

ASSESSING PERFORMANCE NEEDS



INTRODUCTION

Assessing Performance Needs can range from taking a few hours to clarify what participants should be able to do after a learning experience to conducting an in-depth needs assessment and training strategy for a complex performance issue that involves many work processes, functions, and roles.

Performance refers to behaviors that produce measurable results and indicate progress toward—or achievement of—an important outcome. At the individual level, this depends on clear expectations, meaningful feedback, and having the resources, skills, knowledge, and motivation to perform.

In this document, we use the terms “assessing” and “analyzing” interchangeably. *Assessing Performance Needs* is different from process improvement, where the focus is on making work procedures more efficient and effective, and it’s different from organization development, where the focus is on strengthening the functioning of groups. *Assessing Performance Needs* focuses on identifying the current and desired state of individual or organizational performance toward specific business goals, determining what is required to close gaps, clarifying limitations, identifying learning or performance solutions, and charting the plan for implementing those solutions.

Learning solutions may include classroom or online learning experiences, mentoring, coaching, and on-the-job training. Performance solutions could include clarifying expectations, providing timely feedback, improving equipment, improving processes or policies, or providing incentives. This assessment helps you determine whether the organization needs a performance solution instead of, or in addition to, a learning solution.

Competent assessment of performance needs increases the likelihood that you:

- Have facts that support assumptions.
- Address the right problems and causes.
- Avoid rushing into a learning solution.
- Identify the best solution or blend of solutions.
- Determine how to evaluate results.

Assessing Performance Needs in an emerging market requires thorough consideration of the local culture, economic conditions, available technology and infrastructure, safety concerns, and personal circumstances of participants. These factors can influence both what needs you assess and how you conduct the assessment. When you address these aspects directly, the resulting program is more likely to target the correct performance issues; therefore, your client and your participants are more likely to accept the program. As you prepare to assess performance needs, ask yourself the following big questions:

- What external influences (cultural, societal, or religious factors) impact program design, content participation, or delivery?
- Is there a gap between what men and women participants can afford to pay for the program?
- How can you mitigate infrastructure and technological limitations?
- What safety precautions for program participants, trainers, and support personnel do you need to provide before, during, and after the program?
- How do participants’ family caregiving responsibilities impact their time and ability to participate in the program?
- What psycho-emotional needs of program participants may require special attention?
- How can your curriculum support opportunities to access to finance?
- What regional post-program support opportunities can the program offer (for example, coaching, mentoring, and peer-to-peer and business networking)?

Assessing Performance Needs is the most complex of the competency categories. It is complex because, in addition to the key competencies outlined in the following pages, successful analysis also involves a number of other interrelated competencies. These include the competencies from *Partnering with Clients*. Other skills include:

adaptability, agility, analytical thinking, systems thinking, design thinking, conceptual thinking, ability to deal with ambiguity, and synthesis of disparate facts into a coherent whole.

While the primary focus in the *Assessing Performance Needs* competencies is the job level, you should also consider the process and organization levels when determining the causes of performance gaps and potential solutions.

The output for the *Assessing Performance Needs* competency is a Needs Assessment report, a training strategy, or both. A Needs Assessment report summarizes the findings of the assessment, characterizes the performance goals and gaps, and offers suggestions for ways to close the gaps. The training strategy summarizes the general strategic approach the organization will implement to close the gaps identified in the Needs Assessment report. It identifies which performance and learning solutions the organization is going to implement, the relationships between the various solutions, the success measurements, the long-term maintenance plan, the budget, timelines, resources, and roles and responsibilities of the project team members.

It serves as the basis for instructional designers and project management to make more detailed decisions during the *Designing Curricula* and *Designing Learning Experiences* phases.

Simple projects, such as creating a single learning experience, usually only need a Needs Assessment report. On the other hand, more complex projects, involving multiple learning experiences and integration with other non-learning performance improvement projects, typically require the longer-term and more project-oriented thinking that a training strategy report provides. Sometimes, business learning specialists combine the Needs Assessment report with the training strategy. However, it is also acceptable to provide them as two separate deliverables.

For additional information on *Assessing Performance Needs* when conducting training in fragile and conflict-affected situations and for gender-inclusive work, please refer to the FCS and gender supplements at the end of this guide.

