

A Fenman Video Resource

THE LEARNING NEEDS INTERVIEW

by

Hugh Murray

Published by:
Fenman
Clive House
The Business Park
Ely
Cambs CB7 4EH

Telephone: (01353) 665533
Fax: (01353) 663644
E-mail: fenman@dial.pipex.com
Web: www.fenman.co.uk

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Section 1 Summary Overview

Who is this programme for?

It is for:

- Professional trainers and consultants
- Managers and supervisors who need to help their people develop.

What does this programme do?

It helps managers:

- Understand the importance of the learning needs interview
- Understand their role in carrying out the learning needs interview
- Learn the key principles in carrying out the learning needs interview
- Develop the skills to carry out the learning needs interview.

Why is this programme necessary?

Because:

- Organisations have to be better at learning than in the past
- The culture of learning has to be decentralised and widely spread
- Learning has to be tailored much more to individual needs
- Employees are demanding support in developing themselves
- Responsibility for development is moving on to managers.

How does the programme achieve its objectives?

- By means of a self-study programme
- By providing material for a one hour training session
- By providing material for a half-day training session
- By providing support to a range of existing courses.

Where can the programme be used?

- At home or in a resource centre
- In an office or meeting room
- In a management training centre.

How long does the programme take?

- Two hours self-study, or
- One hour training session, or
- Half a day training session.

Section 2 How to use this pack

Structure of the pack

This pack has been designed for managers who wish to be able to carry out a learning needs interview with their staff and for trainers who wish to help them develop this ability.

The pack contains:

- A one hour training session which can be run by a trainer or manager
- A half-day training session which can be run by a trainer
- A self-study section which a manager can work through in two hours.

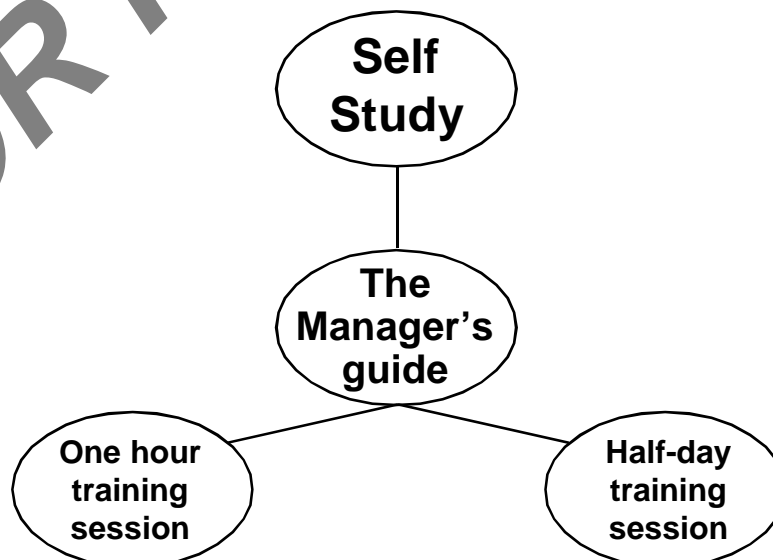
All three components share a section entitled, *The Manager's Guide to the Learning Needs Interview* which, along with the video, contains the key ideas about the subject.

At the end of this guide is a section dealing with S/NVQ's and how these relate to the pack.

What to do now

If you are a trainer, read through the whole pack to get an idea of the contents. Although we have provided structures for one hour and half-day training sessions, you may well get ideas from different parts of the pack which you can incorporate into your existing or new training sessions.

If you are a manager studying alone, go straight to the **Self-Study** section and work from there.



Section 3 The Self-Study Module

It will take you about two hours to work through this section on your own. The objectives in doing so are:

- To obtain a better understanding of your role within a learning needs interview
- To gain an understanding of the key principles when undertaking the interview
- To become more aware of the techniques needed to develop those skills.

Resources

- Quiet work area
- VHS player, TV and headphones, if preferred
- The tape *The Learning Needs Interview*
- Note pad and pen/pencil
- Photocopiable Handouts 1 and 2 at the back of this guide

Your background

This session is for you if you are a manager or a supervisor who has responsibility for developing your staff.

Session plan

Activity	Duration
Why carry out a learning needs interview?	10 mins
What is your role in the interview?	5 mins
What is the role of your interviewee?	5 mins
Watch the video	25 mins
Break	10 mins
Analyse three main scenes	30 mins
Read <i>The Manager's Guide to the Learning Needs Interview</i>	20 mins
Carry out a learning needs analysis on yourself	15 mins

Why carry out a learning needs interview?

Take a piece of paper and write, “Why carry out a learning needs interview?”

Set yourself the goal of coming up with **four** reasons why you should carry out learning needs interviews with your staff.

When you have listed your ideas, turn to page 13 to read our thoughts on this.

What is your role in the interview?

Now take a second piece of paper and head it, “What is my role in the interview?”

Set yourself the goal of coming up with three distinct roles.

Then turn to page 14 to read out thoughts.

