QUILL LEARNING NETWORK

ORGANIZATIONAL NEEDS ASSESSMENT

Processes, Observations and Best Practices

2023

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Executive Summary

As part of the Skills for Success Workplace Literacy pilot project (2022-23), QUILL conducted two Organizational Needs Assessments (ONA) with manufacturing businesses, and one with a non-profit organization.

What We Know

Before undertaking this ONA process, it was already apparent that employers had been struggling with staffing shortages for years. This problem has been compounded by fewer available workers since the COVID-19 pandemic. Given this, we were already aware that a small pool of available workers would have an impact on the type of training needed, the availability of staff to attend training, and the overall ability of companies to commit to processes like building skills inventories, designing training plans, and creating long-term strategies for retention and succession planning.

When working short-staffed and requiring available resources to be allocated to immediate hiring needs and current staffing gaps, we already knew that overall training needs would probably be secondary to filling immediate vacancies. However, with the constant need to hire, we also assumed that employers may be increasingly hiring entry-level employees without all the skills needed to succeed simply because applicants with considerable skillsets are more likely to already be employed. Employers are increasingly needing to fill positions, but are often caught between hiring any interested applicants, yet lacking time and resources to upskill them once hired. This is a widespread problem and the ONA process can help employers identify specific training needs even if ability to pursue training is limited at present.

What We Learned

Employer training needs have not changed with the current labour market but businesses need properly skilled employees now more than ever. With a critical labour shortage, they cannot afford to spend additional time training employees on entry-level skills; however, they find themselves increasingly in need of this training because new employees are not coming into the workplace with the skills they need to succeed. All employers we spoke with identified soft skills as the least likely to be evident in new employees, and also the most challenging skills to teach. Due to labour shortages, employers are trying to make things work with employees who would previously have been fired due to things like lack of reliability and dependability, difficulty working with others, and lack of respect in the workplace. However, employers often cited how they are making an increasing number of accommodations and accepting lower than ideal standards, particularly related to soft skills, because they cannot afford to lose employees who are willing to work at all.

Every employer we consulted for this project – both those who agreed to participate and those who did not have the time to invest in this process – is currently short-staffed. This staffing issue is chronic, widespread, and significantly worse since the COVID-19 pandemic. As a result, businesses are hiring anyone who is available to work; this group increasingly includes people without all the skills needed to adequately do the job.

Due to staffing shortages, hiring managers, Human Resources departments and business owners are overworked and increasingly working as "jack of all trades" to fill staffing gaps and skill shortages. This is particularly true of smaller businesses which make up the majority of businesses in QUILL region. When offering training, we need to be mindful of staffing limitations particularly for small businesses in which existing staff may be overworked and not confined to specific job descriptions or regular tasks.

One consequence of the current shortage of labour is that most businesses likely have very little ability to plan training, assess training needs, or create strong internal succession planning strategies. In addition, even when needs are identified – either internally or through an ONA process – there may be very limited capacity to devote any time to staff training beyond what is legislated and otherwise required.

Ideal Approach to Conducting an ONA in QUILL Region

Given time constraints, staffing shortages and the nature of small businesses who often lack dedicated Human Resources and training departments, the way in which we were able to most effectively and efficiently conduct the ONA process included

- **Short conversations** that were flexible to employer availability: Employers could not commit more than 2 or 3 hours total to this process; an initial discussion followed by shorter follow-ups either on the phone or virtually was the best approach.

- **Asynchronous participation** and information-sharing was appreciated by employers as this allowed the greatest flexibility. As much as possible, surveys or follow-up questions that were sent by email – allowing employers to respond at a time that worked best for them – were most appreciated by employers.

- **Broad exploration** of training needs discussions are crucial for success with the ONA process. It is difficult to separate employer needs related to Skills for Success (and corresponding LBS training options) from training needs related to higher-level positions, succession planning and management roles. As such, the ONA process requires attentiveness to all training needs with the goal of identifying other local providers who can meet the training needs that may be beyond the scope of LBS programs. In order to meet identified employer needs, it is critical that local training options not be offered in silos, but are instead

integrated into broader training plans for employers which may include industry-specific skills, micro-credentials, and post-secondary certificates or diplomas. While employers are broadly concerned with the need for soft skills in all positions, they did not generally prioritize this above all other competencies needed in the workplace.

