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Needs Assessment for E-Learning

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Needs Assessment for E-Learning

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Needs Assessment

Many training and development professionals receive negative responses from clients and managers upon hearing the term "needs assessment." Other terms (such as "organizational diagnosis" or "determining goals") are not met with such negativity. But in the end, all we really mean is maybe-we-should-step-back-and-see-what's-really-going-on-here-before-we-implement-the-solution.

It would be a mistake to assume this backlash is merely a jargon battle. Traditional needs assessment, or a process for determining the gap between what target learners currently know and what they need to know, may result in the creation of excellent training. But in today's dynamic workplace and given the proliferation of new high-tech education tools ("e-learning"), focusing exclusively on creating excellent training is missing the mark.

For a needs assessment to have a successful outcome, it must accomplish many things—improving performance being only one. It must also accomplish the following:

- determine how to achieve the high-level goals of the organization (for example, increasing sales and fostering innovation)
- determine what system obstacles you need to remove (other than training)
- point to an intervention that will balance the conflicting needs of different stakeholders (information technology [IT] department vs. human resources [HR] department, participants vs. managers, budget vs. vendor costs, and so on)
- pave the way for the new program

The purpose of this *Info-line* is to guide practitioners through an expanded needs assessment process that better serves organizations implementing e-learning programs. Readers should already be well-versed in the fundamental techniques of needs assessment (for example, questionnaires, interviewing, creating objectives, and so on) or are obtaining that basic competency through other sources (see the references at the back of this issue).

After reading this *Info-line*, you should be able to create a high-level requirements document that includes the following:

- objectives (macro organizational objectives and micro target learner population objectives)
- a list of advantages and potential obstacles to e-learning adoption
- a list of possible e-learning configurations
- an e-learning readiness score

Administrative Details

Trying to define e-learning is a little like trying to define love. Making matters more complex is that there are about as many possible e-learning configurations as there are romantic partnerships. Due to space constraints and format restrictions, this document presents a detailed introduction to the e-learning needs assessment process, not a comprehensive treatment of all possible situations. Understanding the following parameters will prevent confusion or misunderstandings.

Parameters

The phrase "e-learning initiative" or "program" refers to a blend of traditional classroom training and content that is delivered electronically. Organizations are using a significant number of e-learning programs to increase revenue, and this often involves providing e-learning to partners, customers, or another external audience. In this document, we assume you will be designing an e-learning initiative for an internal audience in a typical medium to large (50+ people) organization.

Holistic System

When people refer to an e-learning solution or program, they are actually conceptualizing a system comprised of many diverse factors. Think of the system as a tree growing in the wild.

- The learners are the leaves of the tree—the conduits through which all change takes place. Input (information) is converted to output (productivity) through learners just as leaves transform sunlight, water, and nutrients into nutritious food through photosynthesis.
- The stakeholders are the tree trunk. People directly affect learners by positioning them (in an ideal world) in the right place for the transformation to occur. These people can include the participant's managers, the division director, information technology professionals, human resources representatives, unions, fellow employees who are not participants, and gatekeepers (such as secretaries and assistants).
- Basic building blocks of the program—such as budget, human resources, time, curriculum, public relations, and procedures—are the foundation of the program. Just as roots and soil provide ongoing stability and nutrients to the tree, these necessities provide the infrastructure and raw materials needed by the learners.
- The environment surrounding the tree does not radically alter the process, but rather, influences it more subtly over time. These include factors such as the legal, political, economic, and cultural climate; the marketplace; and simple fate. Just as the location of the sun, the humidity, and the air quality (that is, pollution and ozone depletion) all subtly affect the growth of the tree, so these factors affect the learner's ability to transform the e-learning into productivity gains.
- No one element is more important than another. A needs assessment for e-learning differs from a needs assessment for the classroom *not* because these factors are absent in a traditional program. But rather because the importance of each factor is heightened when you implement e-learning.

Step 1: Determine Macro Objectives

Begin by determining the macro-level objectives of your organization. This is a two-pronged approach. First find responses to these questions:

- What would the CEO and other senior-level executives like to accomplish in the next six months? Year? Eighteen months? Three years?
- Equally important but often more difficult to ascertain is this question: "Where is the organization feeling the most pain?"

Next, write specific, measurable, achievable, realistic, and timely (SMART) macro-level objectives that clearly and convincingly address the major points of each response.

Step 2: Assess TPP

The next step in the process is time-consuming but indispensable: Assess the target participant population (TPP) to set micro-level objectives. While this *Info-line* does not cover needs assessment fundamentals (such as when to use a focus group, how to do an extant data analysis, and so on), it does focus on aspects of the learner population that intersect with the technical elements of the program. It is assumed you will perform an assessment specifically designed to addresses the nontechnical elements of the subject matter needs in tandem with the process described below.

Assessing learners involves looking at three factors from the e-learning readiness model: psychological, technical skill, and equipment readiness.

Psychological Readiness

For learners, assess those aspects that are predominantly "internal" (within the learner) such as self-esteem, preferred learning style, cultural expectations, comfort with change and attitudes towards education, learning, technology, his or her employer, past educational or learning experiences, and perceived cost/benefit ratio.

You do not need to be a brain surgeon to know that what goes on inside the learner's head will be a strong determinant of the outcome of your efforts.

For an e-learning initiative to accomplish the designer's macro-level objectives, you must assess carefully the psychological factors that are most likely to impact the program.

In addition to the steps you take to assess the TPP's psychological readiness for training, some of the steps to determine their readiness for e-learning include the following:

- Perform a learning styles assessment that is specifically geared to e-learning and technical learning.
- Evaluate learners' attitude towards technology. Determine where learners fall on the technology adoption curve by inquiring about their technical habits.
- Assess learners' technical goals as they relate to their employment. Determine how the TPP feels about technology and their jobs. For example, do they feel there is a connection between learning new technologies and achieving their professional goals?
- Review the TPP's previous experience with e-learning. Determine whether they have taken any form of distance learning class, "attended" satellite broadcast lectures, and so on.

Technical Skills Readiness

For learners, take into consideration those technical competencies that will facilitate or hinder their ability to benefit from an e-learning program. This includes basic computer skills, motor skills (for example, typing), research and information discovery skills, project management skills, and familiarity with computer-related terminology.