What is the role of your interviewee?

Take a third piece of paper and head it, “What is the role of my interviewee?”

Try to come up with **two** distinct roles.

Turn to page 14 to read our thoughts.

Watch the video

Make yourself comfortable, sit back, concentrate and watch the video.

You have been going for some time now. Take a break, stretch your legs and have a drink.

Analyse three main scenes

The three scenes you should analyse are:

- Paul and Robert (beginning of video only)
- Ciaran and Marguerite
- Isobel and Marguerite.

Take a fresh piece of paper for each scene. Write out the following questions, with half a dozen or so lines under each one:

Paul and Robert

- What did Paul do that was good?
- What criticisms would you make of Paul’s approach?
- How do you think Paul saw his role in the discussion?
- How do you think Paul saw Robert’s role?
- What was the likely effect of the discussion on Robert?

Ciaran and Marguerite

- How do you think Ciaran saw his role in the discussion?
- What criticisms would you make of Ciaran?
- What do you think Ciaran did well?
- What was the likely effect of the discussion on Marguerite?

Isobel and Marguerite

- How do you think Isobel saw her role in the discussion?
- What was effective in Marguerite's approach to Isobel?
- What criticisms would you make of Marguerite's approach?
- What was the likely effect on Isobel of the discussion?

Write a few lines of thoughts in response to each question.

When you have done this, turn to pages 15-16 to compare your thoughts with ours.

Read *The Manager's Guide to the Learning Needs Interview*

You will find this on page 28 of this guide.

Carry out a learning needs analysis on yourself

Use the forms on pages 38-39. Choose just one objective that you have to achieve. Write it out in the left hand column. You should aim to include:

- Exactly what you are trying to do
- When you aim to finish it
- How you will know when you have succeeded.

If you are familiar with SMART, use the SMART formula. This states that objectives should be:

Specific

Measurable

Achievable

Realistic

Time bounded

Some people say stretching rather than specific and some say rewardable rather than realistic, because realistic and achievable imply the same thing. The important points are that objectives should be **clear, measurable and time bounded**.

When you have done this think carefully about the skills, attitudes and knowledge that you need to reach your objective. Use the form on page 39 for this. Think about this without reference to your own state of competence.

When you have identified the skills, attitudes and knowledge that the objective requires, identify the gaps, if any, in your own skills, attitudes and knowledge, and enter these in the learning needs column.

Our thoughts on the questions

Why carry out a learning needs interview?

There are a number of reasons why you should do this. You may well have come up with some ideas that we have not thought of, and they may be entirely valid. Our thoughts are not definitive. They are intended to stimulate you to think about your own situation.

Background

- Organisations need to be much better at learning than in the past. This can only be achieved if a culture of learning spreads throughout the organisation. This means that learning can no longer only be the responsibility of a central training department. Individual managers must now do their share. They should aim to inspire the people they manage with the desire to learn, or develop in them an awareness of the benefits of learning.
- Learning must now be more defined and tailored to suit individual needs - this is due to the increasing complexity of organisational life. This means that general training courses for all, whilst still valuable, are no longer a complete solution for an organisation. This new style of learning can only be carried out if individual learning needs are assessed, and it is only practicable to do this centrally in the smallest organisations. So managers must now carry out the assessment of learning needs.
- One of the key levers a manager possesses to improve the effectiveness of his or her team is the ability to upskill the individual team members. A manager who does not take responsibility for the development of individuals in his or her team is ignoring one of their key tools.

Reasons for carrying out the learning needs interview

- To gain the learner's commitment to learning
- To identify learning needs
- To motivate people
- To build rapport with people
- To show that the organisation cares To develop a learning culture
- To find out what people actually do.

What is your role in the interview?

As before, there is no reason to suppose our thoughts to be any better than yours. However, there is one idea we do feel strongly about:

Your role is limited. You cannot make people develop. All you can do is help the learner think through their own learning needs. **Your role is to help the learner think it through.**

Other roles include:

- To provide expert advice
- To challenge the learner's thinking
- To draw the learner's attention to things s/he may overlook.

What is the role of your interviewee?

In short, to **contribute**. You can provide the environment and support, but your interviewee must actively join the process. Without his or her active participation, no good will come from the interview.

If you have come up with a second role, you have done better than we did!

Analysis of three main scenes

You will have come up with answers of your own, which may be entirely valid. Our thoughts are for comparison.

Paul and Robert

What did Paul do that was good?

He tried. He did at least address the issue of learning needs. He also asked Robert for his opinion.

What criticisms would you make of Paul's approach?

He did not address Robert's objectives and aspirations.

He told Robert what he needed to learn, rather than help him think it through.

He did not listen well.

How do you think Paul saw his role in the discussion?

We can only guess. It is likely that he did not see his role as being to support Robert. Probably, he saw it as his role to tell Robert about his weaknesses & what needed to be done to address them.

How do you think Paul saw Robert's role?

