. Why on-the-job-training?

In OJT the employee learns in authentic situations that will make transfer to their performance easier. Compared to other methods OJT often needs less investment in time and money for instructional materials and trainers' costs.

TP experience and research have shown that informal OJT can have disadvantages. Managers and employees can provide wrong training and pass on bad habits and attitudes. Constraints like time and lack of company commitment can hinder OJT. Therefore many companies choose more structured approach like mentoring, especially for new employees.

5.3. Mentoring

5.3.1. What is Mentoring?

Mentoring is a valuable tool for Human Resource Development through relationship-building between a more and a less experienced partner. Its purpose is to efficiently pass on personal and professional knowledge and experience. The two parties involved are called “Mentor” and “Mentee”.

The mentor, as the more experienced partner, takes on the role of the adviser or consultant. In a dialogue process with the mentee, the mentor passes on his/her advice and supports the mentee (on a meta-level) regarding specific tasks, general issues or development processes.

Mentoring is similar to coaching; however, in this type of relationship, neither the mentor nor the mentee are trained coaches or need special skills except their personal and/or professional expertise.

Mentoring has become popular in business contexts and is recently being applied more broadly in many different areas.

Table 11. Some benefits of mentoring for mentors and mentees

MENTEES’ BENEFITS	MENTORS’ BENEFITS
Receive more knowledge and experience.	Learn about new methods, approaches or tools.
Get advice and hints on tasks, training/education and/or career development.	Possibility to improve results (which may also benefit the organization/company).
Discuss professional and personal development with a more experienced counterpart.	Help to increase staff qualification and personal development.
It is encouraging to be supported by a more experienced person.	It is stimulating for a mentor to pass on experience and receive recognition.
Become more efficient/confident through taking on useful advice.	Opportunity to discuss new ideas and forms of doing something.
Broadening the personal/professional network.	It trains the social and communicative competences of the mentor and enhances self-reflection.
Receiving an outside opinion and being able to take on other viewpoints.	The mentee may give the mentor a fresh look (on established viewpoints, processes or procedures).

5.3.2. Why mentoring?

It may seem that mentoring primarily benefits the mentee, since he/she receives knowledge and experience from the mentor. A profound analysis of what happens in such a matched relationship however shows that both parties equally gain advantages and benefits (Table 11).

These arguments display very well that mentoring indeed benefits both participating parties. Some of the points listed above evidence that beyond the individual benefit, the organizations profit as well from this process. Mentoring therefore also contributes to the organizational learning and development. This explains why companies may agree on mentoring pairs beyond company borders.

5.3.3. Implementing a mentoring process

Mentoring pairs may be created by chance. However, they can also be fitted together formally in order to support knowledge and experience transfer in a specific situation. A common example for the latter is when experienced managers become mentors for young trainees. This would be an example of an individual mentoring-match. Other examples for forms of mentoring are: Team-mentoring (1 mentor for a whole team), Cross-sectoral-mentoring (mentor from one sector, mentee from another; to increase competencies in another area), e-mentoring (a mostly online based process), etc.

Mentoring can be – but does not necessarily have to be – a structured process. When implementing mentoring in a formal manner within a company (or when reaching out to other companies), it is advisable to create mentoring guidelines. The purpose is to agree on important issues and provide a framework for the process.

The topics to be clarified in the guidelines/framework should be:

- Matching/selection of pairs
- Duration of the process
- Frequency and/or number of encounters
- (Desired/specific) aims of the programme
- Confidentiality agreement (esp. important for cross-company pairing!)

Furthermore, it needs be taken into account that homogeneous mentoring pairs (within the same company/sector) have a different character than heterogenous (from other companies/sectors) set-ups. Mentors from external entities may help to broaden the general vision, whereas internal mentoring pairs may be easier to establish and can provide insight on internal historic development. Nevertheless, both will be able to share their more experienced viewpoints.

5.3.4. Mentoring to support training activities

Overall, mentoring is a good and effective tool to increase the impact of training actions. The personal relationship between mentor and mentee can provide additional space to reflect and deepen the learning experience. It can link the acquired knowledge with business practice and be helpful for designing a better personal and/or professional development plan for the mentee.