If you have ever had a projector die in the middle of a presentation or lost an online connection during a trade show demonstration, you know the message is meaningless if the tools get in the way. Assessing the TPP's ability to use the tools can be a challenging process because the technology—as it will look when it is implemented—may not yet exist. It is almost impossible to determine if a learner can use a system that does not exist; it is equally difficult to write a needs assessment guide to cover all possible skills necessary to operate all the technical equipment out there.

With that said, assessing basic skills can serve as a guide to the e-learning designer who is creating objectives and avoiding barriers or obstacles. Some of the many steps to determining technical readiness include the following:

Examine the TPP's current aptitude with the technology they already have (both hardware and software). For example, do they use online services simply for email or for complex tasks such as maintaining their own Web sites? Do they have mobile phones? If so, are they programmed with phone numbers? Do they do text messaging?

Consider the TPP's motor skills. Determine the motor characteristics of your TPP that might help or hinder their use of technology. For example, can they type? Are there any physical characteristics that might prevent the use of a keyboard and screen (for example, do they, for any reason, have trouble reading the computer screen?)

Assess the TPP's technical history. Determine how long the TPP has been using technology and how comfortable they are using it. For example, did they grow up surrounded by technology? How long have they been using a personal computer (PC)?

Equipment Readiness

In this phase of the assessment, as difficult as this will be, it is best to stick to figuring out whether your TPP (not the IT department, not the vendor) has the proper equipment to take advantage of an e-learning initiative. Look to discover basic equipment information (such as processor power, online access speeds, monitor size, plug-ins, access devices, and so on). When addressing this factor in the next step, you will discuss the back-end equipment from the supply side of the equation. Here, only look at the equipment that will directly touch the learner.

It is important to make the distinction between "necessary" equipment and "proper" equipment. Sure, a commuter plane can take a passenger from New York to California, but naïve is the modern airline that expects repeat passengers from that voyage. While a person using a 566 Pentium with DSL can theoretically participate in a Web videoconference, who wants to watch a face that looks funny, freezes every few seconds, and never matches the audio?

It is unlikely you will be able to pin down exactly what equipment learners need at this point, but you will eventually need to have this information. For now, it should be enough to assess the general state of their equipment by looking at the following:

- Determine if and where they have access to a PC, the speed and configuration of the computer, and what peripherals are attached.
- Consider access to other personal equipment that might be applicable to e-learning. Do they have personal electronic devices (owned either personally or by their employer) that they can use for e-learning such as PDAs, digital TVs, VCRs, and CD players?
- Determine whether the TPP has access to online services at work and at home. If yes, what is the speed of those connections and what is the planned access to faster connections?

Sculpt Micro-Level Objectives

At this point, you should have completed an assessment that examines both the subject matter needs of your TPP and the e-learning needs. Take this information and transform it into action by creating micro-level objectives.

Start by getting out your sheet of macro-level objectives. Read through your notes and see what patterns emerge. If possible, ask another person to review your notes at the same time and then discuss what patterns you each see. Without thinking too hard, quickly write down as many two- or four-word "objectives" as you can. Make a goal of getting at least 25 mini-objectives written in one minute. A few of your objectives may resemble the following:

- type 40 wpm
- troubleshoot customer problems
- attain faster computers
- increase comfort level with technology
- express the connection between technology and career advancement

Notice that you want objectives that are both related and unrelated to the subject matter.

Working from the patterns you discovered and the objectives you created, determine responses to the following questions:

- What actions are most likely to help you quickly reach your macro-level goals?
- What issues are most likely to hamper your ability to attain those goals?
- What actions will facilitate adoption of a technology-based program?
- What actions will delay the adoption of a technology-based program?

The final step is to write the objective in SMART format. Remember, at this point you are only able to write micro-level objectives that directly relate to your TPP. After completing the next section, you will have a complete set of objectives that you can use with stakeholders and the TPP.

Step 3: Assess System Factors

Learners are only one of the many factors you should consider if an e-learning program is to be successful. In this step, apply the e-learning readiness model to the other system factors.

Trying to comprehensively assess an entire system only leads to analysis paralysis. Instead, your goal must be to capture the following:

1. The top one or two goals and objectives of the most critical stakeholders in the system.
2. The potential obstacles that could sabotage or decrease the effectiveness of the e-learning initiative.

First identify (by name, position, and title) the most influential stakeholders. Then examine each stakeholder through the filter of the e-learning prep factors discussed in the *E-Learning Readiness Model* sidebar.

Stakeholders

The next step is to apply the e-learning readiness model to each of the stakeholders. Ideally, you should assess everyone who received a score above seven (refer to *Determining Stakeholders* sidebar for the scale). If you can assess more, your program is more likely to be a success. The lowest common denominator when creating an e-learning program similar to the one described in the introduction should include at least one member of each of the following groups:

- subject matter experts (SMEs)
- IT or IS department
- potential vendors
- TPP managers
- nonparticipating co-workers

Remember that your goal in assessing these stakeholders is not to conduct a deep and comprehensive assessment of every possible facet of their existence. Your goal is to determine the top two or three ways an e-learning program benefits them and in what ways they may potentially hinder your efforts (unintentionally and intentionally).

Given the enormity of this task, the high risk of overassessing, and the tremendous likelihood that your client wanted the program done yesterday, continually ask yourself the following questions for each stakeholder when assessing the different readiness factors.

1. How will they benefit, both directly and indirectly, from an education or training program that relies heavily upon technology? It is not enough to determine how they will benefit from an education program. Chances are your e-learning initiative is going to demand something of them that the classroom program did not. Another, more proactive way to ask this question: What can you do to make sure stakeholders benefit from the use of technology in training?

2. How will he or she be directly affected by the e-learning initiative? Determine what *burden* will be added to his or her life that would not exist without the e-learning initiative. What *benefit* would not exist?

E-Learning Readiness Model

Design your e-learning needs assessment to answer three questions:

1. Can we do this?

2. If we can do this, how are we going to do it?

3. What are the outcomes and how do we measure them?

The e-learning readiness model simplifies the process of getting the basic information necessary to answer these questions. Grouping a wide variety of factors into the following eight categories allows the practitioner to use the same process to assess vastly different stakeholders in the system.