Again, we can only guess. It appears that Paul did not see Robert as having a role in arriving at an analysis of learning needs. He probably saw Robert's role as being to learn from him, Paul.

What was the likely effect of the discussion on Robert?

It is hard to imagine that Robert would feel anything other than demoralised by the discussion. Although he had no choice but to comply with Paul's view, that he, Robert, needed telephone skills training, he was clearly not committed to that view and so he would be unlikely to benefit from the training. In any case, we later learned that such training would be addressing entirely the wrong issues.

Ciaran and Marguerite

How do you think Ciaran saw his role in the discussion?

Ciaran certainly appeared to see his role as one to enable Marguerite to arrive at her own conclusions. There is no evidence to suggest that he felt he should tell her what to learn.

What criticisms would you make of Ciaran?

Ciaran did not appear to have done much, if any, preparation for the meeting. His confidence in Marguerite would account for this. He was slightly caught out when Marguerite admitted that she had not come up with any strong learning needs. Arguably, Ciaran could have anticipated this and moved more quickly onto longer term aspirations. He seemed to flounder a bit in the middle of the interview before he picked up direction again by refocussing on longer term objectives.

It is also possible that Marguerite did have some short-term learning needs. Ciaran failed to uncover any. Had he given more thought to the matter before the meeting, he may have been able to steer her towards some stronger short-term needs, rather than her own vague ideas on project management.

What did you think Ciaran did well?

He certainly created a very warm and supportive atmosphere.

He succeeded, after a little floundering, in guiding Marguerite into an active consideration of her own learning needs as they related to her longer term aspirations.

He conveyed a very supportive message and left Marguerite in no doubt that he would help her in any reasonable way, though the prime responsibility for her development lay with her.

What was the likely effect of Marguerite of the discussion?

Marguerite ended the discussion energised and positive. In all probability, she would have been motivated and stimulated by the discussion.

Isobel and Marguerite

How do you think Isobel saw her role in the discussion?

Isobel appeared to think her role was entirely passive. She was expecting Marguerite to solve her problem for her by prescribing not only her learning needs, but also how she was going to address them.

What was effective in Marguerite's approach to Isobel?

She adopted a fairly forceful approach to drive home to Isobel that she had a role to play. By the end of the meeting, Isobel had accepted this.

Marguerite also succeeded in focussing Isobel's attention on what she was trying to achieve, not simply on what she did not know.

What criticisms would you make of Marguerite's approach?

Marguerite had not prepared for the meeting. This was inevitable in view of the spontaneous nature of it. It is clear, however, that Marguerite did not have any idea of what Isobel might have needed to learn, and so she was only able to talk in general terms. Had she had time to think about Isobel's needs she might have been able to move a lot further in the meeting. So it is arguable that she should not have called the meeting immediately, but should have set a later date for a meeting.

The meeting also went round in a circle at one point, with Isobel simply repeating that she did not know how to proceed. Marguerite could have moved more quickly to her eventual approach of asking Isobel to analyse the attitude, skills and knowledge needed for each aspect of the job.

It is also possible that Marguerite could have given more support to Isobel (without taking the responsibility away from her) by working through one or two key areas of the job with her in order to show her exactly how to proceed.

What was the likely effect on Isobel of the discussion?

We need to be realistic here. Isobel is certainly not going to leave the discussion highly motivated to explore her learning needs as a changed person. However, this discussion could be the beginning of a process that will, eventually, lead to such a change. Initially, Isobel may well feel suspicious, hard-done-by, and fairly negative. However, she at least has a plan of action to take her forward. Depending on how she and Marguerite handle the subsequent meeting, this could change and she could begin to take responsibility for her own development in the future.

Section 4 One hour training session

The objectives of this one hour training session are:

- To help participants understand their role in learning needs interviewing
- To enable participants to carry out a simple learning needs interview, which:
 - focuses on learning outcomes rather than inputs
 - gains the learner's commitment to addressing the learning needs.

One hour is not much time to bring about behavioural change, so the goals of this session are limited.

Resources

- Meeting room for a small group
- TV/monitor and VHS player
- The Tape *The Learning Needs Interview*
- Sufficient photocopies of *The Manager's Guide to the Learning Needs Interview* taken from this guide
- Flipchart or Overhead Transparency Projector with Pens and blank acetates
- Photocopiable Handouts 1 and 2 at the back of the workbook.

Number of participants

This short session is ideal for a small group of three to eight participants.

Participants' background

Managers and supervisors whose role includes helping their people learn.

Session plan

Activity	Duration
Introduce the session	5 mins
The manager's role in the learning needs interview	10 mins
Show the video	25 mins
The manager's role in the learning needs interview	5 mins
Gaining the learner's commitment	10 mins
Ending the session	5 mins

Introduce the session

Introduce the session by explaining the objectives of the session.

The manager's role in the learning needs interview

Lead a discussion on the manager's role in learning needs interviewing. If the group is five or more, break it down into smaller groups of two and three. Otherwise work with the whole group. Ask the question (using the flipchart or projector if you prefer):

“What are at least two reasons for carrying out a learning needs interview?”