ASSESSING PERFORMANCE NEEDS

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1. Prepare to assess












Importance




The impact of mastering these competencies is that you:

- Focus on the needs of the participants and your client, and avoid a “knee-jerk” response to requests for a learning solution.
- Plan for an efficient and effective assessment of performance needs.
- Start building a partnership with your client.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

1a	Clarify the client perspective
<input type="checkbox"/>	Explore what the client thinks is actually happening versus what should be happening
<input type="checkbox"/>	Identify changes the client wants to see (for example, desired performance outcomes, behavior, values, attitudes)
<input type="checkbox"/>	Determine measurable business results from the program
<input type="checkbox"/>	Identify stakeholders who will influence the project, along with their roles and perspectives
<input type="checkbox"/>	Identify organizational realities and environmental factors that the client is facing
<input type="checkbox"/>	Confer with your client on recent political and social developments in the area and their possible impacts on the program and the safety of its participants 
<input type="checkbox"/>	Determine how the client will make decisions about recommended solutions
<input type="checkbox"/>	Address any client requests or concerns that could detract from a successful needs assessment
1b	Gather initial information
<input type="checkbox"/>	Determine the extent to which other stakeholders share the client's perspective
<input type="checkbox"/>	Survey existing and past programs conducted in this or similar regions 
<input type="checkbox"/>	Determine availability and quality of local advisory services 
<input type="checkbox"/>	Map the ecosystem of programs in your region that target women or focus on gender inclusion 
<input type="checkbox"/>	Determine the sophistication of the private business culture in the region 
<input type="checkbox"/>	Identify the impact the business need has on resources available to develop the curriculum
<input type="checkbox"/>	Compare stakeholder and client insights on recent political and social developments in the area and their possible impacts on the program
<input type="checkbox"/>	Assess transportation options for program providers and participants and determine mobility constraints  
<input type="checkbox"/>	Examine local social views and belief systems 
<input type="checkbox"/>	Identify religious traditions and norms that a program must observe or accommodate
<input type="checkbox"/>	Determine implications of using a male or a female facilitator 
<input type="checkbox"/>	Determine how women's legal status might impact the program 
<input type="checkbox"/>	Identify factors and constraints for care providers 

➤	Establish baseline economic data on participants
➤	Identify any economic issues that might interfere with program attendance or completion: <ul style="list-style-type: none"> ➤ Determine affordability of your program for your client and participants   ➤ Identify the effect of a fluctuating exchange rate on program fees for the participant and program providers 
➤	Confirm that the desired performance has the potential to affect business results
➤	Determine risk involved in implementing a proposed solution without conducting a needs assessment

1C	Plan needs assessment
➤	Determine resources, time, and budget available and develop a project plan for the needs assessment
➤	Define the target audience for the program
➤	Determine particular constraints that might affect the needs assessment (for example, disruptions due to political unrest, safety or gender equality issues)
➤	Determine data required to identify causes of performance gaps and potential solutions
➤	Determine the most efficient, effective, and ethical methods for collecting data required
➤	Determine who should participate in providing data through focus groups, interviews and other data assessment techniques
➤	Plan sample size and distribution to collect valid and reliable data

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Plan for assessing performance needs	Plan includes rationale for assessing performance needs, resources required, budget, target audience to be studied, data required, rationale for data collection method(s), who should provide data, sample size, and distribution of data
	Plan includes comprehensive list of activities and timing, with clear roles and responsibilities plus approvals needed, as well as communication to stakeholders
	Plan provides guidelines on how to collect information in accordance with regional norms
	Plan describes proposed content of the needs assessment report
	Plan addresses needs and concerns of client and other stakeholders
	Plan is approved by client

2. Identify performance gaps






















Importance

The impact of mastering these competencies is that you:

- Base interventions for improving performance on accurate, unbiased data.
- Have data about the existing state so that you can determine the impact of interventions to improve performance.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

2a	Gather data to determine current and desired performance outcomes
	Review documentation (for example, job descriptions, process diagrams, incident reports, social media)
	Observe performance (for example, user acceptance testing, client calls, daily routines) <ul style="list-style-type: none"> ▸ Build empathy for the participants by asking, observing and listening to their experiences
	Gather data in a manner consistent with the cultural norms and technology infrastructure of the country <ul style="list-style-type: none"> ▸ Design and administer questionnaires, using print, phone, or web technology ▸ Conduct structured interviews and focus groups in person, by phone, or with web technology ▸ Use other forms of participatory research methods, for example, storytelling or scientific experimentation ▸ Determine contingencies in the event that an alternative data-gathering approach is required
	Identify possible cause-effect relationships among performance gaps
	Determine ways to support participants' psycho-emotional needs during performance needs analysis 
	Assess how building leadership skills may benefit participants and program results 
	Assess how building problem-solving skills may benefit participants and program results 
	Assess the need to integrate confidence-building activities into the program and activities to reinforce participants' persistence and self-esteem  
	Identify the importance of recognizing achievement in building self-confidence 
	Identify values that are most likely to resonate with participants and confirm with client
	Consider participant demographics and eligibility criteria for the program 
	Address confidentiality and privacy issues during data-gathering; in particular, identify potential unintended implications of training for participants in general and female participants in particular 
	Manage deviations from plan so that data are not contaminated

