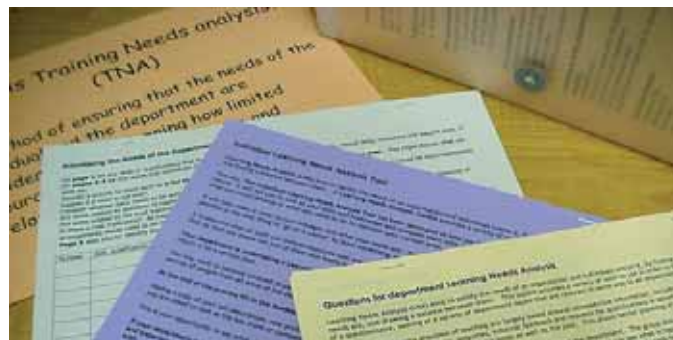


Implementing and updating a learning needs analysis toolkit

By Angharad Hughes, MSc, RGN

Learning needs analysis seeks to balance the preferences of staff with the skill needs of their department and trust. This article describes the updating and implementing of a previously-developed tool kit



Questionnaires and instructions form part of the learning needs analysis toolkit

In October 2004, *Hospital Pharmacist* published an article I wrote about a training needs analysis toolkit that had been devised and tested with a small group of staff (including pharmacists) at the Royal United Hospital Bath NHS Trust.¹ In it, I reviewed published work about the competing needs of organisations and individuals and the importance of finding a balance between them. A small project had been undertaken to determine the needs of a staff group who used the toolkit. The aim was to provide the Trust with a practical tool that could be used in a number of different ways, that would link to appraisal and contribute to the implementation of the Knowledge and Skills Framework (KSF).

Since then, I have carried out further work on the toolkit to update it. This article describes the further-developed toolkit and discusses how it can link with the KSF. Although I have moved on, colleagues are now implementing the toolkit across the trust.

It should be noted that, when the project started, the term “training needs analysis” was most often used. “Learning needs analysis” (LNA) is now considered to be more appropriate and is the term I will use.

Toolkit content

The toolkit has two parts — analysis tools and process tools. The process tools are

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materials that help the process, such as timetables, posters, literature and instructions. The analysis tools include individual and departmental questionnaires and a planning tool.

Questions for individual staff members in the LNA toolkit focus on their current role and the key competencies required to carry out their job. Staff are asked to consider their level of ability. This approach should make self-assessment easier, since it helps staff reflect on their progress and plan their future learning.

Completing the departmental questionnaires requires a review of current practice. It is important that those leading the analysis ask for the right information from the right sources.² Explicit information, that is held by the trust, will come from previous training, documentation and processes such as evaluation. Other information, held by those controlling and or affected by the analysis, is related to the skills and knowledge of the workforce. All types of information are needed for LNA, and so the information gathering should be widespread and thorough. This might include questioning staff, reviewing staff satisfaction surveys and exit interview documentation as well as feedback from the individual questionnaires. At all stages, it is important to keep possible future issues in mind.

Making decisions about allocation of limited resources is always going to be difficult, and the planning tool is designed to help with this. It asks about available resources, priorities for the trust, department and individuals and helps planning of activities, whether they have a monetary cost or the cost is in terms of time and support. It also

encourages staff to consider alternatives to taught courses.

Based on the initial pilot of the toolkit, changes have been made in relation to the clarity of questions and to reflect new initiatives, including the KSF.

Linking with the KSF

It is crucial to link any new assessment or analysis to the changing health care climate. One of the most significant of these is the implementation of Agenda for Change and the introduction of the KSF for most groups of NHS staff.

The purpose of the KSF is to support changes in service, invest in the development of staff, ensure staff and managers are aware of the requirements in each role, support staff to be effective in that role and to promote equity.³ The LNA toolkit aims to meet these requirements by promoting a transparent system of needs analysis. For example, staff from all groups are invited to participate in the process. If they are unwilling or unable to do so, the departmental analysis can be carried out by a manager, but an element of ownership and knowledge will be lost.

Agenda for Change calls for much more planning both at a departmental and individual level, based on a clear set of criteria in KSF outlines. Appraisal is a key issue with the development of the KSF. An aspect of the LNA toolkit is to integrate with the appraisal process, helping staff to identify realistic needs and goals more clearly. To achieve this, the individual questionnaires were changed to reflect the six core competencies required of all staff.³ This part of the

LNA toolkit may be used by individuals as part of the total LNA process or as a discussion document to be used at appraisal with or without their supervisors. One recommendation that emerged from this work was the need for a simple individual questionnaire for staff who might find a lengthy document overwhelming and would therefore fail to participate. There are plans to incorporate this suggestion into the toolkit.

— Implementing LNA

Experience to date suggests that, for successful implementation of LNA, there needs to be commitment from everyone in the department, especially from managers, who will need to encourage participation and be prepared to allow some time for the analysis to be carried out. Usually a meeting is held to explain the process to staff, help them become committed to the project and allay any concerns they may have. A project group can be formed to manage the analysis and complete the departmental questionnaire. From this group someone will lead the analysis. This does not have to be a manager or budget holder.

Since most people do not like change, it is important to consider possible resistance to implementation.⁴ Resistance is more likely at times of great change, such as the present,

and so LNA will need to be seen as beneficial to staff or they will view it negatively.⁴ If it is seen as being integrated into other systems such as the KSF and appraisal, and seen to help staff rather than create extra work, it may be more acceptable to them. In addition, because it encourages participation from staff, inclusion in the process allows ownership of the findings and commitment to the outcomes.

During times of financial shortage, education and development are often the first areas to be cut.⁵ LNA helps to focus cost effectiveness. To improve or change service delivery, investment needs to be made in staff so that they are able to carry out their roles effectively.

Evaluation is seen as being an essential point in the cycle of change.⁶ For the process to be successful and complete, evaluation should be part of the LNA process. Unfortunately evaluation is often not carried out, leaving the cycle incomplete.

The final, key element for successful LNA is the translation of theory into action. This might be reviewed and evaluated when an individual has an appraisal or when departmental LNA is next carried out.

The toolkit should be viewed as a flexible set of tools which can be altered as circumstances change allowing them to be updated as and when required.

— Conclusion

LNA can be a useful tool to help focus on realistic requirements that can be met with the resources available. In order to be successfully implemented, LNA needs to be seen as an integral part of the appraisal process and linked to Agenda for Change. It also needs to be seen as a cost-effective tool. In addition, there needs to be commitment from staff at all levels, who then ensure that the cycle of analysis and implementation is completed.

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