5.4. Job rotation

5.4.1. What is job rotation?

Job rotation is a type of business strategy that allows for the movement of employees from one position to another, usually following some sort of logical progression that aids employees in developing skills and attributes that ultimately benefit the business. Often used as part of a cross-training program, the idea is to help the business create a pool of qualified employees who are capable of fulfilling more than one function within the company structure. Employees benefit from this arrangement by becoming more familiar with the overall business operation, and over time qualifying for positions that may offer more in the way of salary or wages and other benefits.

With job rotation, the idea is to expose employees to a wider range of functions within the business and make it possible for those same employees to become proficient in performing in several different roles. Programs of this type can provide both immediate and long-term benefits for employees. In the short-term, employees who are usually assigned duties that are somewhat repetitive may be provided with the opportunity to do something different. This in turn helps to reduce the incidence of boredom on the job that can sometimes have an adverse effect on productivity. At the same time, the employee is likely to feel a sense of pride in being selected for the cross-training, perceiving the job rotation as a vote of confidence on the part of the employer.

Sometimes referred to as a dual-edged sword helping unemployed people into employment and up-skilling employees at the same time, job rotation is sometimes thought of as a multifaceted diamond supporting a range of social inclusion and employment initiatives at the same time.

The term 'Job rotation' denotes a scheme, a technique and a sophisticated instrument for investing in human capital. As its name implies, Job rotation permits rotation between employment and training. The main idea is to provide an employee with the opportunity of temporarily leaving his post for training without causing any major disturbance in the production.

5.4.2. Why job rotation?

A successful Job rotation project can effectively help many groups at the same time, following are some examples:

- Enterprises: Increased competitiveness; Well-trained personnel; Recruitment possibilities; Targeted cooperation with training providers and labour market authorities
- Employees: Updating and intensifying knowledge; Job security; Career perspectives and increased motivation
- Substitutes (Unemployed people as replacement workers): Training and employment opportunities; Work practice and opportunity to find a job; New contacts; Updating and intensifying knowledge; More self-confidence
- Society: Lifelong Learning; Possibility of maintaining jobs and creating new jobs; Sustainability and learning regions
- Training providers: Market knowledge; Targeted cooperation with enterprises; Exportable services

5.4.3. Different models of job rotations

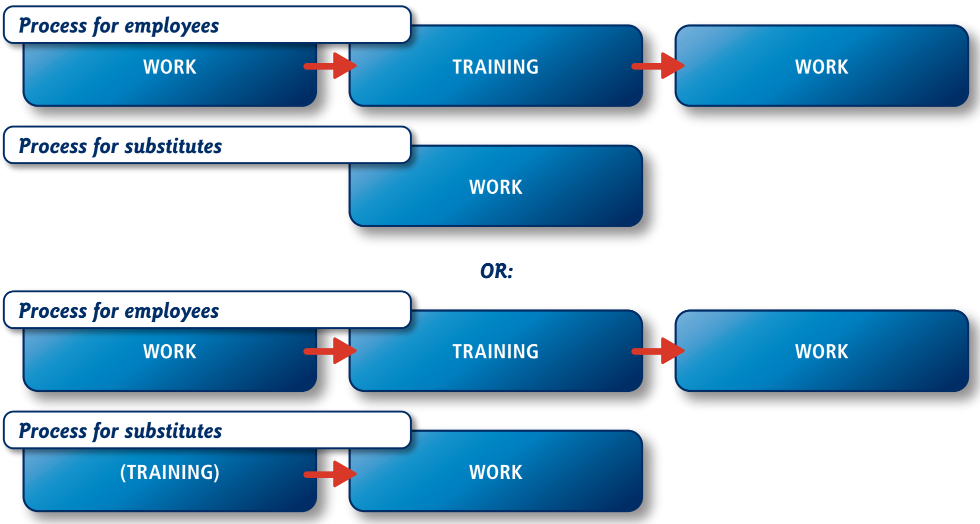


Figure 7a. Simple job rotation model.

Figure 7b.
A more complex job rotation model.