Psychological Readiness: The individual's state of mind as it impacts the outcome of the e-learning initiative.

Sociological Readiness: The interpersonal aspects of the environment in which you will implement the program.

Technological Skill Readiness: The observable and measurable technical competencies.

Equipment Readiness: The question of the proper equipment possession.

Content Readiness: The subject matter and goals of the instruction.

Financial Readiness: The budget size and allocation process.

Human Resource Readiness: The availability and design of the human support system.

Environmental Readiness: The large scale forces operating on the stakeholders both within the organization and outside the organization.

For each stakeholder group, the combination of factors that you examine is different. This model, however, provides a simplified way of determining whether e-learning can be implemented successfully—and if so, what forces are on your side. If not, it helps determine what obstacles you need to address.

Determining Stakeholders

Create a stakeholder identification worksheet similar to the one below (but with at least 20 rows) in your word processing or spreadsheet program. Look at all the different elements of the e-learning holistic system (refer to the *Holistic System* sidebar if you need help remembering the elements). For each element, brainstorm all the possible people who might be involved in facilitating or impeding your e-learning program. Write his or her name in the name column of the worksheet. It is far better to go overboard and have too many names than to miss key individuals—later on you can create a short list. By the end of this process, you should have identified at least 20 stakeholders.

Name	Title	Function/Divison	Influence Score (1-10)	Notes

Use the following list to help you identify stakeholders.

- Potential technology stakeholders: CIO, VP information technology (IT) or information systems (IS), IS/IT director, IT manager, IT help desk manager
- Potential participant-influencing stakeholders: nonparticipating co-workers, managers, directors
- Potential finance stakeholders: CFO, investment bankers, venture capitalists, stockholders
- Potential human resources (HR) stakeholders: VP HR, division HR liaison, OD director, training professionals
- Potential sales stakeholders: VP sales, sales director
- Potential customer service stakeholders
- Potential marketing stakeholders
- Potential government stakeholders (If your organization is a part of a governmental program—for example, welfare to work and incubator—determine who the key political contacts will be.)
- Potential union stakeholders
- Potential legal stakeholders (Lawyers for other firms if a partnership or acquisition is involved, your own lawyers if a new business model is being built around the e-learning initiative.)
- Potential vendor stakeholders (If you have a partnership with a vendor, determine who the stakeholders are for that group.)
- Potential general public stakeholders (There may be people who indirectly influence the e-learning process by directly influencing learners: spouses, children, family, religious groups, and so on.)

For each name, fill in the title and function columns. Only after identifying name, title, and function, should you fill in the potential influence column. For each person ask yourself questions similar to the following:

- If she set her mind to it, how likely would she be to impact the e-learning program?
- How likely is it that she will set her mind to it?

Based upon your analysis, assign the person an influence score between 1 and 10 where 1 is "not at all" and 10 is "greatly." It should be virtually impossible for a person who receives a 1 to impact your program in any way. A person who receives a 10 should have to do very little to impact it greatly.

Cut and paste names on your worksheet until they are in order from *most influential* (anyone who scored a 7-10), *possibly influential* (4-6) and *unlikely to influence* (1-3). Ask yourself if the ones at the top are most likely to directly influence your program, while the ones in the middle are most likely to indirectly influence your program. Rearrange the list according to your response.

3. What are possible ways the stakeholder could (intentionally or unintentionally) hinder progress of the e-learning initiative? Another way of getting at this information is to use the e-learning readiness model and go through the relevant factors (psychological, environmental, financial, and so forth) to determine what issues might prevent each stakeholder's enthusiastic and wholehearted support.

4. How can you bring the involved stakeholder into the process in such a way that he or she will become an advocate?

While it is critical for you to assess psychological factors for each system stakeholder, we are not covering such factors here because the aspects you need to assess are similar for both the TPP and all the other system elements. The following sections discuss how to determine the scope of your e-learning readiness.

Review each of the factors, choosing one or two stakeholders to assess for each one. The first factor to assess is content, as this will guide the parameters of all the other factors.

Content Readiness

If you have time to assess only one factor, aside from the learners, it should be content. As important as the other elements are, a program that does not prepare the content properly will have little chance of succeeding. This is due in part to two significant differences between content delivered in a classroom by an instructor and content delivered electronically:

■ ***Preparation***
Early and thorough preparation is more critical when developing content for electronic delivery. When an instructor delivers content, he or she can adjust it based upon his or her ability to improvise and read the audience. The instructor acts as part of the preparation process. When you deliver content electronically, however, you have significantly fewer opportunities to make modifications or adjustments based upon real-time information.

■ ***Tolerance***
A significantly lower tolerance level exists for content delivered electronically. If an instructor is presenting a four-hour module in the classroom, participants are more likely to sit through the entire presentation than if the content is delivered over the Web. Competition for the participant's attention is simply greater when he or she is in front of a computer.

These differences point to the significant relationship between carefully assessing content needs and achieving business results. Before providing suggestions to guide your process, it is important to note that there are no hard and fast rules to assessing content. There will always be exceptions when you need to break the rules. Use the suggestions below as guidelines, not rigid criteria.

You can assess content readiness by asking a series of questions:

1. Does the subject matter currently exist in a tangible format? If not, you need to go through the identification process to develop objectives. If it already exists, you need to assess its portability to an e-learning format.

2. If the content already exists, is there any content that someone has already chunked into small modules? If the content does not exist, do any elements of the subject matter fall naturally into smaller chunks? If the answer to either of these is *yes*, your content is suitable for e-learning.

3. Does content already exist to fill a business need of certification or credentialing? In other words, does content exist where individual accountability and tracking are particularly critical? If so, can you map this method onto an e-learning system? If not, is there a business need that credentialing or progress tracking can fill?

4. Is there content or subject matter that is customized to the individual learner? Or, is there subject matter that would achieve better business objectives if it were tailored to the individual learner? In many cases, e-learning delivery methods can better accommodate an individual learner's needs than classroom training—if you consider expense and downtime.