Allow the group(s) five minutes to discuss this amongst themselves. Then ask for their conclusions, using the flipchart or projector to record their answers.

Most groups will agree that finding out learning needs is one reason. You may well find some other interesting reasons, many of which will be valid. If ‘gaining commitment’ from the learner has not come up, add it in yourself at this stage.

Show the video

Although it is tempting to duck out while this is running, especially if you have seen it many times, we recommend that you remain and watch the video yourself.

The manager's role in the learning needs interview

After the video, point out that Paul's approach at the start of the video was clearly ineffective. Ask your group(s) what might have been Paul's understanding of his role in the process at the outset of the video. Allow a few minutes for this discussion and then invite people to contribute answers.

Most groups will realise that Paul did not understand his role properly. He clearly felt that it was his role to prescribe for Robert a learning 'medicine' for what he, Paul, saw as Robert's shortcomings. If this does not come up, add it in yourself at this point.

Now ask the group what the manager's role should be in the process. Most groups will respond that the manager's role is to help the learner think through their learning needs and is not to tell them what those needs are. Make sure that this point emerges, by adding it yourself if necessary.

Gaining the learner's commitment

Explain that a key aspect of learning needs interviewing is to gain the learner's commitment. Ask the group(s) to identify:

- three examples of behaviour (of the manager) which will tend to undermine that commitment
- three examples which will tend to support it.

You are likely to get a number of answers to this question. Amongst those that undermine commitment are:

- Telling the learner what s/he needs to learn
- Disagreeing when the learner tells you they can do something
- Poor listening skills, including interrupting and not hearing
- Body language which contradicts what you are saying. For example, sitting back in your chair with your hands behind your head, looking up at the ceiling and saying, "I don't want you to think of me as your boss for this meeting. Think of me as your equal".

Amongst behaviour which tends to support commitment are:

- Praise for abilities the learner has demonstrated
- Sympathetic listening
- Effective questioning technique
- Honest disclosure of your own lack of skills etc where appropriate.

There will be many more. The value comes from the discussion as much as from the actual conclusions that people reach.

Ending the session

Your hour will now be up. Thank everyone for their time and give each person a copy of *The Manager's Guide to the Learning Needs Interview*.

FOR PREVIEW ONLY

Section 5 Half-Day Training Session

The objectives of this half-day training session are:

- To help participants understand their role in learning needs interviewing
- To help participants understand the principles underlying successful learning needs interviewing
- To enable participants to carry out a range of learning needs interviews successfully.

Resources

- Meeting room for a small group
- TV/Monitor and VHS player
- The Tape *The Learning Needs Interview*
- Sufficient photocopies of *The Manager's Guide to the Learning Needs Interview* taken from this guide
- Flipchart or Overhead Transparency Projector with pens and blank acetates
- Photocopiable Handouts 1 and 2 at the back of the workbook.

Number of participants

Between four and twelve.

Participants' background

Managers and supervisors whose role includes helping their people learn.

Session plan

Activity	Duration
The importance of Learning Needs Interviews within the organisation	15 mins
The objectives of Learning Needs Interviews	15 mins
Show the video	25 mins
Analysis of key scenes	30 mins
Break	15 mins
Problems and how to overcome them	30 mins
Preparation for role-play	15 mins
Role-play	30 mins
Debrief, summary and close	30 mins

The importance of Learning Needs Interviews within the organisation

Run through the learning objectives for the session.

Explain why it is important within your organisation for managers to carry out learning needs interviews. Your explanation will depend on the approach your organisation is taking, but there are some points which are generally true:

- Organisations need to be much better at learning than in the past. This can only be achieved if a culture of learning spreads throughout the organisation. This means that learning can no longer only be the responsibility of a central training department. Individual managers must now do their share. They should aim to inspire the people they manage with the desire to learn, or develop in them an awareness of the benefits of learning.

-
- Learning must now be more defined and tailored to individual needs - this is due to the increasing complexity of organisational life. This means that general training courses for all, whilst still valuable, are no longer a complete solution for an organisation. This new style of learning can only be carried out if individual learning needs are assessed, and it is only practicable to try to do this centrally in the smallest organisations. So managers must now carry out the assessment of learning needs.
 - One of the key levers a manager possesses to improve the effectiveness of his or her team is the ability to upskill the individual team members. So a manager who does not take responsibility for the development of individuals in his or her team is ignoring one of their key tools.

These are ‘employer push’ reasons. In addition, there are ‘employee pull’ reasons. It is a fact of life that job security, if it ever existed, does not exist today. The only security an individual has is his or her ‘employability’. Forward thinking employees are therefore taking steps to raise their own skill levels. They are demanding that their employers support them in this process and they are seeking out opportunities to discuss their personal development with their employers.

The objectives of Learning Needs Interviews

Divide your participants into small discussion groups of three to five people. Ask the following question:

“What are four reasons why you should carry out a learning needs interview?”

