

# Chapter Nine

## Moving Forward

The information presented in the first eight chapters of this guide is very extensive. A number of subjects have been covered from adult learning theory and the Experiential Learning Cycle, to funding, working with trainers and evaluation of training activities. The task of putting all this information together and applying it to your work situation may appear daunting. It often helps to analyse the current state of your training programme before planning ahead. It is then possible to develop a vision for the future, and a work plan for addressing the most critical and challenging issues.

Making a decision without established guidelines is like embarking on a long journey without a map and saying 'it doesn't matter which way I go.' You will obviously end up somewhere, but without a plan, you may not reach your goals and you risk wasting time and valuable resources. This chapter describes how to create a unit level plan to develop the role of training within your organisation. On the following pages a framework is provided which shows progressive phases through which most organisations move in developing the role of training. This framework should assist you in putting your current situation and your vision for the future into context. The chapter is primarily designed for training officers but it may also be useful for managers and heads of organisations.

Although the responsibility for raising performance within your organisation is a formidable challenge, it is important to remember that you are not alone! Institutionalisation of training requires commitment and support from many stakeholders, beginning with those at the top. You may seek guidance through planned, participatory discussions of the training unit's needs, priorities and resources in order to develop the role of training within your organisation. This chapter includes information on how to be an effective advocate for training to help you involve senior level stakeholders.

### Strategic Planning

Strategic planning is a phrase that every one seems to be using these days. What does it mean? Strategic planning at the organisational level involves a series of steps which allow a structured analysis and creative thinking. The key steps are:

- ❶ To develop a mission statement.
- ❷ To undertake an analysis of strengths, weaknesses, opportunities and threats (SWOT).
- ❸ To prioritize your SWOT analysis, to define the key/critical issues and to generate options.
- ❹ To develop strategic actions.
- ❺ To develop a strategy for implementation.

### OBJECTIVES

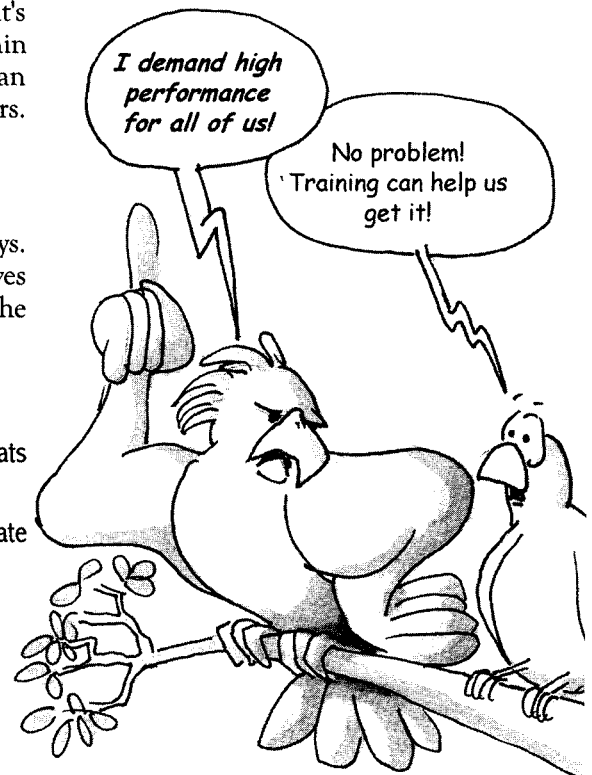
THIS CHAPTER WILL ASSIST YOU TO

Assess the status of training in the organisation.

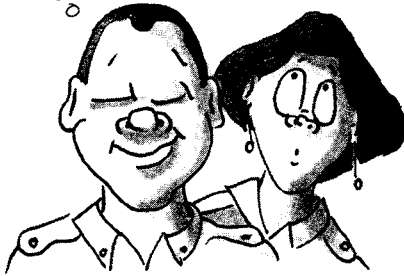
Identify critical issues for the training unit.

Envision the future of training in the organisation.

Develop a work plan to advance training towards its mission in the organisation.



**HIGH PERFORMANCE**



Start with an idea of where you want to go as a unit and keep sight of your mission, goals and objectives.

We will need to give our colleagues good knowledge, skills and attitudes to improve their performance



Remember that training has a primary role in the achievement of organisational goals and objectives.