Content Mistakes to Avoid

Do not consider content that already exists and has been converted to HTML or another electronic format as "e-learning." Content that you convert to an electronic format is no more e-learning than glass transformed into cubic zirconia is a diamond. You must evaluate content on several criteria to determine how "e-learning ready" it is.

Do not use existing content instead of creating new content because you think it will be easier, more efficient, or decrease development time. In many cases, content has been designed to suit the classroom, just as a commuter plane was designed for short journeys. Trying to retrofit the content to suit e-learning can be like putting an after burner and black paint on a plane and trying to pass it off as a stealth bomber. Often, it is more profitable (from an economic and a quality standpoint) to develop new content.

Do not use the same criteria to measure success in e-learning as you do for classroom training. Metrics such as completion rates or smile sheets do not accurately reflect whether classroom instruction has been successful. When used in an e-learning program, it is not only inaccurate—it can also be misleading.

First, participants can achieve business results without even knowing they are participating in e-learning. For example, if you use an online help system to figure out a software feature or listen to a Webcast of a public radio education program, you may not even be aware you are in the throes of an e-learning experience. Asking people to rate an experience that they have fit seamlessly into their daily existence is, in and of itself, a more significant measure of their satisfaction than an opinion provided on a survey.

Secondly, the point of e-learning is to give participants the freedom to determine what they need to learn and how. If an instructional designer develops a module that has more content than the user needs to learn, you cannot judge the success of the program by whether or not the user completes the entire module.

5. Are there only a few SMEs who can effectively teach the content? Creating a blended e-learning solution will solve three business needs:

- free up the SMEs' time to focus on other endeavors
- codify knowledge that might not currently be in a tangible format
- reach a wider audience

In addition to assessing what content is "e-learning ready" or what you can do to become e-learning ready, an assessment must determine which e-learning delivery method will achieve business results most efficiently. A question frequently asked is, Which types of subject matter naturally lend themselves better to e-learning than classroom instruction?

Any solid e-learning program is a blend—a mixture of classroom training and e-learning. You can determine which type of subject matter is right for which delivery method more by the features of the technology and the skills of the participants or facilitator than the actual topic covered. A dynamic speaker leading a Webcast focusing on presentation skills, coupled with a classroom opportunity to practice, will be more effective than a dull teacher presenting the same content. With that said, there are other parameters that make content more or less suited to e-learning delivery. Following are some to consider.

On one side of the e-learning delivery spectrum are the more static, self-supporting methods such as computer-based training (CBT):

- Does content or subject matter already exist that is well suited to a linear method of delivery? If so, consider a self-supporting, stand-alone delivery method such as a tutorial or CBT type of system.
- Does content or subject matter exist that is engaging as a book is engaging? Specifically, does the excitement and appeal exist within a self-contained, completely static format? This is another occasion when a self-supporting, stand-alone delivery method is appropriate.

- Is there content that you must teach with a high degree of consistency for legal or other regulatory reasons? If so, an e-learning delivery mechanism that is static and linear may be the right solution.

On the other side of the spectrum are the delivery methods that are dynamic, less consistent, and involve the ongoing participation of several people. Examples include Webcasts and satellite delivery:

- Does the subject matter change frequently? Is it so dynamic that by the time you build a self-supporting e-learning solution around the subject matter it will be obsolete? If so, consider a more dynamic, easy-to-alter, e-learning solution (such as an online support system or knowledge-base).

- Is the content filled with personality, or is there an instructor who is particularly dynamic and engaging? Consider using a live presentation that you can capture and play back asynchronously at a later date (for example, a virtual classroom or Webcast).

- Does the content have what it takes to hold an audience's attention for a significant time (that is, 20 minutes)? This question refers to content that in and of itself is of particular interest to an audience—meaning that even if the presenter were dull, it would still hold their attention. If so, you can use a method that is less interactive than Webcasts. For example, you can use an asynchronous course development tool.

- Does the content require group involvement? If so, use a method that encourages interaction between participants within the same physical space. For example, Webcasts and live satellite broadcasts, as well as community spaces, allow for group involvement in a way that more static self-contained modules do not.

Environmental Readiness

Environment: the general atmosphere in which the e-learning program will exist. The environment exists on many levels—there is the environment within the department, within the organization, within the immediate physical surroundings (that is, the office complex), within the city/province/township, within the state/county, within the country, and so on.

Trying to assess each element of each environment is impractical and not helpful. It is important, however, to determine which factors operating on which level of the environment will play an important role in your project—both positively and potentially negatively. The following are some of the environmental factors to consider:

■ ***Employee-Related Law and Rights***
For example, are there parameters around when learning can be done, how to accommodate special needs employees, when and how you can perform assessments, and how to maintain equal opportunities for all workers?

■ ***Job Market***
A strong job market (more competition for the same talent pool) means your e-learning program can be an incentive to help attract and retain top talent. But it can also spell the need to hire and train less experienced candidates. A weak job market (more competition for the same jobs) will provide more leeway both in terms of content and functionality for the e-learning program.

■ ***Political Environment***
This can range from programs that may facilitate development of the program (for example, some governments provide subsidies, grants, or tax breaks to corporations that provide training) to "hot potato" issues that are in the political limelight.

■ ***Third-Party Coalitions***
An environment in which there are strong united and established groups surrounding the e-learning program means more careful scrutiny and heightens the importance of quality assurance. For example, if you were instigating an e-learning system for the city of Berkeley (a city with a history of highly vocal and organized public movements), you would assess different needs than if you were developing the system for a department within a small private company.

Sociological Readiness

While sociological readiness could fit under the environmental category, it is separated here because it focuses exclusively on interpersonal behavior. Many interpersonal phenomena can influence the outcome of your initiative: power, control, peer pressure, conformity, group-think, and synergy. Gauge which interpersonal dimensions are most likely to influence your initiative (either positively or negatively) by "reading" interpersonal signals between key stakeholders.

It is not so much that e-learning is not right for groups that have a certain sociological profile; it is more that the kind of e-learning will be largely determined by it. Below are just a few ways to gain insight into the interpersonal dimensions operating in an organization.

