

A New Approach to Assessment of Training Needs

Identifying needs to create meaningful
training opportunities

2025
WINTER
TRAINING
CONFERENCE

"BUILDING TOWARDS TOGETHER"

www.nascsp.org

Learning Objectives

Effectively identify the
need

Gathering different data
during assessment

Considerations for
designing a training plan



Effectively identifying the need

The Results Oriented Management and Accountability Cycle

Assessment

Needs and Resources



Evaluation

Analyze data,
compare with
benchmarks



Planning

Use assessment data and
agency mission statement
to identify results, and
strategies



Achievement of Results

Observe and report
progress



Implementation

Strategies and
services






Assessment

- **A Community Needs Assessment (CNA)** is a systematic process for **creating a profile** of a given community or target population by identifying challenges, and existing resources.
- The **CNA** includes analysis of the data collected
 - Identifying where there is a lack of services or supports to address needs
 - Prioritizing the importance of what we see



Assessment

- A **Training Needs Assessment (TNA)** is also a systematic process that identifies gaps between what exists and what should be.
- The **TNA** includes analysis of the data collected
 - Identifying disconnects between knowledge, skills or competencies documented for staff current performance and what is required to achieve the organization/network's objectives.



Why might we want to do this kind of assessment?

- Data collection is inconsistent and possibly unreliable
- Responses are not comprehensive or representative
- Agencies not meeting outcome targets
- Not meeting organizational standards
- Staff do not demonstrate a results orientation or data-centric culture
- Poor morale
- High turnover
- Staff unable to provide clear understanding of outcome/output connections during monitoring visits or audits

Typical
survey:
“Check all
the topics
that you
need
training on.”

- This approach to data collect will produce results that are too broad!
- We keep providing trainings on “Analysis”, yet “Analysis” continues to be the most requested training topic.
- And no measurable improvements have been observed related to this topic...
- What are we missing? Why does this negative loop continue to occur?



Without correctly identifying the need...

- We may use the wrong intervention,
- Which means resources and time are wasted,
- And the need doesn't get addressed,
- And the situation can get worse,
- And we keep repeating the same process hoping for a different result!



Identifying the
Need...


Who is the population in need?

- The full CAA network?
- A specific region or State?
- A local Community Action Agency?
- A certain department?
- Individual staff?





Don't
assume!

- We know that all communities are different and even under a large domain area, like housing or employment, the specific needs are different.
 - The same holds true for our organizations!
 - Don't assume that all employees need the same training!
- 

Training Needs Assessment Levels

01

02

03

Organizational Level

01

Evaluates the company's strategic goals to determine where training can enhance overall performance.

Occupational Level

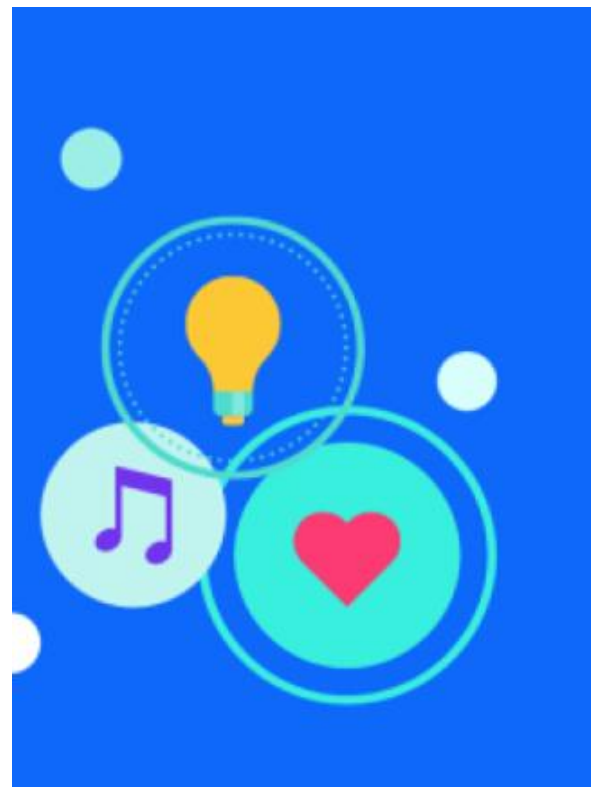
02

Identifies the specific skills and knowledge needed for effective performance in particular job roles.

Individual Level

03

Assesses each employee's unique training needs based on their performance, feedback, and career goals.