How Training Needs are Prioritized

As previously noted, employers do not differentiate between training that can be conducted through LBS providers and training that is conducted elsewhere. They are looking for information about which programs can best meet their needs.

Primarily, soft skills training around communication, collaboration, adaptability and problem solving were mentioned frequently both in relation to new employees and in reference to building skillsets for new managers and high-potential employees within an organization.

Additional training needs – related in part to an increasingly diverse workforce for some employers – include ESL training and Clear Language review of key documents.

Finally, early management training – particularly concerning soft skills like conflict management and managing interpersonal conflicts while in a supervisory role – was identified as an important training need. Small businesses without dedicated training departments struggle to properly train potential managers and these businesses are often too small for there to be opportunities to job shadow and learn from other senior staff before assuming a management position.

Which Training Processes and Approaches are Requested

On-Site, On-Demand, or Train-the-Trainer: Employers we consulted struggle with the same challenges as all business and training providers in the region. Key limitations with training participation include

- challenges with transportation
- geographical spread (often between two or more business locations with employees at both sites)
- ongoing staffing shortages that limit training options that can be designed and delivered in-house, as well as challenges with staff availability to participate in training

Cumulative: Meeting entry-level training needs would, for some employers, be ideal if this could be the first step towards a longer-term progression and internal advancement opportunities within the company.

Individualized Approach: Attention to learning styles and individual learning needs was mentioned by more than one employer. Many have struggled with "one size fits all" courses or training models and would, ideally, prefer training that aligns with each employee's learning needs and style.

Measurable Impact: Employers want to be able to see the short- and long-term impacts of any additional training. Again, due to staffing shortages and time constraints overall, the investment in additional training – time and/or financial – needs to be worthwhile. Local employers are more willing to focus on staff training if a post-training assessment or other impact measure will be undertaken in the weeks or months following training. This was mentioned particularly in reference to entry-level employees who may be entering the workplace without all the skills they need to thrive.

Which Skills for Success Categories Are In-Demand

For entry-level positions, Skills for Success training categories that are most often prioritized are

- communication
- collaboration
- problem solving
- digital skills (in some cases)

What LBS Programs Can Do

Flexible and Customizable: Employers we consulted for this project were overwhelmingly in favour of customizable training options that could be adapted to suit their specific workforce needs. Those who had previous experience with various training organizations often had mixed feedback – from both staff and managers – about these courses. Most identified an important need for soft skills throughout the company, regardless of the specific position.

Alignment and Referrals: When working with employers on Skills for Success training, it is important that LBS providers align their training within a broader framework of available options in the community. As noted, employers do not differentiate between providers when determining overall training needs for their businesses.

Measurable Impact: Even with dire worker shortages, employers may be willing to commit to training programs that meet the needs of their employees, particularly if there is follow-up and measurable impact of training. Pre- and post-training assessments may be helpful to meet this need, as well as a clear understanding of how training programs can help effect change, examples of how this has worked well in other workplaces, and an explanation of the relationship between specific training courses and opportunities to improve efficiency or productivity.

Moving Forward

In order to meet the needs identified by local employers, training should

- be mindful of time constraints and, in most cases, be very short in duration.
- consider individual learning styles and accommodate training to meet these needs.
- be able to address training issues by implementing solutions that have measurable, trackable impacts over time that can improve productivity or efficiency in certain areas of the workplace or with certain groups of employees
- be able to work on-site with employers and adapt to conditions such as time of year to accommodate busy times of work.
- recognize that identified training needs are not new. What is new is the increasing need for assistance with some entry-level skills (especially Soft Skills) due to the necessity of hiring in such a tight labour market particularly when candidates do not have all needed skills.
- be aware that employers want to understand training offered by LBS providers within the context of all training programs available to them. The overall approach to meeting workplace training needs may include a variety of other training options offered by multiple providers. Skills for Success represents one training piece within a larger need that we must meet collaboratively by recommending additional training that is offered by other organizations where applicable.

Summary

Employers want easy access to streamlined, seamless training offerings in their communities. From their perspective, the difference between what LBS can offer compared to a local College's micro-credentials, post-secondary certificates or other available options to meet training needs is unimportant. What they are looking for is

one repository or point of contact for all training options so they can easily find what they need once those needs have been identified.