**Our Unit's Mission**



Remember that the task will be easier if you can develop a strong mission or goal which you can all agree upon.

These steps lead your organisation to develop a strategy for achieving its objectives. Ideally your organisation will have developed a strategic plan and in doing this will have identified training as integral to achieving its objectives. As we don't live in an ideal world it may be that your organisation doesn't have a plan and you have the challenging task of showing your senior managers that training is not just an activity in and of itself, but that it needs to be a key mechanism for achieving objectives. The approach you could take is to make an assessment of the current state of your training programme and do some strategic planning at your own department or unit level. You can then use this as a basis for discussions with senior managers and show the advantages of adopting strategic planning. This chapter takes this approach.

### Strategic Thinking at the Unit Level

The first step in developing a vision for the role of training in your organisation is to take a strategic approach. Analyse the present, envision the future, and develop a plan to address critical issues. Act strategically to:

- 1 Identify critical issues that the training unit needs to address in order to develop the role of training in the organisation.
- 2 Develop a mission statement that articulates the purpose of the training unit.
- 3 Create a work plan to guide the training unit into the future.

In addition to the basic outputs listed above, your strategic planning process should yield some other important outcomes including:

- ✓ an improved understanding of how training officers can help organisations be more effective
- ✓ a more defined role for the training unit and the Training Officer in the organisation
- ✓ better communication within the training unit and with other stakeholders

**Getting Started on Planning.** Strategic planning can only take place once the Training Officer and other stakeholders agree on the current status of training. Discussion and analysis with people from both within and outside of the organisation are required to achieve this step.

You need to be clear about the goal of your organisation to set the context of your discussions and analysis. Although your organisation may not have a 'mission statement' there will be statutes which explain what the organisation was set up to do. Use these as a starting point and make sure all stakeholders are familiar with them.

For a thorough analysis of your unit's present status, consider information from a wide variety of sources. Be open to the opinions of others (whether or not you share their point of view). Greater awareness leads to being more responsive and cost-effective. Try questionnaires or SWOT analysis to involve stakeholders and get the information you need.

Stakeholders are people who are significantly influenced by or have an influence on the implementation of a strategy or project. Stakeholders may include representatives of government agencies, collaborating institutions, donors, community leaders and members, volunteers, clients, and the organisation's governing body and staff.

**Information Gathering.** To get information from stakeholders, you can distribute written questionnaires, conduct individual interviews, or have group discussions (focus group interviews). The objective should be to get opinions of others regarding the training unit's strengths and weaknesses, not to convince them that one form of training or another is necessary.

SWOT. Another way of learning from stakeholders is to invite them to participate in a SWOT Analysis. SWOT is an abbreviation for Strengths, Weaknesses, Opportunities, and Threats. A SWOT analysis is an in-depth, focused, and frank group discussion involving stakeholders (including staff members). Some people consider it a kind of brainstorming exercise, where everyone's ideas are open to consideration. The SWOT analysis should provide information about the training unit, according to the following grid:

SWOT	INTERNAL Within the training unit	EXTERNAL Outside the training unit
<b>Positive Characteristics</b>	<b>Strengths</b> Things that work well within the training unit	<b>Opportunities</b> Areas where there is potential for growth.
<b>Negative Characteristics</b>	<b>Weakness</b> Things that do not work well within the training unit	<b>Threats</b> External factors which threaten the training unit's effectiveness.

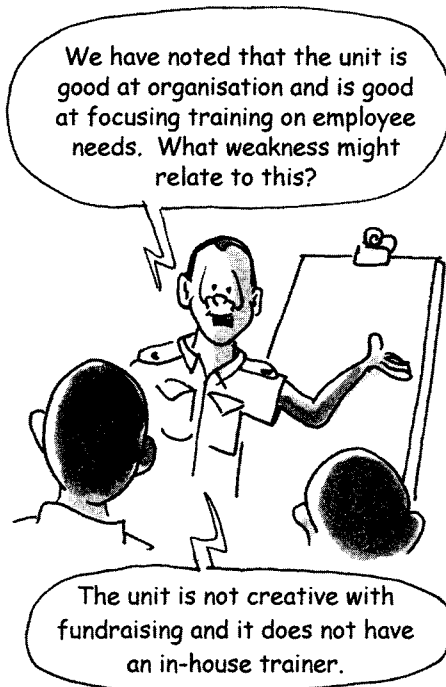
It is important to establish where you stand before moving forward.



