

QUILL LEARNING NETWORK
ORGANIZATIONAL NEEDS ASSESSMENT
Processes, Observations and Best Practices
2024



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Executive Summary

As part of the Skills for Success Workplace Literacy project, QUILL conducted four Organizational Needs Assessments (ONA) between April 2023 and March 2024. Three ONAs were conducted with small non-profit organizations and one was undertaken as a collective assessment of entrepreneurs and small businesses participating in a weekly farmers' market.

As of March 2024, based on work conducted over the previous 18 months, it is our recommendation that unless there are significant changes in the labour market, additional ONAs conducted in QUILL region at this time are unlikely to generate new information. This report, and its companion from March 2023 reflecting information gathered during the [pilot phase of this project](#), serve as a guide to training needs in the region, how LBS can support these needs, and how an understanding of workplace training is closely tied to staffing shortages, business size, and the intersection between business needs and broader rural concerns including limited housing and lack of public transportation in most communities. As such, this summary report situates the ONA process within the unique landscape of rural communities. It is likely that many of the observations and challenges experienced in QUILL region are shared by other rural and remote areas across the province. This report, therefore, provides information that may be broadly applicable when assessing barriers to workplace training in rural communities.

What We Knew

Following the pilot phase (October 2022 – March 2023) of this project, we already had a greater understanding of employer needs as well as the challenges we might encounter when conducting ONAs in QUILL region. Overall labour market challenges persisted in this region during the year in which this project continued and unemployment rates returned to pre-pandemic levels. A small pool of available job seekers in the region has become even more pronounced with lower participation rates which means that this region has fewer people choosing to work, many of whom retreated from the workforce during the pandemic and have not yet returned. Chronic staffing shortages continue to make it difficult for businesses to find employees with the skills they need. This is particularly true for in-demand skillsets that are needed in multiple industries.

The economy in QUILL region is primarily made up of small businesses. Along the lakeshore, many of these businesses have seasonal hiring needs, resulting in a predictable cycle of recruitment and training for short-term employees during the summer months. Labour market shortages often have an outsized impact on small business for a variety of reasons. Smaller organizations frequently lack the staff and financial resources to commit to recruitment beyond the local region, and they are most often in competition with other businesses for employees with similar skills.

As was the case during the pilot phase, employers consulted for this project continued to report that

- their primary needs relate to short staffing and they need immediate assistance with recruitment and hiring strategies before investing time (and money) into training;
- they are increasingly hiring employees without all the necessary skills because there are so few job seekers;
- even once training needs have been identified, there is rarely time during which employees can pursue additional training without considerable impact to the organization;
- financial limitations continue to be a barrier to training, particularly for very small businesses and non-profit organizations.

What We Did

In this phase of the Workplace Literacy Skills for Success project, we intentionally reached out to employers and business groups that may not ordinarily be consulted for similar projects about training needs. While we were familiar with labour market shortages and how this impacts training across most sectors, voices from some business groups – including very small businesses and non-profit organizations – are often not as present in discussions about training needs and skill gaps. As such, we sought out and subsequently worked with those who may not otherwise be part of these conversations.

In order to do this, we appealed to non-profits who could benefit from an ONA for the purposes of succession planning, strategic planning, and/or providing valuable information for boards of directors and community stakeholders. Non-profits typically lack additional funding for this type of needs assessment and some were willing to undertake this process to help understand the impact of upcoming retirements or the impact of funding changes on future staffing and training needs. In particular, non-profits with longstanding Executive Directors were interested in exploring an ONA to understand ED succession planning, and those transitioning from working boards to governance boards were interested in providing information gathered through the ONA to their directors. One ONA was completed with a new non-profit organization that used this as an opportunity to discuss and plan for hiring and training that will take place in the future as the organization becomes more established.

In order to capture the needs of very small businesses, we worked with a local Business Improvement Area (BIA) that brings together 40-50 businesses for a weekly farmers' market during the summer months. In this way, we were able to conduct a collective ONA that was representative of small businesses and entrepreneurs in the region. This was one creative approach that allowed us to have discussions with employers who could share their needs and challenges without a significant time investment. Short, casual conversations that incorporated targeted questions about training needs worked best in this environment.