Allow ten minutes for this discussion. The purpose of asking for four reasons is to prevent the groups from all reaching the same conclusion - to identify learning needs - within thirty seconds.

After the ten minutes, or when discussion has died down, invite answers to the question.

Sample replies include:

- To identify learning needs
- To motivate people
- To build rapport with people
- To show that the organisation cares
- To develop a learning culture
- To find out what people actually do.

All of these and many more are perfectly valid. There is one reason that you **must make sure comes up**, and it is:

- To gain the learner's commitment to undertake learning.

Hopefully, this will emerge from the group, but you should draw attention to it if it does not and explain that the foundation of any learning programme is that the learner agrees that he or she needs the learning. Without that, no learning will take place.

Show the video

This lasts for about 25 minutes.

Analysis of key scenes

Divide the participants into three small groups.

Allocate one of the following scenes to each group:

- Paul and Robert at the beginning of the video
- Ciaran and Marguerite
- Isobel and Marguerite.

If you have insufficient participants, then drop Ciaran and Marguerite and/or Isobel and Marguerite.

Each group will now work in parallel on their scene for twenty minutes, allowing you ten minutes before the break to pull the discussion together.

Give the following questions to the appropriate groups:

Paul and Robert

- What did Paul do that was good?
- What criticisms would you make of Paul's approach?
- How do you think Paul saw his role in the discussion?
- How do you think Paul saw Robert's role?
- What was the likely effect on Robert of the discussion?

Ciaran and Marguerite

- How do you think Ciaran saw his role in the discussion?
- What criticisms would you make of Ciaran?
- What do you think Ciaran did well?
- What was the likely effect on Marguerite of the discussion?

Isobel and Marguerite

- How do you think Isobel saw her role in the discussion?
- What was effective in Marguerite's approach to Isobel?
- What criticisms would you make of Marguerite's approach?
- What was the likely effect on Isobel of the discussion?

After twenty minutes, or whenever the discussion dies away, ask the group as a whole for their reactions to the questions. You will have your own ideas as to what to look for in the answers to these questions. On pages 14-16 in the self-study section of this guide, you will find our thoughts on these questions for comparison.

Finally, pose the question:

“What should be the manager's role in learning needs interviews?”

A number of valid answers will probably arise. You need to make sure that **to help the learner think through his or her learning needs** is amongst them.

If all has gone according to plan, you should have been working for about an hour and a half and people will be ready for a break.

Problems and how to overcome them

This is an opportunity for your participants to address concerns they may be feeling.

Divide your participants into groups of three to five, mixing people in different ways if possible.

Pose the following questions:

- How do you expect your staff to feel about learning needs interviews?
- What problems do you anticipate in carrying out such interviews?
- How would you address these problems?

Allow fifteen minutes for the groups to discuss these questions.

Then hold a discussion with the whole group in which these issues are raised and possible solutions are put forward.

We cannot advise you on how to handle specific concerns because these will differ between organisations and groups. However, there is one key principle which should reduce most concerns. **It is the manager's responsibility to help people develop themselves. It is not their responsibility to develop them.**

If the employee is simply not interested in developing him or her self, or refuses to see it as their responsibility, there is nothing further you can do. The manager can only go so far in being supportive. Beyond that, it is up to the employee to take responsibility. Even if the organisation rammed training down the throat of people who were not prepared to take this responsibility, it would not work.

The biggest help you can give to your participants is to help them understand their role in this way.

Preparation for role-play

The purpose of the role-plays is to help people start to put into practice the ideas from this training session. The idea is to divide your participants into two groups: As and B's. For fifteen minutes, the A's will interview the B's. Then for fifteen minutes the roles will reverse. If you have an odd number of participants, one person will have to observe one of the role-plays and a different person will have to observe another.

In many role-plays, participants are asked to play a role other than their actual selves. In this case, you are going to ask participants to play themselves. Each participant is going to carry out a learning needs interview on a colleague, using their **real objectives & learning needs**.

Allow fifteen minutes for preparation. Allow the first half of the time for participants to identify two real objectives or tasks which they have to undertake in their jobs.

Allow the second half of the time for participants to prepare to carry out a learning interview by preparing questions to ask their colleague.

Remind participants that they should spend the first few moments of the role-play on creating a suitable atmosphere. After that, they should direct the conversation towards objectives and aspirations. Suggest that they prepare a sheet for attitudes, skills and knowledge for each of the two objectives and remind them about the importance of summarising any agreement reached. The photocopiable Handouts 1 and 2 at the back of the workbook can be used to prepare these lists. Use one sheet for each objective.

Role-play

Allow fifteen minutes for the As to carry out a learning needs interview on the B's. Then allow the same time for the B's to carry out a learning needs interview on the A's

Debrief, summary and close

Ask participants to discuss how they felt the role-play worked. Ask what they found easy and what they found difficult.

If you have time, allow participants to write down a few key areas that they, as individuals, would like to concentrate on in order to develop their technique.

Summarise the key points that have come out of the session.