■ ***Visible Icons and Symbols***
For an excellent view into the culture, pay close attention to the interpersonal cues given out by the tangible items in the space. For example, consider a company where "employee of the month" plaques are prominently displayed next to trophies and photos of employees receiving bonus checks from the founder. This environment is more likely to accept an e-learning system that includes a competitive/measurement component than a company without all this paraphernalia. On the other hand, e-learning that is predominantly text is less likely to be effective with a TPP that exists in a space filled with a cacophony of loud visual and auditory stimulation.

■ ***Power Indicators***
Who has access to what resources, and how do they maintain this status? You can determine this by looking at the following:

- physical space (office size and location)
- verbal cues (who speaks first, who stops talking when another person starts)
- resource allocation (who selects or influences the distribution of budget and headcount)
- knowledge ownership (who do people go to when they need to know something)

■ ***Participation***
Are most activities performed alone or is there a group activity culture?

■ ***Intangible Messages***
Also called "culture," these are the unspoken, subtle messages transmitted between group members to guide behavior. Important aspects to consider include peer pressure, conformity, and individuality. For example, an e-learning implementation that fosters conformity to certain norms will be more effective in an organization in which peer pressure is strong.

Equipment Readiness

The easiest factor to assess is equipment. Here, you are investigating the same issue (proper equipment acquisition) as you did with the TPP, but the equipment's function will be different. It is no longer simply a question of whether the right equipment is in place to *use* the program, but also whether it can *support*, *maintain*, and *grow* the system.

Clearly, you will be focusing most on the IT department. But do not ignore the potential influence of other system elements such as vendors (Will they still make the necessary equipment to support your system in a few months or years?) and politics (Where is the equipment made? What will happen to your system if there is a crisis that affects manufacturing in that region?).

While the response to this inquiry will differ markedly depending upon the technical requirements of the system, the following are some of the items to look for:

- hosting equipment and software (servers)
- wiring/connectivity equipment
- back-up equipment (generators, back-up devices)
- security software and hardware

What's So Different About E-Learning?

Imagine that you are a pilot, and you fly two planes. You fly a commuter-size plane in the Caribbean as an avocation and a 747 for a major airline as a vocation. Neither plane is better or more important than the other, but each is suited to a different purpose. The commuter plane is appropriate when the destinations are close, there are few passengers, some precision maneuvering may be required, or the space available for landing is minimal. The 747 is appropriate in exactly the opposite situation (that is, when large numbers of people need to be transported great distances, when there is ample space for turns, and so on).

E-learning can come in many different flavors—different configurations that dictate the depth of the needs assessment. The simple e-learning implementations, such as those following an application service provider (ASP) model, will not necessarily look any different from a resource-requirement perspective, than traditional classroom training. This is e-learning as commuter plane.

On the other hand, an e-learning implementation can be an enormous undertaking. Like a 747, these require significantly more preparation due to their increased scope, higher interdependence, and visibility. The factors described below are the reasons why a needs assessment for an e-learning initiative looks different from a needs assessment for a program delivered in the classroom.

■ ***Scope***
When developing an e-learning initiative, the sheer magnitude of the undertaking is typically much larger than when developing a classroom program. The expense, number of people, development time, technological requirements, and delivery options are of greater magnitude in the typical e-learning program than in the typical classroom program.

■ ***Interdependence***
It is possible, even common, for you to conduct a classroom program without the knowledge of anyone but the participants, their immediate managers, and the training provider. In contrast, even the most minute e-learning program requires the involvement of a wider audience—and the implementation requires the involvement of a larger scope of people. Ranging from representatives from the information technology and human resources departments to an organization-wide task force, the scope of the project often dictates that there are more decision makers, more stakeholders, and more links between previously unrelated departments.

■ ***Visibility***
If a traditional training program goes "bad," word of mouth is the only medium through which the participants' dissatisfaction will be voiced. The only people who will express dissatisfaction will be the participants and, maybe at a later date, the people directly affected by their work. Again, due to the scope of the undertaking (especially the high budget and number of resources required), you disseminate the efficacy of an e-learning program to a larger group of people, through a wider variety of channels, than a traditional classroom program.

Stakeholder Assessment Process

■ ***TPP Manager***
The direct manager of the target participant population (TPP) is most immediately affected by the system. Her concern is stellar performance, which translates into maintaining current productivity and quality objectives while preparing the workforce for future demands. The manager seeks a system that:

- leads to measurable gains in productivity and quality
- provides a concrete method of reporting gains in a voice that the manager's audience (that is, CEO, shareholders) can hear
- can be implemented and used with minimal work interruption

Anything that veers from these requirements will either be vetoed, sabotaged, or met with great resistance.

■ ***IT Manager***
Information technology (IT) departments are stretched to capacity. Memories of disastrous enterprise resource planning (ERP) software implementations are still strong (if not constantly fueled through continuing problems), and the idea of working with multiple vendors who bring their own IT "expert" can be less than appealing. This stakeholder is primarily interested in decreasing problems—not increasing benefits. He will be grateful for an e-learning system that reduces the need for IT assistance. If you try to sell a program that IT managers perceive as even a small burden, you will have a hard sell.

■ ***VP Finance Stakeholder***
The finance stakeholder is concerned about reporting bottom-line numbers to upper management, shareholders, and other tertiary audiences. Having an e-learning program with a well designed learning management system that integrates into a larger ERP enables this stakeholder to run reports that establish a relationship between a bottom-line factor (for example, sales, productivity, and customer service rating) and training activities. A poorly designed system, or one that does not involve her, may drain a large pool of financial and human resources from the organization.

■ ***Union Representative***
The union representative is an advocate for the employee. Working conditions, salary, advancement opportunities, and other fairness issues are topics that concern him. He welcomes a system that allows employees to enhance their employability and quality of life. He is not likely, however, to embrace changes in work expectations that result in the following:

- lead to different work conditions for employees—such as the expectation that the employee will participate in e-learning during free unpaid time or will increase their work week without a commensurate salary increase
- go against "fair" or "equal" standards practices—such as allowing a privileged group better access to the learning opportunities or allowing some people betterment opportunities based upon performance in the e-learning program
- are new and unfamiliar—tracking employees or otherwise monitoring their progress in cultures where this has not been done will lead to resistance

■ ***SME***
A subject matter expert (SME) wants to get a job done. She has many years of experience in her field, has gained a great deal of knowledge and competence, and is most likely already an informal educator. She will welcome a system that maintains or increases the level of quality and productivity she considers "right"—as long as it does not add an extra burden to her or render her obsolete. A system that requires her to continue to do her regular job, but also to take on additional responsibilities and tasks—without what she considers "adequate" additional compensation—is a threat.