2b Conduct job, competency, or goal analysis to determine desired performance outcomes

- ▶ Determine which type of analysis (job, competency, or goal analysis) to conduct
- ▶ Work with subject matter experts and conduct job analysis to:
 - Determine functions and tasks for specific roles
 - Determine performance standards for tasks
 - Identify how to adjust roles to minimize overlap and clarify accountability for all key functions and tasks
- ▶ Work with subject matter experts and conduct competency analysis to:
 - Determine an overall structure or framework for competencies
 - Identify competencies and sub-competencies within the structure or framework
- ▶ Work with subject matter experts and conduct goal (topic) analysis to:
 - Identify specific tasks related to a goal or topic (for example, teamwork, communication, supervision)
 - Determine performance standards for tasks

2c Identify desired performance outcomes and business measures

- ▶ Write statements describing:
 - The desired observable performance outcome from the participant
 - The conditions under which the participant may achieve the outcome, taking into account personal finances and household obligations of prospective participants
 - The associated business measures that gauge the impact of the participants' change in performance and show the relationship between individual performance and organizational performance
 - Existing business measures that will indicate whether the business or organization outcome has been achieved
- ▶ Validate desired performance outcomes and business measures

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Job, competency or goal analysis	Appropriate method of analysis is used
	Job analysis: <ul style="list-style-type: none"> ▸ Identifies functions and tasks for specific roles ▸ Identifies performance standards for tasks ▸ Clearly states tasks using active and appropriate verbs
	Competency analysis: <ul style="list-style-type: none"> ▸ Identifies competencies and supporting competencies within a structure or framework ▸ Clearly states competencies using active and appropriate verbs
	Goal (topic) analysis: <ul style="list-style-type: none"> ▸ Identifies specific tasks related to a goal or topic ▸ Identifies performance standards for tasks ▸ Clearly states tasks using active and appropriate verbs
Analysis of performance gaps and opportunities to improve performance	Analysis identifies gap(s) between current and desired performance outcomes
	Analysis is stated in terms of specific performance outcomes
	Performance outcomes state observable outcome desired and conditions under which participants can achieve the outcome, including conditions related to legal environment, security, personal resilience, personal finances, and household obligations
	Analysis identifies business measures and targets that will indicate whether the program has helped to achieve desired performance and business outcomes
	Analysis is based on accurate and reliable data
	Analysis determines cause-effect relationships among performance gaps

3. Determine causes of performance gaps

Importance

The impact of mastering these competencies is that you:

- Offer an explanation for performance gaps that is rooted in data collected.
- Take a comprehensive approach to analyzing performance at the job, process, and organization level.
- Recommend learning and other performance solutions, and explain how they address causes of performance gaps.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

3a Determine job-level causes

Review data from documentation, observation of performance, structured interviews, focus groups, or questionnaires

Analyze data to determine extent to which performance is affected by:

- Expectations that are unclear or seen as unrealistic
- Feedback that is not specific and timely
- Tools and resources that are not effective and efficient
- Consequences that, on balance, do not support performance
- Incentives that, on balance, do not support performance
- Participants' knowledge, skills and ability, including their skills using technology

3b Determine process-level causes

Review data from documentation, observation of performance, structured interviews, focus groups, or questionnaires

Analyze data to determine extent to which performance is affected by:

- Work processes or procedures that do not support desired performance outcomes (for example, being too complicated to follow, inefficient, overlapping with other areas)
- Technology that does not perform as expected or that users have difficulty using as intended

3C Determine organization-level causes

- ▶ Review data from documentation, observation of performance, structured interviews, focus groups, or questionnaires
- ▶ Identify any macro-economic issues that might interfere with participants attending or completing the program and consider how to mitigate them
- ▶ Analyze data to determine extent to which performance is affected by:
 - ▶ Organizational structure that does not support job-level performance
 - ▶ Desired performance outcomes that are not aligned with business strategies
 - ▶ Desired performance outcomes that are not aligned with vision and values
 - ▶ Lack of access to mentors or coaches
 - ▶ Insufficient support from external business networks

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
List of causes of performance gaps	Causes are based on accurate and reliable data and sound analysis
	List considers all likely causes at a job, process, and organization level, as well as indirect causes related to country, individual, or family context
	List of causes identifies cause-effect relationships among the various causes

4. Identify solutions for closing gaps









Importance

The impact of mastering these competencies is that you:

- Identify learning and other performance solutions that address causes of performance gaps.
- Take a comprehensive approach to identifying solutions at the job, process, and organization level.
- Make recommendations based on sound decision-making principles and the best available data.


Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

4a	Identify potential solutions for closing performance gaps
▶	Set priority on which performance gaps to address first
▶	Identify performance solutions, as required (for example, process improvement, leadership endorsement, role clarification, incentives, web-based tools, technology changes, endorsement and support by key community influencers)
▶	Identify learning solutions, as required (for example, facilitated classroom or e-classroom sessions, online learning, on-the-job training, job shadowing, job aids, peer support, videos)
▶	Identify alternatives to face-to-face-learning  
▶	Identify any economic issues that might interfere with participants attending or completing the program or course and consider how to mitigate them: <ul style="list-style-type: none"> ▶ Determine local costs to use technology to deliver the solution (for example, cost of internet, SMS connectivity, transit to location of digital devices)
▶	Identify likely technological failures at the program venue and possible mitigation strategies:  <ul style="list-style-type: none"> ▶ Determine what contingencies are available in the event of such failures ▶ Determine back-up equipment ▶ Assess appropriateness of alternative training approaches in the event of a technological failure
▶	Identify appropriate communication channels to reach prospective participants and inform them of upcoming program
▶	Examine unintended consequences of the program on participants, including violence 
▶	Assess need to provide women role models 
▶	Determine viability of coaching and/or mentoring 
▶	Determine the influence of social networks and peer learning 
▶	Identify household decision makers to consult in connection with your program 

1. Prepare
to assess2. Identify
performance gaps3. Determine causes of
performance gaps4. Identify solutions
for closing gaps5. Validate next steps
and measures

4b Select learning and other performance solutions

- Determine criteria for evaluating alternative solutions (for example, potential impact on performance gaps, cost to design, cost to implement)
 - Assess how existing political, social, economic and safety factors are likely to impact program content and its acceptance and application 
- Gather data to assess alternative solutions against the set of criteria
- Determine which solutions best meet the criteria
- Identify dependencies among all solutions recommended
- Verify that solutions are accessible (for example, meeting needs of visual or hearing impairments, medical conditions, physical disabilities, learning disabilities)
- Identify when change management support is required
- Assess risks associated with implementing each of the preferred solutions

4c Develop a plan to support the transfer of learning and sustained performance

- Assess environment to determine feasible options for supporting the transfer of learning
 - Identify available alternatives to reinforce learning after the program is completed and confirm longer-term impact
 - Reinforce training through distance education or other means, if feasible, after the instructor-led training is completed
- Recommend initiatives to support transfer (for example, communication of expectations, reminders, feedback mechanisms, follow-up activities, coaching/mentoring support, incentives)
- Determine resources required to support the transfer of learning
- Determine how technology can support the transfer of learning (for example, automated reminders, online performance tracking, links to support)

4d Develop a plan to evaluate the transfer of learning and business results for learning solutions

- Identify pre-program (benchmark) performance outcomes and business measures
- Recommend how to assess post-intervention performance and business results against benchmark data
- Determine timing and required resources for evaluation

4e	Develop a strategy for implementing the solution
▶	Determine the resource needs to develop the solution
▶	List the learning and other performance solutions required to close the performance gaps
▶	Identify the goal or purpose for each solution or learning experience
▶	List the roles and responsibilities for each project team member responsible for developing the solution
▶	Create a schedule for developing the solution
▶	Create a budget for developing the solution
▶	Identify the methods to assist participants in transferring (applying) the learning to their real world situations
▶	Identify the key performance indicators needed to determine the success of the solution
▶	Identify the resources and responsible parties needed to operate, maintain, and sustain the program after the initial delivery

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
List of potential performance solutions in order of priority	List identifies how each solution will address causes of specific performance gaps to achieve desired performance outcomes
	List identifies dependencies on other solutions recommended
	Solutions include descriptions of actions required to implement each solution
	Solutions include estimate of resources and technology required
	Solutions identify desired individual performance outcomes
	Individual performance outcomes align with needed organizational performance outcomes