There are many different models of job rotation, one definition is unemployed or less skilled employees receive training and the opportunity to experience the world of work, whilst releasing employees for up-skilling and training.

Research shows that at the end of their time in a job rotation project unemployed people often gain employment or move into a local job bank. In any case their employability is greatly increased and so is their motivation and self-esteem. Page 51 shows an example of a simple job rotation model (Figure 7a).

However, they can be more complex (Figure 7b)! And they can involve many local employers like the one on opposite page (Figure 7c)!

You should not be afraid to experiment, why not try and design your own model to fit your local environment?

5.5. Job aids

5.5.1. What is a job aid?

Job aid is performance support. It directs and guides the employee in his/her job. Job aids are information, processes or perspectives.[16] Job aids can for example be in the form of instruction cards, wall charts or flow charts and allows the employee to quickly access the information he or she needs to perform a task.

The job aids walk the user through a series of steps about how to perform certain tasks. Job aids range from covering simple step-wise processes to more complex decision-making or conducting calculations. Job aids can be on paper or

[16] Rossett & Schaffer (2007).

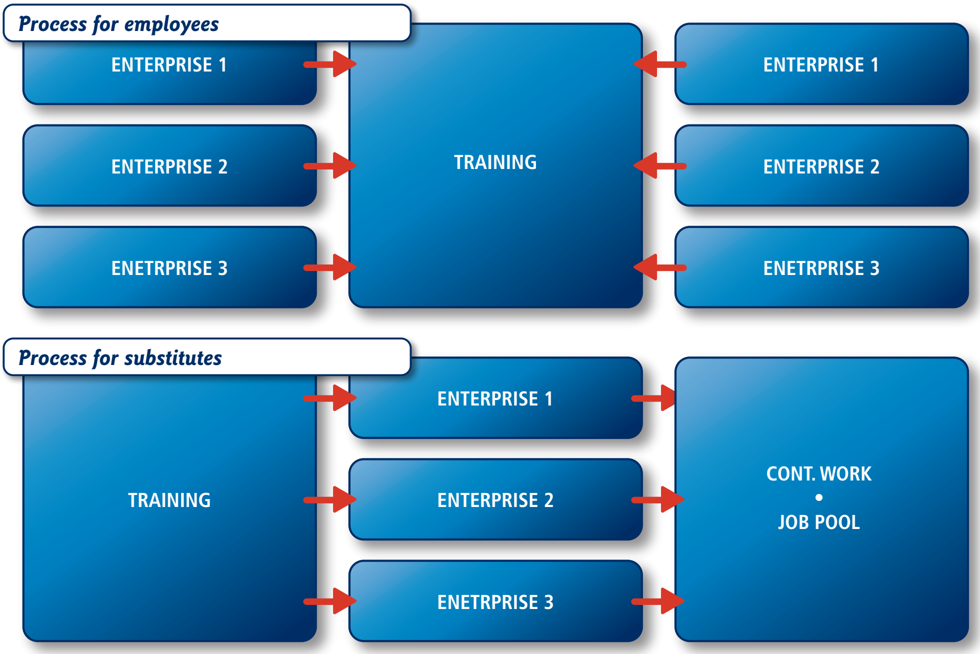


Figure 7c. Job rotation model involving several enterprises.

electronically accessible on the computer or the phone. It can be prepared by experts or employees.

5.5.2. Why job aids?

Sometimes the employee needs support and guidelines here and now. Instead of finding somebody to assist, job aid allows the employee to quickly access the information he or she needs to perform a task where and when needed. This will enhance the employee's responsibility for their own performance and save time.

Job aids can be helpful in varible situations as how to use a new IT system by guiding through procedures or processes step by step, collecting facts about certain issues or provide suggestions. The TP project has shown that job aids can be used to a greater extent and more effectively in training and prevent performance gaps.

See examples of job aids: http://jobaids.info

6. Evalution: Return on Expectations

Key topics covered in this chapter

- *The purpose of evaluation*
- *Return on Expectation (ROE) defined*
- *Why ROE?*
- *Measurements*

6.1 The purpose of evaluation

Organizations all over the world are investing millions in training programs. The estimated spending on training and learning in organizations regardless of industry, size or location is 2% of the total payroll.[17] Therefore it should be expected that the outcomes are measureable. The purpose of evaluation is to measure the impact the training or learning has on individual performance in the workplace and the contribution this makes to overall organizational results. The evalution can be both subjective such as interviews and discussions and objective for example surveys and figures.

