



Bundesministerium für
wirtschaftliche Zusammenarbeit
und Entwicklung



How to conduct a TNA

Guideline for the practical planning and implementation
of a Training Needs Analysis (TNA)



Content

FIGURES AND TABLES	05
.....	
1 PREFACE	08
.....	
2 INTRODUCTION OF THE TRAINING NEEDS ANALYSIS AS A TOOL FOR HR DEVELOPMENT	10
.....	
3 BASIC STEPS OF THE TNA	12
3.1. Analysis of the Organisation's Strategy	16
3.2. Identifying the Target Profile	17
3.2.1. Job Description	18
3.2.2. Job Specification	21
3.3. Identifying the Actual Profile	25
3.4. Gap Analysis and Competency Matrix	26
3.5. Training Identification and Training Plan	27
3.5.1 Learning Objectives	29
.....	
4 INSTRUMENTS FOR COLLECTING INFORMATION; GUIDELINES FOR THEIR USE	32
4.1. Interview	33
4.2. Questionnaire	35
4.3. Workshop	36
4.4. Observation	37
4.5. Benchmarking	38
.....	
5 PLANNING THE TNA	41
5.1. TTI Tips	43
.....	



Annex



6. ANNEX	44
6.1. Glossary	46
6.2. Abbreviations	47
6.3. Selection of Suggested Verbs for Task Statements	48
6.4. Examples of Features of the Four Key Competencies	50
6.5. List of Selected Action Verbs Grouped According to Bloom's Taxonomy	51
6.6. Selected Templates	52
6.6.1 Job Description and Job Specification	54
6.6.2 Target Profile Director Interview	56
6.6.3 Target Profile Employee Interview	60
6.6.4 Actual Profile Supervisor Interview	64
6.6.5 Actual Profile Employee Questionnaire	67
.....	
6.7. List of Digital Templates and Tools Available from WAJ and GIZ	70
I. Templates: Job Description and Job Specification	
II. Templates: Target Profile:	
a. Target Profile Director Interview	
b. Target Profile Supervisor Interview	
c. Target Profile Employee Interview	
d. Target Profile Benchmarking Interview	
e. Target Profile Workshop Agenda and Programme	
III. Templates: Actual Profile	
a. Actual Profile Supervisor Interview	
b. Actual Profile Employee Questionnaire	
c. Actual Profile Employee Interview	
IV. Tools: Invitation und Information Material	
a. General Presentation of the TNA Process	
b. General Presentation of Competencies	
c. Presentation of Changes	
d. Elevator Pitches (TNA and Competencies)	
e. Invitation Letter to Participate in TNA Process (Field Visit)	
f. Invitation Letter for Workshop	
V. Tools and Templates: Explanation and Documentation of Results (Target Profile, Actual Profile, Competency Matrix, Training Plan)	
a. Tool: Description of the Different TNA Steps	
b. All Templates of the TNA Steps (MS-Excel Spreadsheet)	
c. Tool: Examples of Training Programmes	
d. Tool: Oracle	
VI. Template: Implementation Plan and Milestones for the TNA Process	
.....	

Figures and Tables

FIGURES:

Figure 2.1: Process for analysing the gap between required and actual competencies and developing training programmes based on this gap	10
Figure 2.2: Job analysis is a basic tool for Human Resource Management	11
Figure 3.1: The TNA process	12
Figure 3.2: TNA process and the transfer to everyday work (workshop drawing)	14
Figure 3.3: The job analysis process	18
Figure 3.4: Example for job description and time allocation in %	20
Figure 3.5: From knowledge building to competencies	21
Figure 3.6: Bloom's Taxonomy and the verbs describing observable action	23
Figure 3.7: Plan to elaborate the target profile	24
Figure 3.8: Gap analysis of the target and actual profiles	26
Figure 3.9: Competency Matrix	26
Figure 3.10: Excerpt from the Training Plan	28
Figure 3.11: Excerpt from the Training Plan	28
Figure 3.12: Training Activities	28
Figure 3.13: Bloom's Taxonomy and increasing specificity	30
Figure 4.1: Arrangement of chairs to create a cooperative atmosphere (workshop drawing)	34
Figure 4.2: Arrangement if time is limited (workshop drawing)	34
Figure 4.3: Tips for the interviewer (workshop drawing)	34
Figure 4.4: Tools for observation (workshop drawing)	37
Figure 4.5: Tips for observing (workshop drawing)	37
Figure 5.1: Planning the TNA process	42

TABLES:

Table 1: Advantages and disadvantages of a TNA	13
Table 2: Advice on how to phrase tasks	19
Table 3: Description of the four competencies and examples of features	22
Table 4: The four levels of target profile competencies	23
Table 5: Advice on how to phrase competencies for the applying, analysing, evaluating and creating levels	23
Table 6: Weighting factors to generate the target profile	24
Table 7: Weighting factors to generate the actual profile	25
Table 8: The four levels of actual profile competencies	25
Table 9: Structure of learning objectives according to the ABCD model	29
Table 10: Examples of learning objectives using Bloom's taxonomy and the ABCD model	30
Table 11: Job description changes, instruments, involved stakeholders	41

This guideline provides a set of proven methods and instruments to determine the training needs of an organisation.



They were developed and tested between May 2017 and May 2018. A group of WAJ staff (TTI) adapted the instruments to the Jordanian context and tested them in three pilot phases.





JORDAN IS RANKED AMONG THE WORLD'S WATER-POOREST COUNTRIES, WITH LIMITED WATER RESOURCES AND LOW RAINFALL.

WATER IS AN ESSENTIAL ELEMENT FOR HOUSEHOLDS, INDUSTRY AND AGRICULTURE. THE GROWING WATER DEFICIT FROM ONE YEAR TO ANOTHER AND A RISING POPULATION CAUSED BY THE SYRIAN INFLUX TO JORDAN POSE INCREASING CHALLENGES AND SERIOUS THREATS.

The Water Authority of Jordan (WAJ) is primarily responsible for the public water supply, wastewater services and related projects, as well as the overall water resources planning, construction, operations and maintenance of the infrastructure. It is also in charge of developing potential water resources, increasing their capacity, improving their quality, and subsequently supervising the delivery of water services, by sector professionals, to ensure that standards for implementation are met in terms of quality of work, number of staff, staff skill levels, etc. One of the strategic objectives of WAJ is to improve the technical expertise and capacities of its staff by training the necessary operational, technical and administrative skills.

Majed Alqtaishat

*Assistant Secretary General for Administrative Affairs
Water Authority of Jordan*

The “Vocational Education and Training for Jordanians and Syrian Refugees in the Water Sector (VTW)” project advises WAJ on capacity building in order to implement a comprehensive programme of continuous professional development for its staff. VTW therefore contributes to reducing water losses, improving water quality and energy efficiency, and safeguarding long-term investments in infrastructure, which will be reflected in the efficiency of the provided services and customer satisfaction, as envisaged in the National Water Strategy. To tailor the capacity building programmes to the actual needs, WAJ requested the VTW project team to provide trainings that enable WAJ staff to develop their own TNA processes and strengthen their human resources and institutional capacity. These activities, to be carried out by WAJ staff members, will guarantee that the gained knowledge will remain within the organisation and sustain independent development.

Dirk Winkler

*Team Leader
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Executive Summary



The Training Needs Analysis (TNA) is not only a basic tool for HR development (HRD), but also acts as a catalyst for the success of the whole organisation. Linking TNA and HRD with the organisation's strategy helps the whole organisation to reach its vision. A TNA is an instrument to identify the required or desired training. In the course of the TNA process, the desired and required capabilities of job incumbents are identified, actual staff capabilities are assessed, and gap fillers are designed for 'what is needed now and required in the future' and 'what is available now'. In short, the process can be summarised as:

FILLING THE GAP BETWEEN 'WHAT IS NEEDED' AND 'WHAT IS AVAILABLE'

This guideline was written along the TNA process. Chapter 2 describes the TNA as a fundamental tool for HR development, and shares ideas on the sustainability of the process. Chapter 3 explains the basic steps of the TNA process, starting with identifying the required and available competencies, finding the gaps, and describing activities to fill these gaps. The different steps also include decisions by TTI on how to summarise the results of the different answers. The data are gained with different TNA tools, such as interviews, questionnaires, workshops, etc., as described in Chapter 4. All these instruments allow different staff members to actively take part in the process. Participation of job incumbents increases their motivation and provides a close link to the social reality, and participation of top management or experts guarantees that future developments are considered. Chapter 5 provides advice on planning the TNA process, based on TTI's experiences. It shows options for slightly revised jobs, significantly revised jobs and newly created jobs, to help choose the right tools, and describes a project planning tool that helps define stages and/or milestones to facilitate future implementation. Finally, it provides tips compiled by TTI to help you analyse training needs. The Annex includes a glossary and abbreviations, selected templates, and suggestions for expressing learning objectives, competencies and tasks.