Gathering Data for Training Needs Assessments

What do we want to know?



What is the need?



Who has the need?



What is the best way to respond to the need? (training? TA? Other?)



When are multiple responses needed? (training and technical assistance?)



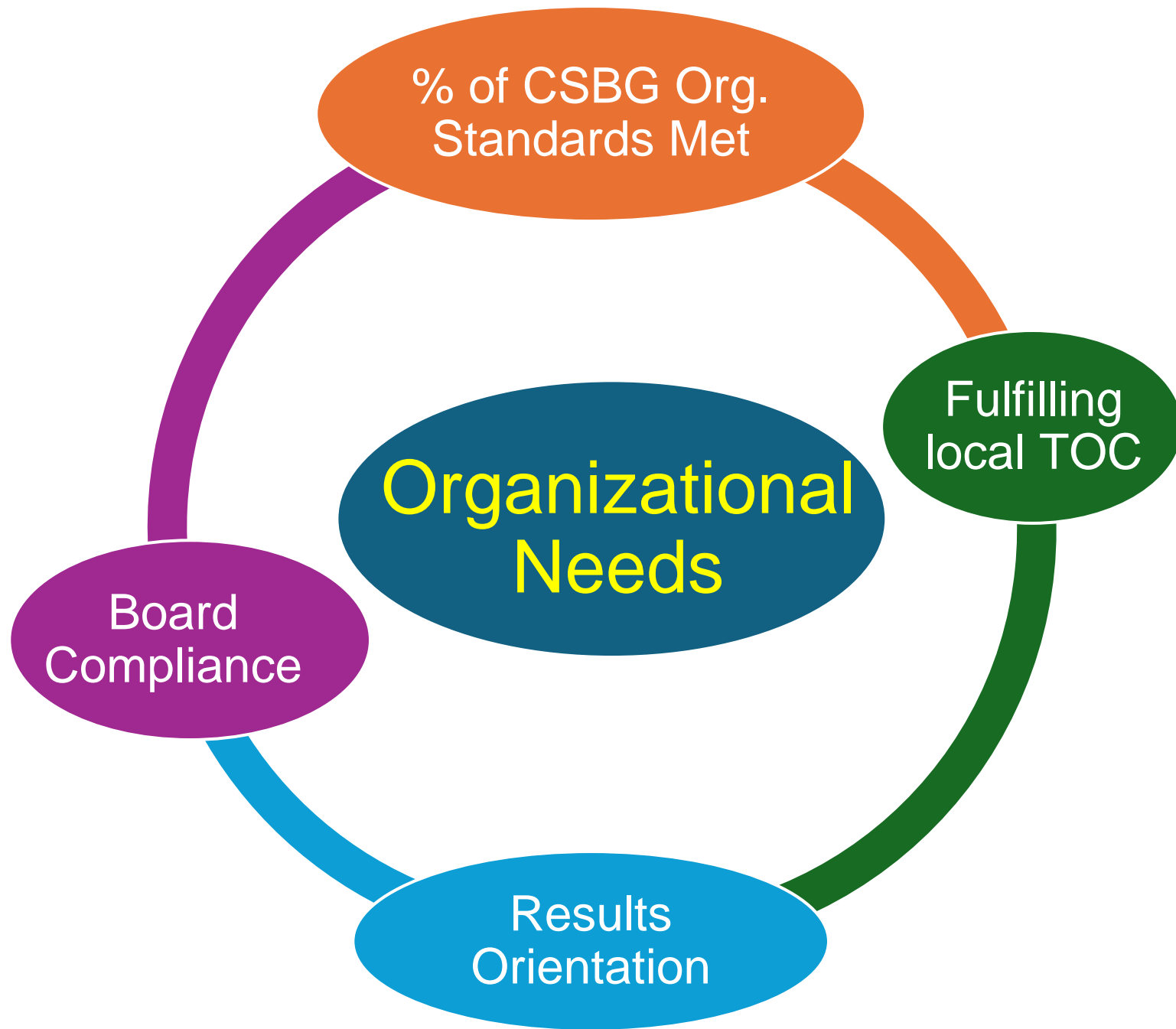
How should we follow up and offer support?

Some basic data to start the profile

Once you determine the target population, you will start to build a profile with some common data.

If it is agency level profile, data can be organized around performance measures.

If it is at state or regional level, a system of aggregating the data will have to be established first.



Where is our
overall
performance
compared to
where we want
it to be?