6.2. Return on Expectation (ROE) defined

Return on Expectations (ROE) is a tool for measuring the bottom line value of training and learning in organizations. It is designed and executed in partnership with the people within the company who will determine training/learning's value. The outcome/expectation of training is decided before the training solutions take place that is in the

[17] ASTD.org

Table 12: The four levels of the Kirkpatric model

LEVEL	DESCRIPTION	FACTORS AFFECTING THE OUTCOME	POSSIBLE MEASURES	MEASURES USED - INSTRUMENTS
1. Reaction:	How did the employees like the training?	Perceived match between training and trainee expectations.	Post or during training surveys.	• Questionnaire. • Individual responses. • Follow –up interviews. • Employee surveys.
2. Learning:	Did the trainees learn what they were supposed to?	• Trainee readiness and motivation for the course. • Material and content. • Trainer.	Pre- and post-tests, scenarios to be solved.	• Tests. • Role plays. • Case studies.
3. Performance /behavior:	Transfer of training to the job: Do the employees apply on the job what they learned?	• Solid TNA. • Managers commitment to training. • Opportunity to apply training on the job.	Improved job performance (more quality in production of specific products or services, reduced mistakes).	• Performance records. • Complaints. • Quality check. • Interviews. • Observation. • Supervisors estimates.
4. Results:	Did the training affect the strategic results?	• Employee performance. • Internal environment of the organization. • Policies, procedures, systems.	• Increased market share. • Returning customers. • Reputation.	• Customer survey. • Balance sheets.

analysis phase. The trend in human resources and training today is that analysis and evaluation are converging.[18] The ROE model has proved to be the most used evaluation model in the TP project.

The ROE model is based on the famous Kirkpatric[19] model which has been widely used in evaluating training and development for decades. The Kirkpatric model has four levels shown in Table 12.

[18] Rossett (2009).
[19] Kirkpatric & Kirkpatric (2006).

6.3. Why ROE?

Through the years learning and training professionals have focused most of their efforts on training events (Levels 1 and 2); however, the largest ROE occurs at Level 3, on the job. For maximum ROE, TP needs to partner with managers on the outcome of training. Therefore it is important to ask for both the managers' and employees´ expectations before training solutions take place.

When managers and employees are asked for their expected outcome from the training the most common answers are the following ones:

- More competent employees
- Improved work methods and processes
- Improved customer satisfaction
- Improved employee satisfaction
- Increased sales and economic turnover
- Minimal mistakes
- Minimal complaints

Figure 8. Similarities between ROE and Balanced Score Card.

Similarities between ROE and Balanced Score Card

HUMAN RESOURCES	PROCESSES	CUSTOMERS	FINANCE
More competent and confident employees. Employees integration to company culture. Employee satisfaction. Improved cooperation between divisions. More systematic new employee training.	Improved work methods and processes. Improved quality. Improved follow-up on training and performance.	Improved customer satisfaction. Minimal mistakes.	Competitive advantage. Less staff turnover. Increased sales and economic turnover.

Figure 8 shows an example of how the Return on Expectations of the managers and employees fits into the Balanced Scorecard (see chapter 2.3.)

In the training plan the expected outcome is presented as well as the measurements. See an example of a training plan in appendix 1.

6.4. Measurements

In the TP, many companies already have some of the measures needed for showing if their expectations were met. These are objective measurements like customer service surveys, employee surveys, for example questions on training and competencies, absenteeism, sales figures, customer complaints etc. or subjective measurements like interviews, performance reviews or observations (Table 13).

As previously mentioned for the ROE it is important to ask both managers and employees for their expectations in the analysis phase.