For employers, training needs for entry-level employees are closely tied to training needs for all staff, particularly as this relates to succession planning and skill building for high-potential employees with internal advancement opportunities. Discussions about Skills for Success are not, for most employers, discreet from discussions about broader skill building for individual and organizational success. As previously discussed, training is also seen as a secondary concern to workforce shortages.

Advertising and Outreach

Approach

QUILL created an introductory letter to employers and partners and also created an advertising flyer for this project. In addition, multiple contacts within QUILL region were approached and asked for either participation in the ONA process or suggestions about employers who may be interested in participating.

Advertising flyers, phone calls, emails and networking were undertaken with the following groups:

- Literacy and Basic Skills (LBS) providers
- Employment Services (ES) providers
- Workforce Planning Board
- Economic Development
- Local industry groups
- Local Human Resources associations
- Local non-profit and community development organizations
- Chambers of commerce and business improvement associations
- Social media sharing and promotion (Facebook, Twitter, LinkedIn)

Result

Three employers connected with QUILL and worked with us to complete an ONA. Two represent the manufacturing sector (one in Perth and one in Grey); the third is a non-profit organization active in both Bruce and Huron.

Challenges

The greatest challenges faced with recruiting employers to participate in this ONA process were

- lack of time to participate
- understaffing
- small organizations
- problems previously identified and shared through other processes or with other organizations
- lack of time for employees to attend future training

1. Lack of Time to Participate

Employers who participated in this process as well as those we spoke with who said they were unable to participate cited lack of time as a key obstacle to completing an ONA. Recognizing this, the ONA process in QUILL region was subsequently marketed and undertaken with minimal time investment from employers. As much as possible, we used asynchronous methods of gathering relevant information such as sending out surveys and feedback forms and allowing employers to complete this on their own time. Short follow-up conversations occurred primarily through virtual methods as this was more conducive to employers' needs. As noted in the final ONA reports, lack of time to participate in this process is, in part, a reflection of an extremely tight labour market in which employers in QUILL region are spending all available time trying to recruit more workers and meet deadlines without a full staff. While many employers we spoke to recognize the value of a training needs assessment, the time investment is a significant barrier to participation.

2. Understaffing

Almost every employer who was approached or agreed to participate in the ONA process is currently operating with considerable employee vacancies. As described in

the ONA reports, QUILL region has one of the lowest unemployment rates in the province of Ontario and this has been exacerbated by the recent pandemic in which a significant portion of the eligible workforce has removed themselves from working or looking for work. As a consequence, labour shortages are more significant than they have ever been which has compounded an existing problem in this region. Due to this, managers, supervisors and company owners are often filling in and working in multiple positions in order to ensure work is completed. The consequence of this for the ONA process is that senior staff often described a chronic state of simply treading water instead of having an opportunity to identify skill gaps, training needs, and engage in long-term planning. In an economic climate with such a dire shortage of workers, attention to a process like an ONA is not feasible for the majority of businesses.

3. Small Organizations

QUILL region is rural and primarily consists of small businesses. As an ONA is not an assessment of individual skills, competencies, and needs, it is challenging to undertake this process with businesses that have fewer than ten staff. We were able to conduct an ONA with businesses representing fewer than 10 employees, approximately 50 employees and approximately 100 employees which gave us a good sampling of local needs. However, the ONA process itself needed to be adapted to smaller workplaces as, in most cases, there were not multiple levels of supervisors and/or managers and there were no unionized workplaces with union representatives who could be consulted. Due, in part, to the small size of most local businesses, it was not feasible to speak to more than a few people in Human Resources (HR) or managerial positions. In each ONA we conducted, HR and training responsibilities fall to the same person; with the smallest business, the Executive Director (ED) assumes all functions related to hiring and training and does not have any additional support staff to assist with these tasks. This means that the ONA process in QUILL region will not have the breadth of input that might be possible in larger companies with multiple managers and departments.

4. Problems Previously Identified

Most employers we spoke to have previously worked with the local planning board, economic development, ES providers, and/or LBS providers. In a small rural region with chronic staffing shortages, the problems employers face are well-known. Most are aware of training resources yet, as noted above, cannot commit staff time to significant training in the midst of overwhelming staff shortages. Many employers did not have time to commit to the ONA process in part because they feel they have previously shared training needs and overall workforce concerns with multiple people across various projects and initiatives. There was some frustration concerning lack of concrete movement towards solving these problems. For most employers, solving workforce shortages is currently more important than identifying and meeting training needs.