What We Learned

Ideal Approach to Conducting an ONA in QUILL Region

- **Meet employers where they are:** Instead of trying to set up meetings (either in-person or virtually), meeting very small employers at a farmers' market, for example, proved to be the most effective way to have short, meaningful conversations with a variety of business owners. While most would not have had time to devote to an ONA, they did have time for brief conversations if we approached them when they had a few minutes of spare time between customers. This enabled us to write an ONA that incorporated the experiences of a variety of small businesses in one area.
- **Discuss training needs within the context of labour shortages and challenges:** As we already knew that most employers were struggling with staff shortages, we began most ONA discussions with acknowledgement of this reality and an invitation to discuss how the labour market is impacting their business decisions. As training needs are not independent of workforce challenges, beginning with what we had already identified to be the key concern for most local businesses was the most effective way to discuss training. Working alongside businesses by first acknowledging the overwhelming labour shortages in this region was important.
- **Creatively approach ONAs by considering collective case studies that include a variety of voices:** With thousands of very small businesses populating QUILL region, it was initially difficult to assess their training needs. While each individual business has its own unique concerns, there are many challenges that are shared by businesses with very few, if any, employees. By working with a local BIA to conduct a case study incorporating feedback from many similar businesses in one region, we were able to conduct an ONA that broadly reflects the shared experiences of many small businesses.
- **Appeal to future opportunities and planning:** Although most businesses lack the time and resources to pursue training at this time, describing the ONA as part of a long-term opportunity was an effective approach. Situating the ONA within future strategic plans

and succession planning (particularly for key staff such as senior leaders and managers) was important for generating interest in this process. This was a particularly helpful approach when working with small non-profit organizations.

- **Engage with organizations in the growth phase of development:** One non-profit organization we consulted for this project is in the early stages of development and will have future hiring needs for both staff and volunteers. As such, the ONA was discussed as a key tool for identifying future training needs and creating appropriate job descriptions that align with the skills that will be needed for individual and organizational success once hiring begins.

Non-Profit Observations

Working with non-profit organizations for this phase of the project introduced and highlighted a number of additional considerations. Primarily, every non-profit organization consulted through this project is underfunded. Due to the uncertainty of grants, donations and other sporadic income sources, annual budgets are often tentative and in flux. COVID-19 has added to these existing pressures as donations are often lower than they were before March 2020. When financial resources are scarce, one of the first items to be eliminated from budgets is often training. Consequently, this is most often seen as a “nice to have” line item, rather than an essential part of the annual budget. Understandably, ongoing operational costs – such as costs to deliver programs – are prioritized. This complicates the training needs assessment process because most non-profit organizations can identify exactly the type of training that would be most beneficial for their staff and/or volunteers, yet they cannot commit resources to additional training.

As a result, the value to non-profits may not be in the form of identifying training needs and connecting them with available providers. Instead, many non-profits consulted for this project used the ONA process and report as additional information to give to Boards of Directors or other stakeholders as this information may provide important context for understanding

- difficulties with hiring and retention (due to competition for skilled staff and comparatively lower wages than private and public sector positions);
- chronic shortages of volunteers, particularly since the COVID-19 pandemic;
- succession planning challenges resulting in precarious future outlooks for many non-profits that anticipate retirements of senior staff, or challenges managing unexpected absences of key staff due to illnesses or other unpredictable leaves from work;
- lack of overlap of skills needed for key positions.

Small Business Observations

Small businesses – particularly those that are owner-operated – often identify their biggest obstacles as sourcing training and funding training. Due to often inconsistent work and sales, many business owners have slower periods throughout the year during which they could pursue targeted training if it met their needs. However, almost none of them have time or funding with which to pursue training, regardless of need. Training opportunities are most often directed to the owner-operator and one or two other individuals. However, in such businesses, the owner and other staff may not have clear delineations between job descriptions. All employees are typically involved in every aspect of the organization which can make it difficult to identify the most helpful training options for specific employees.