Data sources: Organizational Needs

- Organizational standard scores
- CSBG Annual Report
- Board bylaws, rosters and meeting minutes
- ROMA Audit
- Interviews with board members, staff and customers



Results Oriented Practices Scoring Guide

- **In Crisis** - no evidence of practice, documentation not found
- **Vulnerable** - practices occur sometimes but are not reinforced with written policies and procedures; there is minimal documentation of the practices; may occur in one area of the agency but not found throughout the agency
- **Stable** - practices often occur, with some policies in place; there is documentation; parts of the agency (beyond CSBG funded activities) are engaged in the practice but not the whole agency
- **Thriving** - practices and policies in place and being implemented routinely throughout the agency; there is clear documentation that demonstrates a culture of continuous improvement

Results Oriented Practices-Assessment

The Community Needs Assessment includes	In-Crisis	Vulnerable	Stable	Thriving	Notes
Qualitative Data		X			2 of our 5 programs hold focus groups to collect this kind of data, but it is not included in the CNA
Customer Satisfaction Data			x		Currently only quantitative results are included. We can add direct quotes and comments from our open-ended survey questions in the next CAN.
Agency Report Data				x	We included the following data from our internal reports: demographics of customer served, services provided, outcomes obtained, expenditures by department and by the entire agency
Clear need statements on all three levels		X			We have data reflecting the causes and conditions of poverty, but data has not been analyzed to allow for development of Family, Agency, and Community level need statements.



Review Policies and Procedures



Policies/Procedures may impact staff training needs.

Scenario 1: The agency has decided to implement a Whole Family Approach to service delivery.

- What are current policies and procedures regarding providing “case management” services to your customers?
 - Are there any that will be a barrier to the move to WFA?
 - Consider the funding sources and their expectations.
- What does the community expect to receive from the agency?
 - Will outreach (marketing) be needed to change expectations?
 - Do you have any staff with skills in this area?



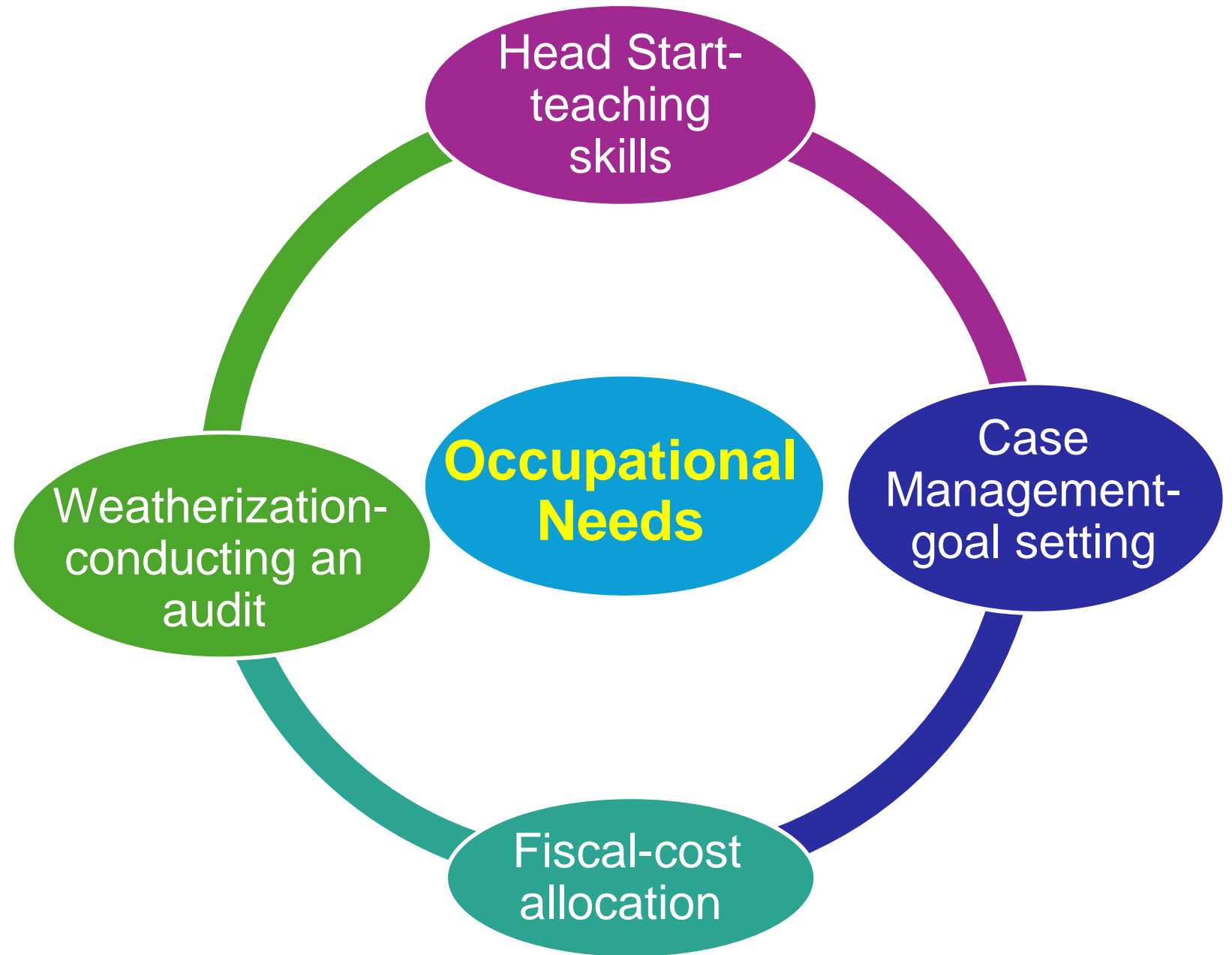
Policies/Procedures may impact staff training needs.