Give out copies of *The Manager's Guide to the Learning Needs Interview* copied from this guide.

Thank participants for their time and close the session.

Section 6 The Manager's Guide to the Learning Needs Interview

What is the learning needs interview?

It is a discussion between you, as manager, and a subordinate colleague, to agree with him or her what skills, knowledge and attitudes he or she needs to acquire.

Why have a learning needs interview?

- To find out what learning needs an individual has
- To gain agreement with, and commitment to those needs.

Both purposes are equally important. You cannot ascertain a person's learning needs without their involvement. Even if you are sure you know what a person's needs are, this information will be of no use unless that person agrees with you. A person is only going to learn if they are committed to the process, and they must see the need for learning before that is possible.

When should you have a learning needs interview?

Whenever necessary. At the very least, you should carry out one a year. This annual interview can be part of the appraisal interview, or it can be a separate discussion. You should be on the lookout for learning opportunities all the time, and should not hesitate to discuss learning needs whenever you think there are things your people need to learn.

The video part of this programme demonstrates the formal interview (Robert and Paul) and the ad-hoc discussion (Isobel and Marguerite). The objective is to understand the principles of learning needs interviewing and to be prepared to apply them in formal and informal circumstances.

The key principle

The key principle is to focus on what the learner is trying to do in their job. Then relate the outcomes of the learning to what the person is trying to do. So the process should be:

- What am I trying to do?
- What skills, attitudes and knowledge do I need to be able to do it?
- How does this compare with my current skills, attitudes and knowledge?
- What are the skills, attitudes and knowledge I need to develop?

And only then can you ask:

- How should I acquire or develop these skills, attitudes and pieces of knowledge?

A learning needs interview will only have been successful if you and the learner agree on exactly what the learner is trying to achieve at work and if you both agree on what skills, attitudes and knowledge the learner needs to develop or acquire in order to achieve it.

You need to consider short and long-term learning needs. People have short-term objectives or tasks, but they also have longer term aspirations. You need to consider a person's aspirations, such as what they would like to achieve in the longer term, as well as what they need to know today.

The other principles

Focussing on what the learner is trying to achieve may be the key principle, but you will not succeed without being aware of the other principles.

These are:

- Help the learner think it through
- Gain the learner's commitment, not compliance.

Your role is to help the learner to identify their own learning needs. There are two reasons for this. The first is that you cannot possibly know another person's learning needs without their active help in the process. Secondly, even if you did know their needs, they would not accept your conclusions unless they had been fully involved in defining them. So, you must help the learner think it through because:

- You arrive at a more accurate assessment than you could any other way, and
- Learners will be committed to something they have worked out for themselves.

In other words, gaining the learner's commitment is the other side of the same coin as helping the learner to think it through. The two principles are one and the same.

The steps to a successful interview

The steps are:

- Create a suitable atmosphere
- Direct the conversation to objectives and aspirations
- Identify the skills, attitudes and knowledge the learner needs to fulfil those objectives and aspirations
- Summarise and agree.

Creating the atmosphere

The atmosphere in which the interview takes place is **crucial**. You cannot hold a useful discussion if either of you is under pressure, distracted or not able to concentrate fully on the discussion. The discussion must also take place **in an atmosphere of trust and in the absence of fear**.

We believe this means that you cannot link it to considerations of earnings in any way. Nor should it be linked to any form of recorded assessment. The learner must feel able to admit shortcomings in knowledge and skills without any fear that his or her promotion prospects, job security or earnings will be affected by this. The learning needs interview has to be a separate event - an event in which you as manager are prepared to support your junior colleague with no other end in view than to be helpful to them in their career.

To avoid the distractions and pressures that enter so much of working life, you must choose a location that will be free from interruptions. This may mean using a meeting room without telephones, or even leaving the workplace entirely for a short time. However, restaurants or pubs are not good alternatives because of the distracting effect of other people and of food and drink. Although these environments can be helpful in building rapport, the actual learning needs interview should have an element of formality and focus about it which you will not find in a social setting.

When we say that the learning needs interview should not be linked to a recorded assessment, we do not mean that learning needs should not be recorded. On the contrary, they must be. What we mean is that the actual meeting should not be recorded in the same way as an appraisal. The discussion should take place on the understanding that the learner can say anything he or she likes without it being taken down for the organisation's records. Once you and the learner have agreed on learning needs, it is sensible to record an agreed version of the outcome of the discussion. And, of course, as the manager, you may well wish to make notes for your own use as the discussion proceeds.

In order to be as helpful and supportive as possible, you should try to set aside your authority as much as you can and meet your junior colleague as an equal. This means you should avoid physical barriers as much as possible. Don't sit behind your desk, for example. Sit round a coffee table, or in a couple of easy chairs if you can. If your workplace is not designed for this, come round to the same side of your desk as your colleague and sit facing him or her without a physical barrier between you.

The way you start the meeting is important and will set the tone. Depending on how well you know your junior colleague, you may want to spend a few minutes relaxing and talking about general matters not connected with work.