Observations of Seasonal Businesses

Seasonal employers may be hiring and rehiring staff on a regular basis which has consequences for training. Without permanent staff, training is both ongoing and not a long-term investment due to constant turnover. As such, training with this group needs to be short and very focused on immediate needs. With staff filling vacancies for only a few months at a time, they must be quickly upskilled without a significant time or cost investment on the part of the employer. Moreover, training providers must recognize that staff training is unlikely to be tied to retention or succession planning for these businesses. They will prioritize training staff on the skills they need for the current year's business demands; even with returning staff, significant training investments are unlikely as permanent employment is atypical for these businesses.

Challenges Conducting an ONA in QUILL Region

Without a financial incentive for employers, it was very difficult to find businesses willing to participate in this phase of the project. As was the case during the pilot phase, employers we spoke with between April 2023 and March 2024 were not unaware of training needs and how upskilling could help meet current and future business demands. They were, however, understaffed and focusing their limited time on hiring strategies which left most without time to commit to an ONA. Moreover, of those who were able to participate in an ONA, nearly all are unable to commit to training at this time. While the process was valuable for those who participated, training needs are not an immediate priority for most employers in QUILL region. Consideration of this will be important for any future projects with a similar focus.

In both the pilot phase and the second year of this project, common feedback from employers was that they are prioritizing recruitment over training, they lack time and finances to pursue additional training, and most felt they had previously shared similar information with other organizations/projects in the region. Given this, any approach to ONAs in the future must be mindful of information previously gathered through this project and through other similar processes (e.g., Business Retention and Expansion reports, EmployerOne surveys, etc.). As a group, local businesses lack the time to respond to additional questions and/or release their staff for consultation in processes such as this. It is, therefore, incumbent upon organizations embarking on these employer-consultation projects to ensure we have thoroughly researched and effectively used all available information before reaching out to employers.

How Training Needs are Prioritized

As was noted during the pilot, employers consulted for this phase of the project were not interested in the distinctions between different training providers. While it is important to them to be connected with locally available courses – as well as funding options, such as Canada-Ontario Job Grant, for example – they are relatively unconcerned about differences between training offered by LBS providers and training offered elsewhere. Given this initial feedback, QUILL created a searchable asset map sharing available local and online workplace training that may assist local businesses. This will be circulated throughout the region in April 2024.

As was the case during the pilot project, the most requested training included

- soft skills (particularly communication and adaptability);
- digital skills;
- early management and leadership training;
- professional development.

Employers with younger employees and recent hires were most likely to identify soft skills as important training needs. Those with longstanding employees, and anticipated future staff turnover, were more often concerned about finding new employees in the region with experience in management, human resources, financial management, or project management. Small organizations and non-profits were particularly concerned about the difficulties they have attracting employees with these skills when they are competing with larger organizations in the public and private sectors that typically offer higher salary and benefits packages. Almost all employers expressed how finding employees with workplace skills needed for success is becoming increasingly difficult, yet prioritizing training is secondary to staffing shortages.

Training Processes and Approaches Frequently Requested

- **On-Site Training:** Given financial and time limitations, almost all employers would prefer to have training conducted at their place of business and/or at a central location for those with multiple work sites. In rural communities, the added cost of transporting

employees and/or volunteers to a different location for a training session is often impractical and prohibitive.

- **Group Training Opportunities:** In several ONAs conducted this year, managers and business owners spoke about the difficulties they face when trying to bring all staff (and volunteers) together. In organizations with multiple geographical sites, those with multiple shifts, and/or those with diverse departments and job tasks, there are often very few opportunities to have everyone together. Given this, several leaders would prefer training that is combined with team-building or strategic planning, and provides an opportunity to bring everyone together for a day. This type of team-building and networking – when combined with training options – was identified by several organizations as an ideal approach to training within their respective organizations.
- **Thinking Outside the Box:** Given that most businesses are unable to commit to training at this time, many discussions revolved around what ideal future training might look like and how small, under-resourced organizations can continue to build skills within their organizations. This requires creative approaches and a willingness to brainstorm and attempt to coordinate or connect businesses with resources they may not have previously considered.