Table 13. Expectation and outcomes for one TP project

EXPECTATIONS	RETURN ON EXPECTATIONS A YEAR LATER
Improved quality in cleaning.	Standardized procedures in cleaning.
Customer satisfaction.	Fewer customer complaints.
Employee integration into company culture.	On-board process more effective.
Competitive advantage.	The company among the 20% of Icelandic companies succeeding in spite of the 2008 economic crisis.
Employee satisfaction.	Employee turnover remains low.
	Increased economic turnover.

Synopsis

To sum up, the training process is an on-going process with four steps: training needs assessment (TNA), training solutions, implementation and evaluation. The TP project as implemented in the partner's countries has revealed that is a practical and powerful way to analyse training needs. It thereby increases substantially the likelyhood of providing relevant training solutions in SMEs and thus, hopefully, increases markedly the competiveness of the companies.

Glossary

Attitude: Beliefs, opinions and expressions of favor or disfavor toward a person, place, thing, or event that support or prevent behavior.

Competencies: Knowledge, skills, attitudes, behavior and personal attributes someone needs to be competent at their job and successful in performing job related tasks.

Exit interviews: Formal feedback from an employee who is leaving their job about what the organization can improve.

Focus group in TNA: Focus group in training needs assessment is a group of employees invited to share their thoughts, feelings, attitudes and ideas on training and performance within the company.

Job aids: Job aid is performance support. It directs and guides the employee in his/her job.

Job rotation: Allows for the movement of employees from one position to another, usually following some sort of logical progression that aids employees in developing competencies.

Knowledge: Knowing something with familiarity gained through experience or association (adapted from Webster dictionary)

Learning: Knowledge, skills and attitudes acquired by instruction or study and how this changes the individual in some way.

Mentoring: More experienced employee or manager helps and supports less experienced employee or manager to build expected job competencies and results and achieve his/her carreer ambitions.

Mission statement: States why the organization exists.

Performance appraisals: Formal discussion between manager and employee of an employee's performance of assigned duties, responsibilities, expectations, training and development needs etc.

Return on Expectations (ROE): A tool for measuring the bottom line value of training and learning in organizations. It is designed and executed in partnership with the people within the company who will determine the training/learning's value. The outcome/expectation of training is decided before the training solutions take place.

Skills: Being able to perform a task, not just knowing how to do it.

Strategy: Describes the result aimed at and how it should be accomplished.

Strategic Human Resource Development (SHRD): Human resource and learning related actions that an enterprise takes to achieve its business strategy.

Training needs assessment (TNA): A systematic method for determining what caused performance to be less than expected in order to make effective decisions or recommendations about what should happen next. Sometimes the recommendations involve training; sometimes not.

Training: The systematic process of providing an opportunity to learn knowledge, skills, attitudes and behavior for current or future jobs. It forms a part of the organization's performance systems and continuous quality improvement.

Values in organizations: Important beliefs or ideals the organization stands for.

Resources

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Videos on focus groups

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http://www.youtube.com/watch?v=WVoqALWPiV0&feature=related

Appendixes

Appendix I

Excerpt from a Training Plan. Iceland:

NEED /GOAL	AUDIENCE	SOLUTION	TIME	INSTRUCTOR	PRIORITY	RESULTS/ MEASUREMENTS
To know First Aid basics and be able to react to accidents in a right way.	All.	Standard course.	Spring 2011 and every third year.	Red Cross.	Employee safety.	Right reactions to accidents. >4,2 employee satisfaction.
To realize the importance of clean care on the job and be clean and tidy on the job.	Production.	Tailored course covering the danger and paths of infections in the production and the importance of clean care on the job. Job aid/ checklists on clean care requirements.	Spring 2011.	Sýni and Tandur.	Clean care.	Managers' performance assessment. Improved product quality. >4,2 customer satisfaction. on products. >4,2 employee satisfaction.

Appendix 2

Excerpt from a Training Plan, Spain:

PRIORITY	TITLE OF THE TRAINING ACTION			ACTION NO:
Relevance justification of the training action:				
Impact expected:				
Operational objectives:				
Operational objectives:				
Hours:		Period in which the competences are acquired (during training, on the job etc.:		
Target group:				
Guidance linked to the performance and organization methods:	Training company recommended:			
	Modality:			
	Methodology:			
Assessment modalities:				
Impact indicators:				
Estimated budget:				