

Technical Note #3

Workplace needs assessment:
What, why, who, how

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CONTENTS

Background	1
<u>What</u> is a "WNA"?	2
<u>Why</u> do a WNA?	2
<u>Who</u> would conduct it?	2
<u>How</u> do a WNA? (What steps are involved?)	3
How does a WNA differ from other types of assessments done in workplace education programs?.....	4

Background

As shown in Technical Note #1, "Collaborative Learning for Continuous Improvement: An Introduction," a workplace needs assessment (WNA) is the first major activity which an education planning team would undertake when planning a workplace education initiative.

This Technical Note presents an overview of the "what, why, who, and how" of a WNA. For more-in-depth guidance, the reader is referred to Collaborative Needs Assessment: A Handbook for Workplace Development Planners by Sue Folinsbee and Paul Jurmo (Toronto: ABC CANADA, 1994).

What is a "WNA"?

A workplace needs assessment (WNA) is a systematic way of identifying workplace basic skills needs.

It identifies those organizational needs that might be met through educational activities and those that need to be addressed through other changes in organizational policies and practices.

In particular, it documents where basic skills-related activities are needed.

Why do a WNA?

By specifying a range of educational, training, and other organizational development activities which an organization might undertake, a WNA ensures that realistic expectations are set for educational activities.

That is, rather than assume that a single basic skills or other activity can by itself meet all of an organization's needs, stakeholders will have a clearer picture of what role education can reasonably play.

A WNA can also identify organizational needs which can become topics for basic skills and other education and training activities.

A WNA can also build awareness, ownership, and support for an educational initiative among all levels of the workforce.

Who would conduct it?

A WNA would be the first major activity conducted by an organization's education planning team. Such a team would oversee not only the WNA but all other components of the education program and related organizational development activities. This team would be composed of representatives of key stakeholder groups: workers, managers and supervisors, unions, and education providers.

How do a WNA? (What steps are involved?)

To plan and conduct a WNA, an education planning team would:

1. Develop a goal statement for the WNA. Clarify what the team hopes to achieve by conducting a WNA. (See "Why do a WNA?" above for possible purposes.)

2. Clarify what information the team wants to collect.
Typically a WNA tries to answer these kinds of questions:

1. What kinds of changes are going on in the organization which indicate that there might be a need for a basic skills initiative?
 - a. How have work processes changed?
 - b. How has equipment changed?
 - c. What if any new safety or industry regulations is the organization responding to?
 - d. How has the workforce changed?
 - e. Do employees need to upgrade their communication, thinking, and problem-solving skills to respond to those changes? If so, give examples of areas in which employees appear to be having problems.
 - f. Do employees recognize these as problems, or is this primarily a management-level concern?

2. What might the organization do to enable all employees to further develop and use the knowledge and skills they need?
 - a. What is the organization currently doing to help employees respond to these changes?
 - b. What are employees themselves doing to respond to these changes?
 - c. How might those existing upgrading efforts be improved?
 - d. What other upgrading initiatives might be introduced?

3. Decide where you'll get your information and design information-gathering activities. WNAs typically use interviews, focus groups, and possibly questionnaires to collect the information they need from a representative sampling of the various stakeholders represented in the organization (and

of the education planning team). Information might also be gleaned from various documents (e.g., annual reports, strategic plans, and education and training records) and through observation of workplace and education/training activities. Help the team decide how it will collect the desired information from those sources. Field-test your activities and refine them.

4. Collect the information you need using the activities you designed.
5. Organize and summarize the information collected.
6. Analyze that information and prepare a report with recommendations.
7. Present your report and agree on actions to take.
8. Prepare an action plan and follow up to ensure that actions are taken.

How does a WNA differ from other types of assessments done in workplace education programs?

Until recently, "assessment" in workplace basic skills programs has tended to follow a model developed in school ("academic") settings. In this academic model, assessment focuses solely on the individual and tries to determine the individual's ability to perform certain tasks.

A WNA broadens the focus of assessment to include the organization within which the individual (in this case the worker-participant) operates. A WNA assumes that a healthy organization requires continuous improvement (change) by not only individual employees but also by other stakeholders in the larger organization.

A WNA is a procedure for assessing the organization's ability (readiness) to effectively use the knowledge and skills of its workforce. When combined with assessment of individual workers' abilities, a WNA can give a comprehensive picture of what the organization and the individual workers need to do to meet their goals for continuous improvement.