Once you are through this ice-breaking stage, explain the purpose of the discussion. Explain that your role is to support your colleague as he or she considers their learning needs. Emphasise that the discussion will be confidential and nothing will be recorded in the organisational files without full agreement between both of you.

When you and your junior colleague are relaxed and ready, it is time to move on.

Direct the conversation to objectives and aspirations

The first thing you have to do, is to agree with your colleague what they are trying to achieve. A lot of interviews stall right here. It turns out that the manager and subordinate have different perceptions of the purpose of the job and no agreement is possible. If this happens to you, treat it as an opportunity, not a problem. You will have to address it before you can move forward, so you will probably need to defer further discussion on learning needs until you have clarified the learner's objectives. However, think how much worse things would be if you had not discovered the discrepancy in views!

The important thing is to make sure that your junior colleague agrees comfortably with you on what he or she is trying to achieve. If there is any doubt at all about what the objectives are, or any discomfort about whether they are the right objectives, you will not end up with a commitment to the learning needs that follow from them.

Identify the skills, attitudes and knowledge the learner needs

In the video, we see an example of how not to do this. Paul starts out by telling Robert what he is not good at.

This simply does not work. Your junior colleague may not agree with your assessment, and will not be committed to it, and you do not have the knowledge to be sure of his or her learning needs without involving them in the process.

The key skills you need are listening and questioning; and your role is to help the learner think through **their own needs**. Although you may be quite certain that you know what gaps need filling, unless the learner works this out on their own, they will not be committed.

Look at one objective or task at a time. Spend time discussing what it entails with your junior colleague. Then ask for their opinion as to what skills, attitudes and knowledge are needed to carry out the objective.

It is a good idea at this stage to separate out the skills, attitudes and knowledge required from any question of the learner's present level of attainment. Don't ask the learner what they need to learn or you may get the answer, "nothing". Rather, ask them what skills, attitudes and knowledge are needed to achieve the objective regardless of who is trying to achieve it. A possible question could be:

"Kim, if you were looking for someone to fulfill this task, what skills, attitudes and knowledge would you look for?"

You need to be able to agree with the learner what the **ideal skillset** would be before you can start to talk about the learner's **own level of attainment**.

It is also a good idea to use a form like the one Marguerite used with Isobel in the video. A single sheet of paper divided into columns headed **objective, skills, attitudes, knowledge** is all you need. Use one sheet per objective.

If you wish, you can use the form on page 39 of this guide. This is more comprehensive because it includes space for learning needs as well.

You will need to work with the learner to help them think it through. Be prepared to ask questions about the detail of the objective under discussion and keep probing to help the learner identify skills, attitudes and knowledge needed. You will probably find that the initial list is superficial and you will need to keep probing to get a more complete list. Your questioning technique is critical here. The Fenman programme, *Good Question* is ideal for developing this. The key idea is not to use closed questions such as, "Do you think you need project management skills for this?" all the time. Although you can use them occasionally for checking your understanding try to use more open questions such as, "What about the planning aspect? What skills would you look for there?"

Once you and the learner have agreed a list of skills, attitudes and knowledge that are needed to do the job, you will be ready to move on to discuss the learners needs. Discuss each aspect of the skillset you have identified and ask the learner's opinion as to their learning needs with regard to it.

You are likely to find that learners needs span a broad range of requirements. At one end of the range, you will find the learner who cannot see that they need any help in any area of skill, attitude or knowledge that you have jointly identified. At the other end, you will find the learner who feels they know nothing about anything and wants to learn more about everything you have discussed. Other learners will take up intermediate positions on the scale.

You will need to adapt your approach to fit the different learners.

The learner who presents a vast list of learning needs is the easier extreme to deal with. You can discuss their priorities. Explain that it is simply not possible to address every need immediately. Also, where you feel the learner is actually quite competent in an area, tell them so. Then ask the learner to identify no more than three learning needs that seem to be most critical to the attainment of the objective.

In this way you should be able to refine the list to a manageable size.

The learner who feels they already have all necessary skills, attitudes and knowledge is more of a problem. They may, of course, be right. In this case, you will probably be aware of this fact and only too happy to agree with them. However, in many cases you will have doubts about their conclusion.

If you find yourself in this position, it is important to be realistic about what you can achieve, and to understand clearly your role. Your role is to help the learner think things through. You cannot make them come to any particular conclusion. If they come to the conclusion that they have all the necessary skills, attitudes and knowledge, even if you do not agree, you have little choice but to accept their view. After all, the loser at the end of the day will be the learner whose career will not develop as much as it should. You have done your best to help them identify learning needs.

Nevertheless, you need to satisfy yourself that you have done everything possible to help the learner think things through. So, even if the learner does seem inclined to take the view that they know it all, take the time to go through each skill, attitude and piece of knowledge in turn, and keep asking questions about what the learner knows already. Most learners will discover that there is some aspect that they want to improve. However, if you find a learner who does not, you will just have to accept their conclusion at the end of the day.