What LBS Programs Can Do

In order to meet the identified needs of local businesses and remain cognizant of how training needs are largely de-prioritized in this region at this time, the following considerations are important when assessing how LBS programs can assist with workplace training:

- **Continue to be Adaptable and Resourceful:** LBS programs in QUILL region need to continue to adapt and create programming that can be advertised to employers. Though the majority are not ready for training, many do not yet know that LBS workplace training programs are available to them free of charge and can be customized to meet their needs. As part of its core mandate, QUILL will continue to share information about LBS training with employers as frequently as possible.
- **Network and Refer:** In small communities, networking and referring is critically important. Referrals to other training providers, as necessary, are an important part of meeting local business demands. The most frequently identified training needs in this process were often post-secondary or industry-specific credentials. Recognizing that meeting workplace training needs often goes beyond offering assistance through LBS programs is an important part of meeting this need. It is our observation that employers are first looking at meeting needs related to specific skills – e.g., competencies related to bookkeeping, accounting, social media advertising, or human resources – as these have often been identified as most critical to business operations.
- **“No Wrong Door” Approach:** One important observation from the ONA process was that employers are often so overwhelmed that they do not know where to look or who to ask for help. This includes sourcing information about training as well as any other business challenges such as finding a small business accountant or understanding how goods can be sold at local markets or town events. It is important that when businesses consult LBS staff, they are also introduced to other services in the region and are able to help and direct people elsewhere if needed. Even if LBS providers are not those who can meet their immediate needs, they can continue to assist businesses by sharing relevant information from community partners as needed.

Advertising and Outreach

As was the case during the pilot phase, between April 2023 and March 2024, a significant amount of time was invested in reaching out to employers and business groups in a variety of ways. Trying to market ONAs was an ongoing challenge. We continued to connect with community partners including Employment Service providers, Economic Development, industry organizations, Chambers of Commerce, Business Improvement Associations, and spent time cold calling individual businesses and walking into businesses to share information about the project in person. Ultimately, the majority of these approaches were time-consuming and unsuccessful. Those that agreed to participate were businesses familiar with QUILL and its project staff and/or those referred by businesses that had previously participated in the ONA process during the pilot phase. Despite considerable marketing efforts and social media outreach, it was extremely difficult to find participating businesses.

An additional barrier this year that hindered outreach efforts was the inability to offer a stipend for employer participation. As such, QUILL relied heavily on existing employer connections, word of mouth, and referrals from employers who had previously participated. Discussions within the Community of Practice for Workplace Literacy suggest that this was a challenge shared by many networks in rural and remote communities.

Please see Appendix A for advertising information that was shared within QUILL region for this project.

Additional Observations

Echoing what was observed during the pilot phase, the greatest challenge for employers continued to be finding time to participate in the ONA process. It is important to note that none of the employers we consulted for this project believe that identifying and meeting training needs is an unimportant undertaking. Most are quickly able to identify training needs and the potential liability of not upskilling employees in key areas. However, training is contextualized within broader business needs and considerations including

- ongoing recruitment and hiring needs;
- challenges with cyclical or seasonal hiring and training needs resulting in employee “churn” throughout the year;
- training limitations for small businesses without the resources to release staff for training even when needs are identified;
- difficulties prioritizing training when there are greater business needs requiring time and financial resources.

Due to the challenges encountered with the ONA process, and the subsequent inability of most employers to commit to employee training at this time, it is important that ONAs meet employer needs in different ways. One important observation that emerged from this process is lack of coordination. For employers, who offers training is relatively unimportant. What is more important is understanding regional training options and if and how training offerings meet criteria such as

- what type of training can be accessed in the local area?
- can training be offered online or in-person?
- is training offered free of charge or is there a fee for service?
- are there training subsidies available? If so, how can they be accessed?
- is training customizable?
- is training individualized or available to very small groups?

In partial response to this observation, QUILL has created an asset map to help employers connect with relevant training when and if they have capacity to pursue this with their

employees. This list of resources is available on the QUILL website, and will be advertised throughout the region through LBS providers and community partners in April 2024.