To get an accurate picture of your current status, involve key stakeholders in the information gathering stage.



SWOT involves brainstorming. The facilitator should act as a guide and resist unduly influencing the discussions.



Threats include issues which have a negative impact but may be beyond the control of the participants.



**When conducting SWOT analysis, facilitators ask questions of the participants, discuss and record their answers. Questions may include:**

**To identify Strengths, enquire:**

- ❶ How does the training unit assist the organisation ?
- ❷ What does the unit do well?
- ❸ What aspects of the training unit make it strong?
- ❹ What problems has the training unit been able to resolve effectively?

**To identify Weaknesses, ask:**

- ❶ What aspects of the training unit are inefficient?
- ❷ What would you like to change about the training unit?
- ❸ What are some recurrent problems within the unit?

**To identify Opportunities, ask:**

- ❶ What outside factors may help the unit to become more effective?

**To identify Threats, ask:**

- ❶ What's happening outside the training unit that has a negative influence on the unit and the organisation?

**To assess opportunities and threats, consider these issues:**

- ✓ the need for training within the organisation to achieve objectives
- ✓ the demand for training within the organisation
- ✓ recognition of training's function in the organisation
- ✓ others' perceptions of the training unit
- ✓ leadership in the organisation
- ✓ organisational funding
- ✓ the extent to which the organisation allocates funding to training activities
- ✓ ability of the organisation to recruit/assign enough competent staff to the training unit
- ✓ the training unit's access to information and materials to become more effective
- ✓ other organisations and/or consultants that can help the training units capacity
- ✓ donor interest in training activities
- ✓ training opportunities at the local, national, and international levels
- ✓ changes in available technology

Discussion of these issues will bring out other considerations which should be included in the SWOT analysis. By the end of the analysis, the training unit should have a list of all strengths, weaknesses, opportunities and threats relevant to the unit's effectiveness. This will become the basis for identifying critical issues for the training unit.

A basic SWOT analysis can be done in half a day while a more thorough SWOT analysis could take an entire day of a workshop or retreat. The Training Officer shouldn't be discouraged if the SWOT analysis sounds too complicated ~ he or she should make it a simple process of analysis. The overriding objective is to bring stakeholders together to review the current training situation.

**EXAMPLE: SWOT ANALYSIS RESULTS-** *The Mpumalanga Parks Board Staff Development Unit, South Africa*

**Strengths identified**

- Motivated staff of the staff development division who are prepared to undergo hardship in the field to upgrade field personnel
- Flexibility in scheduling courses
- Staff members eager to learn and improve their skills
- Staff development is an essential part of the capacity building and empowerment of staff in the organisation

**Weaknesses identified**

- High costs of staff development
- Lack of administrative support to maintain staff development records
- Lack of promotional opportunities for staff of the staff development division
- Lack of expertise in human resource management

**Opportunities identified**

- A booming demand for staff development (nationally and internationally) that could generate income to subsidise own staff development costs
- Potential exists to become the leading nature conservation organisation in southern Africa in the field of conservation-related staff development
- Potential exists to produce highly committed, motivated, skilled staff members in nature conservation in Mpumalanga
- Potential exists to contribute significantly to upgrading the ability of staff, in nature conservation and related industries, to protect endangered species and other fauna and flora in protected areas.

**Threats identified**

- Costs of staff development will increase in future
- Lack of support by senior management for the objectives of the staff development plan
- Negative perception of in-service staff development as being inferior
- Lack of feedback regarding staff performance by management and supervisors
- Lack of ownership and support by staff of the staff development plan

It's a good idea to record the information in Strength, Weakness, Opportunity and Threat categories across a wall. This makes it easier for the facilitator to guide the group in linking issues and drawing conclusions.

The facilitator should be familiar with the issues and skilled at participatory techniques. He or she should check with the group to make sure that the points being recorded are correct.

The SWOT should highlight critical issues for the unit to address. At the end of the exercise, participants should have a clear picture of the status of the unit and ideas for improvement.