Summarise and agree

Any discussion of learning needs must conclude with you both agreeing and recording what has been discussed. You must end up with a piece of paper which you are both happy with and which lists the learning needs of the learner.

The photocopiable Handouts 1 and 2 on pages 38 and 39 are adequate for this purpose.

One very good way to use such a form is to ask the learner to go away and fill it in with the conclusions you have both reached. You can then countersign the completed form and keep it as an agreed record. Alternatively, you can discuss with the learner any differences between what he or she has written down and what you thought you had agreed.

Another way is for you to write down what you believe was agreed and ask the learner for his or her comments on your recollections. You must decide which approach is better.

Generally, the more experienced and senior the learner, the more you will want to put the responsibility on them to summarise the meeting. Conversely, the more junior the learner, the more you will want to contribute your own thoughts.

However you do it, you must both end up with an agreed summary of learning needs with which you are both comfortable.

FOR PREVIEW ONLY

Section 7 National Vocational Qualifications and Scottish Vocational Qualifications

For readers outside Great Britain

In Great Britain, we have a system of National Vocational Qualifications - known as NVQ's or SVQ's for short. *The Learning Needs Interview* has been written bearing this system in mind. However, the content is not linked exclusively to this system. If you are overseas, you can ignore this section, other than for interest.

For readers in Scotland

We have used the abbreviation NVQ rather than the S/NVQ. We believe that what we say about NVQ's applies equally to their Scottish counterparts.

The awarding body for Training and Development NVQ 's

The Institute of Personnel and Development is the awarding body for NVQ's in Training and Development. You should contact the Institute of Personnel and Development directly for their publications on acquiring NVQ's. Their address is: *Institute of Training and Development, Awarding Body, IPD House, Camp Road, Wimbledon, London SW19 4UX*. This is the only way to get authoritative and up to date information on their National Vocational Qualifications. The information in this booklet is for guidance only. It is not authorised by the IPD. Fenman believes it is accurate and correct, but you must not rely on it when planning your qualification.

The learning needs interview and NVQ's

An NVQ in Training and Development is made up of a number of units, and each unit is made up of a number of elements. If you obtain the requisite number of units, you will qualify for an NVQ in Training and Development. However, you do not need to complete an NVQ to get value from the system. Certificates are awarded for individual units.

Furthermore, we are seeing the growth of 'unitisation' in qualifications. This means that people are putting together personal portfolios of qualifications consisting of units from several different NVQ's. For example, you may wish to have several units from the MCI (the awarding body for Management Qualifications) and one or two specialist units from NVQ's such as Training and Development.

Although ‘unitisation’ was not the primary aim of the system when it was conceived, it is turning out to be one of its great strengths.

NVQ’s are awarded on the basis of evidence of competence. It does not matter how much you know about a subject. To get an NVQ, or part of an NVQ, you must show that you can actually do the task in question to a set standard. So mere study of a programme such as *The Learning Needs Interview* cannot move you towards a qualification. What it can do is help you acquire the knowledge that you need in order to perform competently.

The knowledge and skills addressed in *The Learning Needs Interview* are particularly relevant to Unit A21. This Unit is entitled, Identify individual’s learning aims, needs and styles. This unit is divided into two elements - A211 and A212. The first one deals with collecting information from individuals and the second one deals with using that information to arrive at conclusions about the individual’s needs. There is considerable overlap with unit A13, which deals with identifying organisational training and development needs. One way of doing this is to interview people within the organisation using the framework of *The Learning Needs Interview*. To simplify things, the phrase ‘the unit’ from now on means unit A21.

The unit requires you to show competence in identifying “learning aims, objectives, needs, learning styles, personal aspirations”. It also requires you to demonstrate competence in “interview, questioning, assessments” using “records, reports, assessments, discussions”.

The Learning Needs Interview only deals with the discussion and interview methods of obtaining information. In practice, these are by far the most important. To show competence, you will need to be able to use other sources of information as well. We have also, quite deliberately, left out of the programme any consideration of learning styles. Remember that Marguerite in the video makes the point that you need to separate the process into two meetings - one to identify learning needs and another to put together a learning plan. In our view, learning styles need to be taken into account in putting together a learning plan but are not necessary to an analysis of learning needs.

The Learning Needs Interview makes a major contribution to the knowledge and skills required to obtain Unit A21. In particular, it deals with:

Interviewing and questioning techniques

How to sequence and pace information and gauge appropriateness of language for individual learners

How to put learners at ease.

all of which are specifically required by Unit A21.

In addition:

Interviewing and questioning technique

How to give constructive feedback

are dealt with in more detail in the Fenman programmes *Good Question* and *Feedback Techniques*.

Photocopiable Handout 1

Person Concerned _____

Business Objective	Skills/Attitude/Knowledge Required	Learning Needs

Signed	Director
Date	Date

Photocopiable Handout 2

Main area of job/objectives

Attitudes

Skills

Knowledge

FOR PREVIEW ONLY