KEY OUTPUTS	ASSESSMENT CRITERIA
Learning solutions component of the training strategy report	Report identifies recommended solutions
	Report identifies how each solution addresses causes of specific performance gaps to achieve desired performance and business outcomes
	Report identifies dependencies and connections to other solutions recommended
	Solutions include descriptions of actions required to implement each solution
	Solutions include high-level purpose and goals
	Solutions include an estimate of the required resources, time, and technology
	List of goals reflects the perspectives of all stakeholders
	Clearly stated and regionally appropriate design principles and adaptations to them along with rationale for choosing them
	Distinct groups of participants are clearly profiled
	Impact of current and future technology identified, relevant to regional context
	List of interdependencies and constraints is comprehensive, including availability of networks, coaches, and mentors to support the program and relationship of program with access to finance
Plan for supporting the transfer of learning	Plan includes realistic solutions for the transfer and application or learning from the classroom to the workplace, based on desired performance outcomes
	Plan identifies resources and time required to implement support for the transfer of learning
	Plan includes communication and follow-up activities
	Plan identifies technology to support the transfer of learning
Plan to evaluate the transfer of learning and business results	Plan identifies who will gather and analyze which data
	Plan identifies when to conduct evaluations
	Plan includes benchmarks of pre-program performance and business results
	Plan addresses who enters data and where the organization stores the evaluation data
	Plan includes estimate of resources required to implement evaluation plan

5. Validate next steps and measures

Importance

The impact of mastering these competencies is that you:

- Build support for the effective implementation of learning and other performance solutions.
- Identify which solutions to implement and their order of priority in consultation with the client.
- Set the stage for evaluation against specific business measures and desired performance outcomes.
- Identify priority tasks for learning.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

5a	Prepare needs assessment report
<input type="checkbox"/>	Prepare executive summary for the report
<input type="checkbox"/>	Present current and desired business goals
<input type="checkbox"/>	Present current and desired performance goals
<input type="checkbox"/>	Present participants' current and desired knowledge goals
<input type="checkbox"/>	Present participants' needs and limitations for participation in program
<input type="checkbox"/>	Present recommended options for learning and other performance solutions based on key findings
<input type="checkbox"/>	Present recommended options for supporting the transfer of learning
<input type="checkbox"/>	Explain purpose of needs assessment
<input type="checkbox"/>	Summarize key findings of needs assessment
<input type="checkbox"/>	Describe implications of not addressing the performance gaps
<input type="checkbox"/>	Describe process followed to conduct the needs assessment
5b	Prepare program strategy report
<input type="checkbox"/>	Prepare executive summary for the report
<input type="checkbox"/>	Present recommendations for learning and other performance solutions based on key findings
<input type="checkbox"/>	Identify the target audience for each solution or learning experience and determine whether participation is mandatory
<input type="checkbox"/>	Present recommendations for supporting the transfer of learning
<input type="checkbox"/>	Present desired performance outcomes and recommended business measures
<input type="checkbox"/>	Present recommendations for evaluating solutions
<input type="checkbox"/>	Present recommendations for how to assess participant reaction, learning objectives, and transfer of learning (application) at an aggregate level
<input type="checkbox"/>	Prepare draft implementation plan, including budget and work schedule

- Present list of roles and responsibilities for everyone involved in creating the solution
- Present recommendations for sustaining the program in the long-term or, at a minimum, include a list of questions for the client to answer to create a plan for the long-term sustainment of the program

5c Present report to client

- Prepare agenda for meeting with the client and key stakeholders
- Present highlights of needs assessment report
- Facilitate discussion with the client and key stakeholders
- Respond to questions and address concerns
- Confirm how and when the client will make decisions regarding recommendations
- Confirm next steps and actions for advancing the plan

5d Secure approval and support for recommended solutions

- Incorporate modifications from client and key stakeholders
- Confirm with client the priority tasks or competencies for learning
- Validate implementation plan with client

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Needs assessment report	Report includes executive summary, purpose, process, key findings, potential performance outcomes and recommended business measures, and implications of not addressing performance gaps
	Report updated to include modifications based on feedback from the client and key stakeholders
Presentation of needs assessment report	Presentation begins with an agenda
	Presentation highlights recommended learning and other performance solutions based on key findings
	Presentation provides an opportunity for client and stakeholders to ask questions
	Presentation addresses client's and stakeholders' questions and concerns
Program strategy report	Report includes executive summary, purpose, recommended solutions, success measures, workplan and budget for developing the program, workplan and budget for delivering the program, workplan and budget for sustaining the program, workplan and budget for evaluating the program, key roles and responsibilities, rationale for recommended learning and other performance solutions, target audience for learning, and whether learning is mandatory
	Report updated to include modifications based on feedback from the client and key stakeholders
Presentation of program strategy report	Presentation begins with an agenda
	Presentation highlights recommended learning and other performance solutions based on key findings
	Presentation addresses budget and schedule questions
	Presentation provides an opportunity for client and stakeholders to ask questions
	Presentation addresses client's and stakeholders' questions and concerns