■ ***Vendor Stakeholder***
The vendor has much to gain from this project. If a good system is implemented, he will receive financial compensation, inspire positive word of mouth, cut business development costs, and potentially make the company more profitable. The vendor is concerned about all the issues facing the other stakeholders, but his primary concern is either profit (if he is a part of an established brand) or esteem (if he is an emerging vendor). A system that is poorly planned or implemented will require unplanned revisions or modification, which cost him money and time. A system that does not meet expectations (or promises) will lead to negative press and word of mouth, which may cost him prospects and increase his business development costs.

Technical Skills Readiness

This factor is also located on the easier side of the assessment spectrum because it is almost as tangible as equipment readiness. Most stakeholders fall into the category of user (VP finance, TPP managers) or developer/supporter (vendor, IT, SMEs). Assess the users as you assessed the TPP. The developers and supporters, however, need an entirely different set of competencies. You must determine whether they have the skills to create, develop, implement, and maintain the system.

Simplify this task by splitting it into two. First, assess the fundamental skills that are relatively constant. Focus on the actual and measurable generic activities that your organization has performed in the past—not on the specific applications of those skills. For example, focus on programming experience and network maintenance experience; do not focus on particular programming and networking experience.

Once you are closer to deciding what your system will encompass, then you should focus on the skills that seem to change with the wind. Assessing these skills can be difficult because you are aiming at a moving target. Here are some tips that should make it easier:

- Join listservs and discussion groups that focus on training and e-learning. Read over the archived posts to see what skills were needed. Post the question to the listservs and discussion groups.
- Look at job descriptions posted on a broad, cross section of e-learning vendor sites. What technical skills and competencies are they seeking?
- Read articles and interview people associated with not-for-profit training organizations.
- Find educational conferences and institutions aimed at technical people. Read over the course titles and descriptions and degree requirements.

Once you have determined what technical skills are necessary, do everything you can to make sure the key developer stakeholders have these skills. This is one area that can destroy your project—or at least your credibility. E-learning, and most of the technology it uses, is a new field for most vendors. Many, eager to make the sale and enthusiastic about their competencies, are not aware of their own limitations. The easiest way to prevent the entire project from going over budget and missing deadlines is to do a hands-on assessment of skills. If a vendor tells you they have three Java experts, do not stop at that:

- Ask an expert you trust who is familiar with that technology—or at least a similar technology—to evaluate the actual skills of the prospective developer.
- Require references and call those references. Ask detailed questions that cover not only the vendor's technical skills but also the client's relationship to the vendor.

You should conduct a similar process for in-house stakeholders. Unfortunately, you wind up watering down your approach, as this assertive show-me-the-money tactic is often too confrontational and politically incorrect when assessing individuals in the same organization. Modify the procedure to get the same information—do not simply accept statements of competency unless you are willing to jeopardize your initiative.

Financial Readiness

This is quite possibly the most under-evaluated factor in the system. All stakeholders influence the financial readiness of the organization. While it may be obvious how stakeholders who directly own the purse strings influence the budget, there are many indirect ways others influence the budget. For example, some critical customers may demand sales representatives or support personnel who are better educated about your products and solutions—causing an immediate need for training, which in turn may divert some of the funds originally intended for your e-learning initiative. It will be easiest to assess this factor when you are closer to determining the budget range required to fund the system.

Use the following questions as a guideline:

- Who manages a budget that could contribute to your initiative?
- How much might they contribute to the initiative? (Do a conservative, moderate, and enthusiastic estimate.)
- Why would they contribute? What will they want in return?
- What is the budget approval process and who has the power to change the budget configuration during that process?
- What is competing for that money?
- How likely is it something unexpected will happen to divert money from your budget?
- What could be a back-up solution if this were to happen?
- Have any relevant technical initiatives been funded recently? If so, be sure to speak in depth to the person who obtained the funding to gain insight into the above questions.

HR Readiness

The twin sister of financial readiness, this factor is concerned with the availability and design of the support system for your e-learning program. After you perform a curricular assessment and have an idea what your e-learning options might be, you must assess the system's ability to support your options.

Unless your organization is currently residing on Mars, chances are you face the same constraints as most organizations:

- It is difficult to find skilled workers.
- There is not enough "headcount" to staff up properly—even if there were budget to pay people.
- There is not enough budget to hire, retain, and train the best and the brightest. You are forced to either go without or accept less than ideal service and productivity levels.
- The staff to customer ratio is not adequate, leading to less than ideal customer service.

If they exist, it is important to recognize and acknowledge these limitations because they will directly impact your e-learning initiative. There are two forms of HR you will need to make your initiative a success:

1. People to design and implement your system.
2. People who will support it.

At this point, you should have created macro-level objectives, assessed learners, and assessed factors in the system other than the TTP. The last step is to convert your information into action by creating micro-level objectives that address specific elements of the e-learning program.

Your objectives should include, at a bare minimum:

- content to cover
- delivery methods
- timeframe
- stakeholder involvement
- obstacle avoidance tactics
- metrics (what you will use to measure effectiveness of the program)

Once this is completed, you should change one or two of the macro-level objectives you wrote at the beginning of the process to reflect the more educated vision of how the e-learning program will achieve business results.

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Job Aid

E-Learning Needs Assessment

This assessment is divided into eight sections, corresponding with the e-learning readiness factors. Within each section are questions designed to stimulate thought on a particular aspect of that factor. Select only one response for each question, making sure the response is the one most representative of the reality of your situation. You should respond to all of the questions without regard to the order in which they appear below.

There is a number in parenthesis (point value) to the right of each response. After selecting a response for each question, total your points for the section. Write that number in the space allotted at the bottom of each section. When you have completed all the questions, total the section points for a cumulative score.