5. Lack of Time for Employees to Attend Future Training

While employers who completed the ONA process have been able to identify gaps in training and anticipated needs, they were largely concerned with their ability to release employees for training as this would reduce overall productivity. However, employers were all looking for ways to be connected with possible training options even if these will be pursued at some point in the future when hiring needs have stabilized.

Additional Observations

For employers, training needs for entry-level employees are closely tied to training needs for all staff, particularly related to succession planning and skill building for high-potential employees with internal advancement opportunities. Discussions about Skills for Success are not, for most employers, discreet from discussions about higher-level credentials, certifications, and broader skill building for individual and organizational success. As mentioned above, training is also seen as a secondary concern to workforce shortages. Marketing and exploring options for future ONAs in QUILL region will need to be mindful of these considerations.

Appendix A: ONA Advertising Flyer

Appendix B: Informational Handout

Workplace Training and Employee Retention

Are you struggling with recruiting or retaining workers with the right skills to meet the demands of your business?

Would you be interested in discussing local training options that are available to your workforce?

Are you interested in working with us to assess your workplace needs and which training options could be tailored to address these needs?

Background

QUILL Learning Network is a non-profit, government-funded regional literacy network and support organization for upgrading programs in Bruce, Grey, Huron, Perth, and South Georgian Bay. We are working with employers to conduct free Organizational Needs Assessments (ONA) in order to offer applicable training to meet the needs of local businesses.

What is an Organizational Needs Assessment?

- An ONA is a process through which managers, human resources representatives, and/or employees have an opportunity to identify skill gaps and potential training needs through interviews, focus groups or surveys.

Is an ONA an Individual Worker Assessment?

No. This is a broad evaluation of skills needed for success within your business, with a focus on particular job categories where you may be struggling with retention and turnover.

How Can an ONA Help with Workforce Retention?

- Identifying training that may be needed to upskill your current workforce so your employees have the skills needed for success and advancement;

- Identifying skills that may be lacking in new hires and training that could be incorporated into onboarding and early training programs;
- Identifying skills needed for career progression within your business and ensuring employees can upskill as part of succession planning.

How Much Time is Required to Participate?

- An ONA can be completed with minimal time investment. Ideally, we would like an opportunity to speak with leaders within your organization, human resources representatives and/or employees. This can be undertaken at your place of business or virtually.

Return on Investment

- Report outlining training recommendations that fit the needs of your business;
- Overview of training opportunities that are currently available in your area and anticipated future opportunities;
- A stipend as compensation for time invested in this ONA process.

How Can I Learn More?

Please contact:

Sarah Pelton, Project Manager/Heather Robinet, Executive Director

projectmanager.quill@gmail.com or execdir@quillnetwork.ca

QUILL Learning Network

Moving Forward: Best Practices

The ONA process was initially conceived as a project that would include multiple conversations with managers, Human Resources (HR) representatives, supervisors, and employees. This would take the form of surveys, potential focus groups and follow-up discussions either on-site at the employer's workplace or virtually. Additionally, on-site observations of job tasks would be part of information-gathering where appropriate. Ultimately this approach proved to be unsuccessful primarily due to time constraints and difficulty with employers committing more than one or two staff to this process due to workforce shortages.

As a consequence, the approach to ONAs in QUILL region was adapted and ultimately included

- an introductory conversation about the ONA process and a brief discussion about key skill gaps and training needs
- a short initial survey (15 questions) to identify key training needs
- a request to review company information including
    - current training (onboarding and professional development)
    - past training experiences (anecdotal feedback or survey results)
    - job descriptions
    - hiring process documents
    - strategic plans (particularly those related to retention and succession planning)
- a follow-up conversation to more fully understand identified needs, hiring cycles, and current training processes
- a short follow-up survey focused on identified training challenges and opportunities (if possible)
- a final conversation to discuss feedback received and key points that would inform the ONA and ensure information was not misinterpreted or misconstrued

Challenges

In the small understaffed businesses that populate QUILL region, employers are frequently willing to assist with the identification of workforce challenges and training needs. They recognize the impact of low unemployment rates in this region combined with specific challenges including housing shortages (particularly lack of rental housing) and limited public transportation which make it difficult to attract and retain workers. Many have already worked with a number of community partners to assess and address training needs in various ways. However, many employers consulted for this project struggled to make time for another project when they feel they have already responded with feedback multiple times and have not seen significant movement towards addressing identified challenges.