Scenario 2: The agency has had problems with end of year reporting.

Could be errors, omissions, lack of integration of different kinds of data.

- What are current policies and procedures regarding collection of Data?
 - Who does it? How often is it collected? How often reported? How often is data collection monitored?
- What happens to the data?
 - Supervisory aggregation and analysis? Who is involved?
 - Are potential errors identified and corrected?
- How is data communicated?
 - Who gets the data? Is sharing of data valued?
- What skills are needed to improve the process?

Do staff
have the
skills,
knowledge
and ability
required
for their
role?



Data sources: Occupational Needs

- Certificates, Credentials, Degrees
- Training attendance records
- Transcripts from educational programs
- Observations of field work
- Interviews with staff and customers
- Risk Assessment findings
- Internal Assessments



Head Start Health Services Competencies Professional Development Assessment

Attitudes, Knowledge, and Skills	Basic	Pro- ficient	Advanced	Expert
Attitudes				
Value the connections between health and learning				
Knowledge				
Have a working knowledge of the Head Start Program Performance Standards (HSPPS) and other federal, tribal, state, and local requirements regarding health and safety in early care and education				
Skills				
Assist staff and families to understand children’s healthy growth and development				

Experience/skills of current staff may impact training needs. Scenario (cont'd.)

- The agency has decided to implement a Whole Family Approach to service delivery.
- There are 5 positions currently classified as “Case Worker II”.
 - These positions take applications for LIEHAP and emergency rent assistance.
 - Once the application is processed and either approved or denied, the Case Worker has no further contact with the customer.
- Your agency wants to conduct provide training and technical assistance to help staff make the switch from Case Workers providing emergency services to providing longer term case management.
 - What do you need to know about the Occupational Needs of this program?

Questions we can ask to collect more complete qualitative data



What job duty do you struggle with?



Is there someone you can ask to help you so you can feel more confident in your abilities?



What skill do you feel is missing from your experience?

Where are the gaps?

Do current skills, education and experience of staff (X) align with the new expectations?



What needs to change?

What skills are needed?

This is the first and potentially most productive step!

Produce a list of skills and knowledge important to the staff.

Refer to industry standards, job descriptions, and employment search web sites help.