Psychological Readiness

1. Are the TPP's learning styles well suited for e-learning?

- ☐ Yes (1)
- ☐ Most (2)
- ☐ Some (3)

2. What has been the response of the TPP to any transitions such as reorganizations, mergers, management changes, conversions to computer systems, and so on?

- ☐ Most embrace it (1)
- ☐ Most accepted it in time (2)
- ☐ Most resisted (3)

3. Where would you place most of the TPP on Michael Porter/Geoffrey Moore's Technology Adoption Curve?

- ☐ Most are innovators/enthusiasts (2)
- ☐ Most are early adopters/visionaries (1)
- ☐ Most are pragmatists (3)
- ☐ Most are conservatives (4)
- ☐ Most are skeptics/luddites (5)

4. What has been the involvement of the TPPs in the planning and design process?

- ☐ Most directly involved (1)
- ☐ Most opinion leaders involved (2)
- ☐ A few representative members involved (3)
- ☐ None are involved (4)

Psychological Readiness Score

Combine the point value corresponding to your responses, place here_____

Sociological Readiness

1. Has a pilot been included in the plan or completed?

- ☐ Pilot completed (1)
- ☐ Included in plan (2)
- ☐ Not planned (3)

2. Have managers been heard to say anything similar to the following:

- This is great! They can take classes in their free time or at home!
- I just want to make sure they don't spend all day on the Internet or sending emails.
- As long as it does not affect their productivity.

- ☐ Nothing similar to this (1)
- ☐ Something similar to one phrase (2)
- ☐ Something similar to most phrases (3)

3. How is the TPP currently monitored or appraised?

- ☐ Anonymously (2)
- ☐ Not appraised or no records maintained (3)
- ☐ Records kept confidentially in HR department (2)
- ☐ Records kept confidentially with manager/department (3)
- ☐ Emails and Internet use monitored (2)
- ☐ Phone calls monitored and recorded (1)

4. Is there a noticeable tendency to embrace homogeneity? (for example, in dress, hobbies, possessions, conversation)

- ☐ Yes, much overlap between individuals (3)
- ☐ 50/50 (2)
- ☐ No, the group is very diverse in many ways (1)

Sociological Readiness Score

Combine the point value corresponding to your responses, place here _____

Environment Readiness

1. Are there any large external political or legal barriers you need to surmount before you can implement any part of your e-learning program (for example, unions)?

- ☐ Yes, numerous large barriers (3)
- ☐ Yes, some large barriers (2)
- ☐ Yes, a few large barriers (1)
- ☐ No barriers we have not surmounted in the past (1)

2. Does the target audience include people who speak significantly different languages?

- ☐ Yes, many speak different primary languages (3)
- ☐ A few speak different primary languages (2)
- ☐ Most speak the same second language fluently (2)
- ☐ A few speak the same second language fluently (3)
- ☐ Most speak the same primary language (1)

3. Does your gut instinct tell you the time is right for e-learning?

- ☐ Yes (1)
- ☐ No (2)

4. What is the organization's attitude towards training?

- ☐ It is an unnecessary cost center (4)
- ☐ It is a necessary evil (3)
- ☐ It helps us indirectly (2)
- ☐ It is a critical part of our success (1)

5. What is the revenue model of the planned e-learning initiative?

- ☐ There is no model yet (3)
- ☐ A cost funded by HR (3)
- ☐ A cost funded departmentally (2)
- ☐ A source of revenue (1)

Environmental Readiness Score

Combine the point value corresponding to your responses, place here _____

Human Resources Readiness

1. Does the vendor have the people in place to create and support your project?

- ☐ Yes, well staffed, impeccable service (1)
- ☐ Yes, reasonably staffed, good service (2)
- ☐ No, poorly staffed or poor service (3)

2. Is there an e-learning champion on board who has both the informal and formal power to make the project happen?

- ☐ Yes (1)
- ☐ No (2)

3. Is there a help desk or tutor available for TPP?

- ☐ Yes, immediately available to TPP (1)
- ☐ Readily available to TPP (1)
- ☐ Available with a wait (3)
- ☐ No dedicated resource (4)

4. Does the vendor (or your internal department) have adequate human resources earmarked to provide user training on the new system?

- ☐ Yes, surplus resources (1)
- ☐ Yes, adequate resources (2)
- ☐ No, but currently staffing up (3)
- ☐ No (4)

Human Resources Readiness Score

Combine the point value corresponding to your responses, place here _____

Financial Readiness

1. Has a budget appropriate to the endeavor scope been provided?

- ☐ Yes, exceeds needs (1)
- ☐ Yes, meets needs (2)
- ☐ Budget provided but inadequate (3)
- ☐ No budget yet (4)

Job Aid

2. Have you created macro objectives demonstrating how e-learning will help your organization reach its current and near-future goals?
   - ☐ Yes, effective and convincing (1)
   - ☐ Initial ones created, need improvement (2)
   - ☐ None created (3)

3. Did the goals originate with the CEO or another high-influence individual?
   - ☐ Yes (1)
   - ☐ No (2)

4. Are other technical initiatives being implemented due to their cost-saving potential (for example, Web conferencing)?
   - ☐ Yes, many (1)
   - ☐ Yes, some (2)
   - ☐ Yes, very few (2)
   - ☐ No, this is a first (3)

Financial Readiness Score

Combine the point value corresponding to your responses, place here _____

Technical Skills Readiness

1. Does the target audience know how to type?
   - ☐ No (2)
   - ☐ Yes (1)

2. Does the TPP know the basics of how to use a computer (for example, save, open folders, launch programs)?
   - ☐ Yes (1)
   - ☐ No (4)
   - ☐ Some (3)
   - ☐ Most (2)

3. How long have the TPP been using computers?
   - ☐ Less than 1 year (4)
   - ☐ 1-2 years (3)
   - ☐ 2-5 years (2)
   - ☐ 5+ years (1)