Moving Forward: Best Practices

At the conclusion of 18 months of this project (including the pilot phase), it is clear that employers face considerable challenges, many of which are unique to rural communities. Because of this, conducting ONAs in QUILL region requires creative approaches, as does situating Skills for Success within an overall understanding of business needs.

As identified in the pilot phase, QUILL region is comprised of small rural communities and most people are employed by small businesses. Added economic pressures include the seasonal nature of many industries, the increasing cost and decreasing availability of housing, and almost non-existent public transportation between most towns. This makes it incredibly difficult to attract new employees to the region, and makes it even more imperative that businesses are able to retain existing employees.

Many small businesses recognize the extent to which they are reliant on one, or very few, key employees. They further understand the difficulties they could face if these staff were to leave. In small businesses, there may be very little cross-training for key tasks which can make it difficult to manage unexpected staff absences. This means that many small employers are often struggling constantly with day-to-day business demands because there is infrequently someone who can easily step into a role when another staff member is absent.

Additionally, small businesses typically lack human resources and training departments, and many do not have strategic plans or long-term objectives related to staffing needs and succession planning. While this is not unique to small businesses in QUILL region, it does make this region extremely vulnerable to labour market changes.

The fundamental challenge most businesses have is not identifying training needs, which is the primary purpose of an ONA. Rather, their primary challenge is finding enough staff and ensuring that current staff can keep up with business demands. This can be a daily struggle and adds to the chronic stressors often experienced by business owners.

While information gathered throughout this process offers additional context concerning the relationship between labour market conditions, hiring challenges, succession planning, and training needs, the majority of businesses do not have time to contribute to an ONA. Most are already aware of their training needs and many have shared this information elsewhere. In order to most effectively meet their needs, QUILL, LBS providers, and other community partners must focus on consolidating, sharing, and explaining information related to training as well as how this relates to other associated factors impacting labour market dynamics.

While ensuring that information about workplace training offered by LBS is shared widely, meeting the needs of local businesses also requires marketing professional development, business ownership/entrepreneurship training, industry-specific training, and all other courses that can help local businesses thrive.

While the ONA process has given us greater insight into some of the common training needs and challenges experienced by local businesses, much of what we have learned through this process is information that was previously known. This is helpful because the process of conducting ONAs has reinforced and amplified existing knowledge – both anecdotal and data-informed – which can help point to areas of need that have either remained or grown since the COVID-19 pandemic which significantly disrupted workplaces everywhere.

Very few businesses in QUILL region had time to participate in the ONA process. Of those that did participate, the majority are not in a position to pursue any type of training at this time. Moving forward, it is our recommendation that ONAs recommence only if there are significant changes to the local labour market and/or significant changes to workplace training options in the area. In QUILL region, the most urgent concern faced by almost all businesses is not the identification of training needs, but the chronic shortage of staff in a tight labour market. As such, this region is not well-positioned to continue with similar projects if assistance with labour shortages is not a key part of the discussion and a first step towards addressing complex business needs.

FREE WORKPLACE TRAINING NEEDS ASSESSMENT

Are you struggling to recruit and retain workers with the right skills to meet the demands of your business?

QUILL Learning Network is partnering with employers to:

- ✓ Assess workplace needs
- ✓ Align identified needs with local training options
- ✓ Help employees build skills for longterm success



PARTICIPATING BUSINESSES WILL RECEIVE:

- ✓ FREE EVALUATION OF YOUR TRAINING NEEDS
- REPORT OUTLINING TRAINING NEEDS AND OPPORTUNITIES
- FREE CLEAR WRITING REVIEW OF KEY WORKPLACE DOCUMENTS

Available until
March 2024

FIND OUT MORE

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DID YOU KNOW?



QUILL Learning Network offers free training needs assessments to businesses in Bruce, Grey, Huron, Perth, and South Georgian Bay.

To find out more, please visit www.quillnetwork.ca or contact projectmanager.quill@gmail.com





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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.

How Can I Learn More?

Please contact:

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QUILL Learning Network