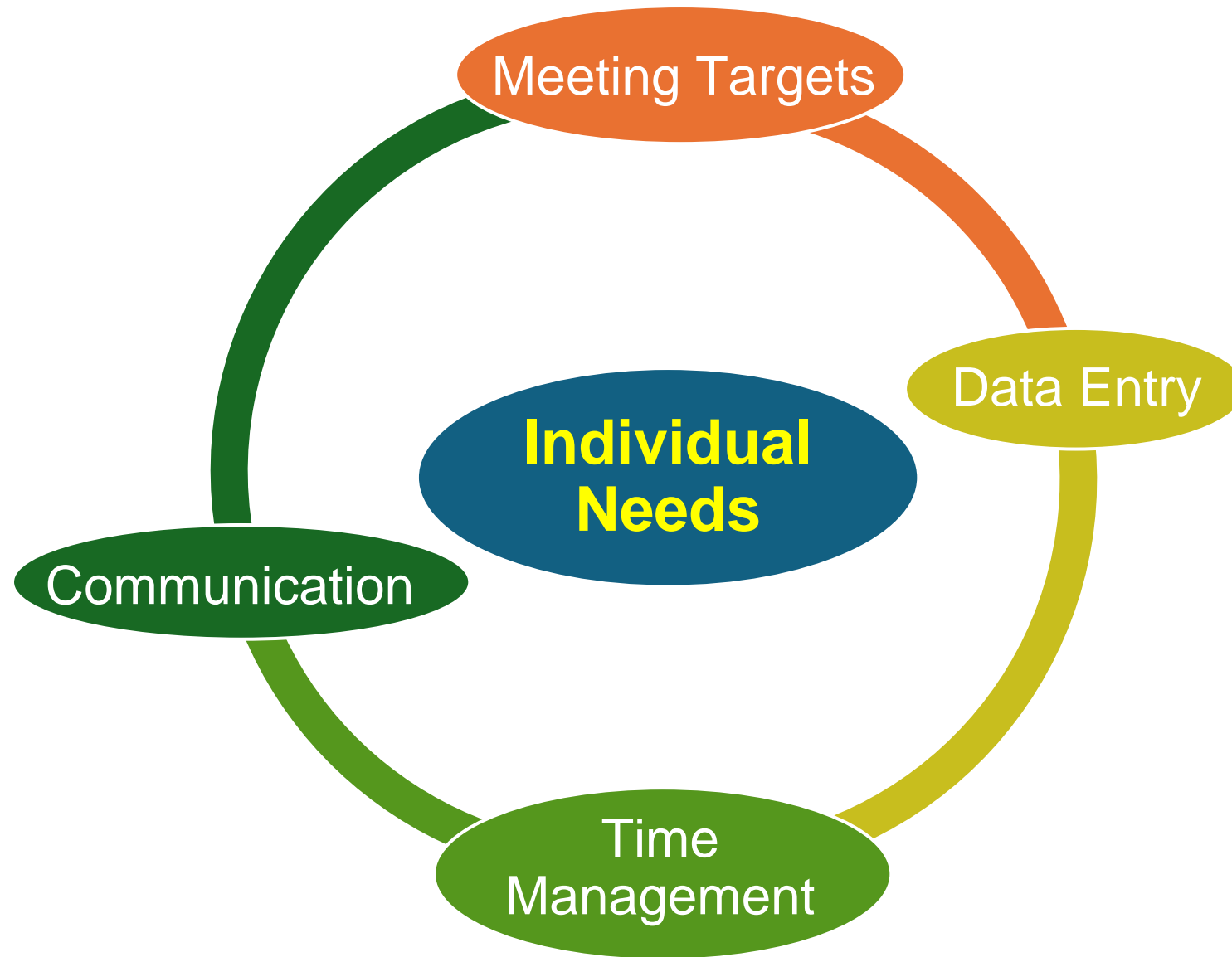


Skills Matrix

	Rapport Building	Goal Setting	Problem Solving	Documentation
Thriving (5)				
Safe (4)				
Stable (3)				
Vulnerable (2)				
In-Crisis (1)				

Skills Gap Analysis – Example template for a group of employees in one program.

Necessary skill	Required for Whole Family Approach	Actual level in Employee 1	Actual level in Employee 2	Actual level in Employee 3	Dept. Average for Skill	Dept. Skill Gap	Do we have existing policy or procedure material available now?
Rapport Building	5	5	3	5	4.3	.7	No
Goal Setting	5	2	3	5	3.3	1.7	No
Problem Solving	5	3	3	2	2.3	2.7	No
Documentation	5	1	5	3	3	2	Yes
		Overall Score (11/20)	Overall Score (14/20)	Overall Score (15/20)			



How well
are
individual
employees
performing?

Data sources: Individual Needs

- Skills assessment
- Interview transcripts
- Performance appraisals
- Work products
- Performance Improvement Plans
- Job descriptions
- Survey responses



Family Worker Self Assessment

I invite customers to identify issues they want to change	Always	Sometimes	Never
I plan with customers not for or about customers	Always	Sometimes	Never
I work with customers to identify outcomes that match identified needs	Always	Sometimes	Never
The plans I create with customers contain outcome (changes) and outputs (services)	Always	Sometimes	Never
I prioritize tasks in plans and break down tasks into manageable steps with timeframes	Always	Sometimes	Never
I refer to the action plan during meetings with customers and update the plan as needed	Always	Sometimes	Never
I ensure that my case notes are current within 72 hours of meeting with customers	Always	Sometimes	Never

Self Reflection

	Notes
As a result of this assessment, I see that these are the things I do well	
As a result of this assessment, I see that these are areas that I need to improve	
Here is what I think will help me to improve	
I will know that I have been successful in improving when...	