It is also important to note that for employers, the type of training gap identified and the provider or institution who may be able to provide training to fill that gap is unimportant. Employers have identified needs ranging from skills aligning with Skills for Success categories – the focus of the current project – to higher-level management training or post-secondary qualifications. For employers, training recommendations need to incorporate training at all levels and accessing local training options should be as clear and straightforward a process as possible. Since QUILL region has multiple training providers – including LBS and other Employment Services programs, post-secondary institutions, and a variety of sector-specific training options – it is difficult for employers to quickly determine who is offering which types of training to local businesses. Additionally, they want to be able to quickly ascertain things like costs, availability of training, location, and time investment regardless of the provider.

Additional Observations and Approach Moving Forward

Feedback received from employers about this process suggests that future ONAs in QUILL region should incorporate the following criteria:

Leverage Existing Research: As local employers have often participated in needs assessments, projects related to attraction and retention, and other employer surveys and focus groups, it is extremely important that this existing research be used before approaching employers about an ONA. A thorough understanding of workforce needs, the impact of labour shortages, and the feedback previously received from employers is an important background step when approaching employers about participating in an ONA.

Short: Due to chronic staffing challenges and small workplaces, employers were not able to commit significant amounts of time to the ONA process. This was not because they did not believe this to be valuable but because, as one Human Resources manager said: they are too busy "treading water and putting out fires" to be able to sit down and have detailed conversations about training needs. Most businesses were willing to devote a short amount of time to this process as long as conversations were short, focused and did not require a time commitment from too many people within the organization.

Customizable: The ONA process must be flexible and responsive to the initial discussion with the employer and the results of the first survey. In our pilot project, the needs identified by the non-profit organization, for example, included volunteer training needs while those identified by manufacturing employers, for example, included numeracy as a key concern which was not identified at all by the non-profit. These differences prompted different questions in follow-up discussions and surveys. It was important that feedback received by employers at every stage of the ONA process dictated the next step. As a result, QUILL has created broad templates for discussion questions and surveys which would need to be adapted for any future ONA work depending on the particular business and their needs.

Asynchronous: Due to time constraints and more urgent work requirements, employers appreciated the opportunity to respond to questions and/or complete

surveys in their own time. It was difficult to find meeting times that would work – either in-person or virtually, as both options were given – for these businesses. Recognizing that participation will be higher when employers can work on responses when they have time to do so is one important take-away from this process.

Virtual: Employers we spoke to did not have capacity to have us on-site speaking to employees and/or facilitate a tour of the business. They were able to participate only if conversations were short and facilitated virtually or by phone.

Identification of Training Needs and Understanding of Skills for Success
Overall, as noted above, employers do not differentiate between training for entry-level positions and other training needed for their businesses. Though the purpose of this ONA process was to identify training aligned with Skills for Success and offered by Literacy and Basic Skills providers, for employers, discussions about entry-level training are not separate from discussions about professional development, industry-specific credentials and higher-level post-secondary opportunities.

Communication and Collaboration Skills for entry-level employees, high-potential employees, and early managers were most frequently identified as a training need. As has been the trend in workforce assessments more broadly, employers consulted for this project most frequently identified soft skills related to working with others as the most in need of training.

Reading and Digital Skills were identified in some areas. Reading was often specifically noted for employees working in English for the first time; this was identified as a relatively new training need and may be reflective of recruitment from urban areas where the population is more diverse and there is a greater proportion of immigrants. Local employers in QUILL region who are hiring employees whose first language is not English are adapting written material and training approaches to meet

these needs. In addition to ESL courses for these employees, Clear Writing reviews of key documents – particularly those related to safety and other company policies and procedures – were suggested.

Situating Skills for Success within broader training needs and plans: Training offered by LBS providers is typically one step in a much larger training framework for the employer. As such, working with partners who offer industry-specific training, micro-credentials or post-secondary certificates may be helpful for making referrals and guiding the employer through future training processes that cannot be entirely accommodated in an LBS training model.