4. Has your prospective vendor previously created exactly what they are creating for you?
   - ☐ No (2)
   - ☐ Yes (1)

5. Is research and information discovery a regular part of the TPP's current job?
   - ☐ No, their jobs are mostly routine (3)
   - ☐ Yes, often need to solve simple problems in a group (2)
   - ☐ Yes, often need to solve complex problems in a group (1)
   - ☐ Yes, frequently need to solve complex problems by themselves (1)

Technical Skills Readiness Score

Combine the point value corresponding to your responses, place here _____

Equipment Readiness

1. Does the TPP have better than adequate equipment?
   - ☐ No (3)
   - ☐ When we get budget (3)
   - ☐ Plan to receive it soon (2)
   - ☐ Already have it (1)

2. Does the system require anything that is "on its way" but not readily available yet (for example, broadband)?
   - ☐ No, most elements exist (1)
   - ☐ Most elements have been in existence for a while (proven track record) (1)
   - ☐ Some we have, some are being developed (2)
   - ☐ Most are yet to have widespread availability (3)

3. Does your facility have online access capabilities that exceed what the vendor suggested?
   - ☐ Yes, far exceeds (1)
   - ☐ Yes, exceeds moderately (2)
   - ☐ Meets vendor requirements (2)
   - ☐ No, does not meet vendor requirements (3)

4. Have you created a plan that outlines the details of acquiring, maintaining, and upgrading equipment?

- ☐ Created, sign-off from all key stakeholders (1)
- ☐ Created, pursuing buy-in (2)
- ☐ Rough draft created (2)
- ☐ Not created (3)
- ☐ Not planned (3)

Equipment Readiness Score

Combine the point value corresponding to your responses, place here _____

Content Readiness

1. Does the curriculum involve a great deal of subjectivity and judgment calls (for example, diversity training), or is it fairly straight-forward and objective (Newtonian physics)?

- ☐ Very subjective and discretionary (3)
- ☐ Advanced content subjective, intro is straight-forward (2)
- ☐ Objective and straight-forward (1)

2. To what format does the TPP's response to the subject matter lend itself ?

- ☐ Rigid compartment (for example, multiple choice) (1)
- ☐ Unstructured response, verbal/prose (2)
- ☐ Strictly quantitative (1)
- ☐ Open-ended opinion (3)

3. Is the TPP accustomed to learning this specific subject matter with a live instructor?

- ☐ Always (1)
- ☐ Usually (2)
- ☐ Only exposed to e-learning (3)

4. What are some of the characteristics of the existing content that you intend to port into e-learning?

- ☐ Already chunked into small pieces (1)
- ☐ Already contains metatags and Learning Object format (1)
- ☐ Non-linear (2)
- ☐ Linear and/or one rigid/established teaching method (1)

5. Will you require competency assessment upon completion of instruction?

- ☐ Yes, for all (1)
- ☐ For some (2)
- ☐ No (3)

6. Is the subject matter meant to be personalized by the student?

- ☐ Yes, extensively (1)
- ☐ Yes, in a few areas (2)
- ☐ No (3)

7. Does the desired competency goal require improvement of motor skills (with the exception of typing)?

- ☐ Yes (3)
- ☐ Somewhat (2)
- ☐ Very few to none (1)

8. What phase of its lifecycle is the desired subject matter in?

- ☐ Not yet developed (1)
- ☐ Exists, just need to be ported (2)

9. How much of the subject matter is already in multimedia format (for example, audio, video)?

- ☐ More than 80 percent is multimedia (1)
- ☐ More than 50 percent is multimedia (1)
- ☐ Less than 30 percent is multimedia (2)
- ☐ Less than 10 percent is multimedia (3)

10. How quickly does the subject matter change?

- ☐ Constantly (1)
- ☐ Frequently (2)
- ☐ Often (2)
- ☐ Very rarely (3)

Content Readiness Score

Combine the point value corresponding to your responses, place here _____

After totaling your section points for a cumulative score, refer to the scale on the following page to determine your e-learning readiness.

STATEMENT OF OWNERSHIP, MANAGEMENT, AND CIRCULATION

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	(2)	In-County as Stated on Form 3541	0	0
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17. I CERTIFY THAT ALL INFORMATION FURNISHED ABOVE IS TRUE AND COMPLETE: Cat Sharpe Russo, Editor and Circulation Director

Job Aid Scale

Score: 40-60

What are you waiting for? You are the envy of every learning professional alive today. An overall score this low means you have much more flexibility and choice. Given the ideal system surrounding your initiative, you have considerable leeway in determining what methods to use, when to introduce each one, which business objectives to target, and so on. You also have the luxury of making a few mistakes without derailing the project. You do not, however, have the luxury of inertia. Even in an ideal situation, there are things that can and will go wrong. Continue monitoring the factors that can most affect your project, and continue to plan as far in advance as possible.

Score: 61-99

It could be worse. Most e-learning projects fall somewhere in this zone. The best way to proceed is to carefully dig deeper into each factor, trying to pinpoint exactly what issues are cause for concern and which advantages you can magnify. Modify your plan to account for or leverage those areas. You do not have a significant margin for error: You should address the factors that are within your control and carefully and frequently monitor factors that are out of your control.

Score: 100-122

Red flag time. Take a moment to reevaluate your goals and objectives, and ask this question: Is e-learning the best way to accomplish our goals? If the answer is yes, select your methods and introduction order carefully. Your situation is sensitive: Any issue that might normally be insignificant can easily become a showstopper. First, alert relevant and influential stakeholders to the risks you are facing and enlist their support. Here are some possible next steps:

1. Pinpoint and prioritize the areas of concern. Create a plan to minimize or eliminate the highest 5 or 10.
2. Switch your implementation plan to introduce only those methods that will be least intrusive and "different."
3. If you have not already created at least one contingency plan, do so now.

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9503	Core Competencies
8504	Facilities Planning
9913	Global Training Success
8506	Good Learning Environments
0007	How to Budget Training
9603	How to Partner
8605	Market Your Training Program
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9003	Training Managers to Train
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Iss. No.	
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9807	Chaos & Complexity Theory
9903	Knowledge Management
9306	Learning Organizations
8812	Organization Development
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0006	Storytelling
9703	Systems Thinking

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9702	From Training to Performance
9811	Fundamentals of HPI
9606	Link Training to Performance Goals

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