Scenario: Performance appraisal of Sally Jones

- Sally earned her Case Management Certificate this year. She has an Associates Degree in Social Service Administration and has been with the agency for 5 years as a Case Worker II. She is now a Whole Family Coach Level 1.
- Sally easily establishes rapport with her customers but admits that she struggles to set boundaries. She has given out her personal cell phone number to customers and regularly accepts friend requests from them on social media.
- Sally effectively expresses empathy and offers words of support and encouragement when her customers are facing challenges. She regularly asks for approval to provide monetary assistance, like gas cards or bill payments, for her customers, but she struggles to create outcome focused action plans with her customers.
- Only 2 of her caseloads of 10 have current data entered in the CASEWORKX database.



Turning Data into Information for Decision Making

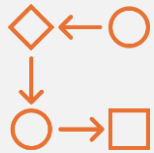


What do we want to change?

- Skills or knowledge?
- Behavior?
- Systems?
- Quality of service?
- Accountability?
- Outcomes?



Is there a common need among staff? (one department, one agency, group of agencies, ...)



Do we have internal policies and procedures regarding the skill/application of skill that aren't being used?

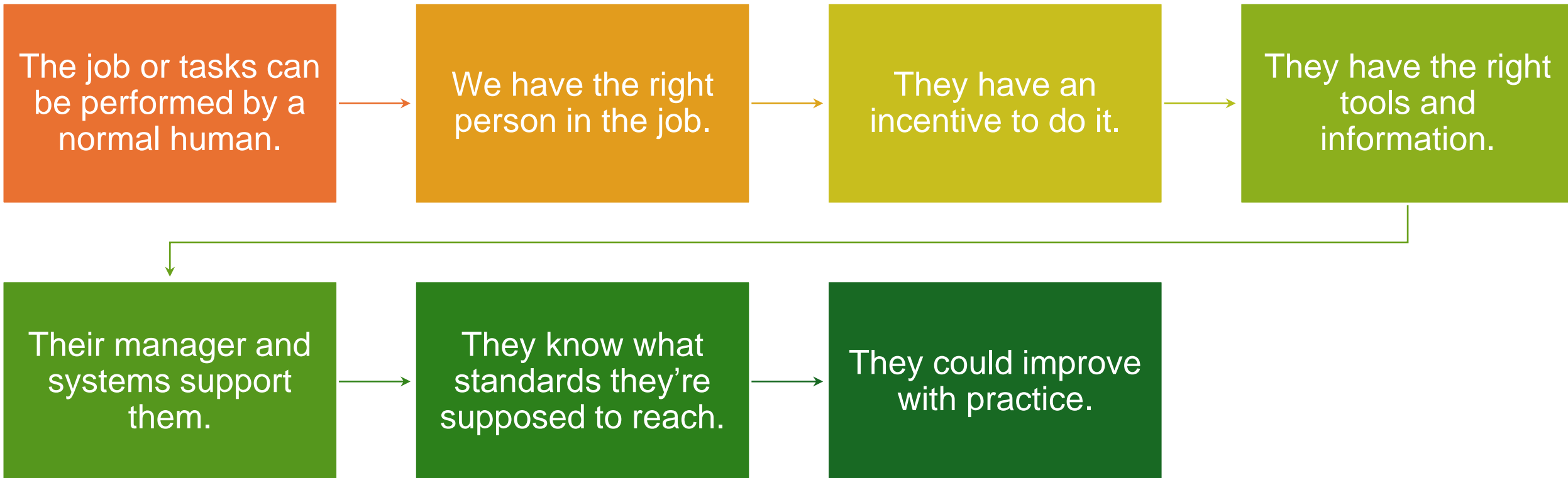


What is the scope of the problem or gap? One department or agency wide?



But wait!

We still are not ready to identify the correct intervention!



What is the correct intervention to meet the need?

Why are people not doing this one thing?

For each need, identify why people aren't doing it.

Problem is with:

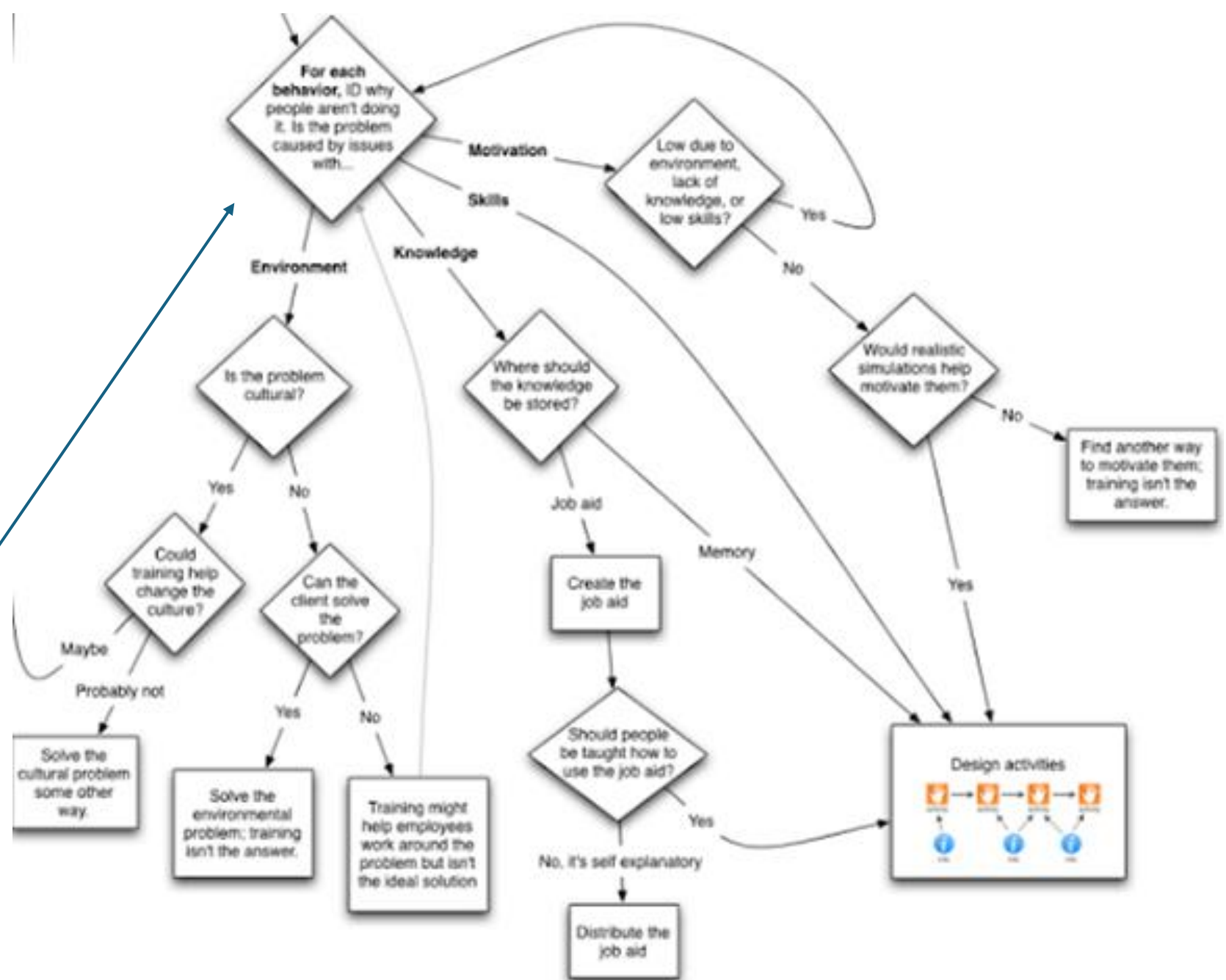
- Environment
- Knowledge
 - Memory or Job Aid
- Skills
- Motivation

Do we really need training?

Someone says,
“We need
training!”

Identify a
measurable
business goal

Identify what
people need to
do to reach the
goal



How to use the flow chart

- <https://blog.cathy-moore.com/is-training-really-the-answer-ask-the-flowchart/>



Group Activity

1. Pick a partner
2. Answer this question: How does your office or agency usually identify training needs?
3. Pick one area you both have in common (data not entered correctly, not meeting outcome targets, etc.) and use the flowchart to determine the best course of action.
4. As you follow the prompts in the flowchart, make note of where you might need additional data to fully answer the prompt.

When training IS the right intervention!



Is there a training that already exists?



What are other organizations doing?



What is the best way to deliver the material?

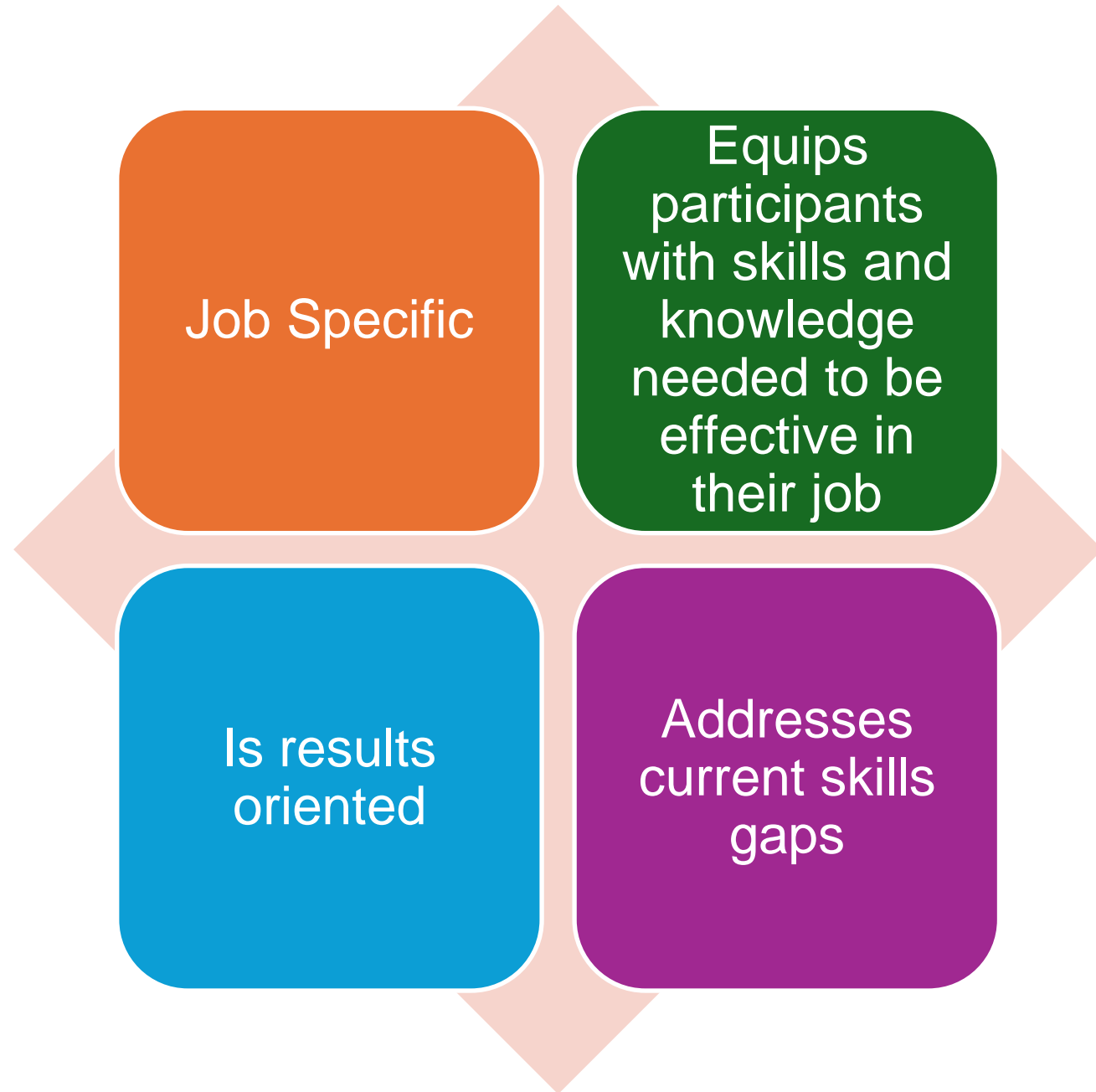


How should we follow up and offer support?



When do we move from training to technical assistance?

What is an
effective
training
program?



Types of Training

Length of the training

15 minutes to 6 months

Virtual or in-person

Live web session, recorded webinar, eCourse

Lecture or active participation in exercises

Next steps- Take action!

**What did this
session help you to
think about in
assessing training
needs?**



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