All templates and tools are available as digital files for downloading and can therefore be used immediately to analyse training needs. Please contact WAJ, GIZ, or the author of this Guideline for more information. The templates are empty and you will need to fill them according to the new job to be analysed, similar to interviews or questionnaires.

2. Introduction of the Training Needs Analysis as a Tool for HR Development



Many organisations spend a lot of money every year to train and develop their staff. Very often the activities do not provide the expected results because the training does not meet the specific business needs of the organisation or fit the professional development needs of its staff. What can be done to solve this dilemma?

We suggest you begin by analysing your organisation's needs, requirements, necessary competencies and performance levels for specific tasks, and comparing them with the actual staff competencies. The returned information gives you the basis ('gap') for the development of training offers and provides, among others, the core of any training programme (see [Figure 2.1](#)).

The TNA is a systematic investigation to determine whether training needs exist within your organisation, and to clearly identify the existing gap between what is needed and what is available.

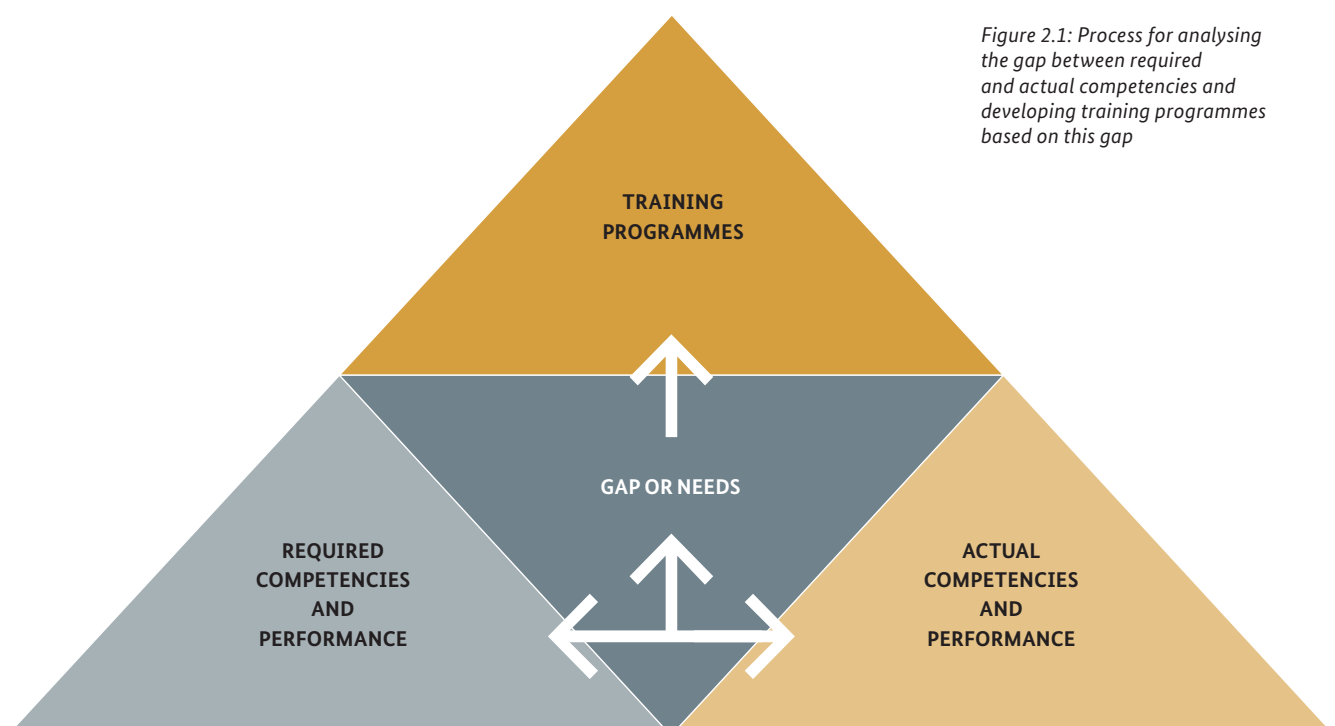


Figure 2.1: Process for analysing the gap between required and actual competencies and developing training programmes based on this gap

JOB ANALYSIS

“The process of obtaining information about jobs by determining their duties, tasks, or activities.”

Source: (Snell, Morris, & Bohlander, 2016), p. 132

“Systematic process of determining skills, duties, and knowledge for performing jobs in an organisation.”

Source: (Mondy & Martocchio, 2016), p. 113

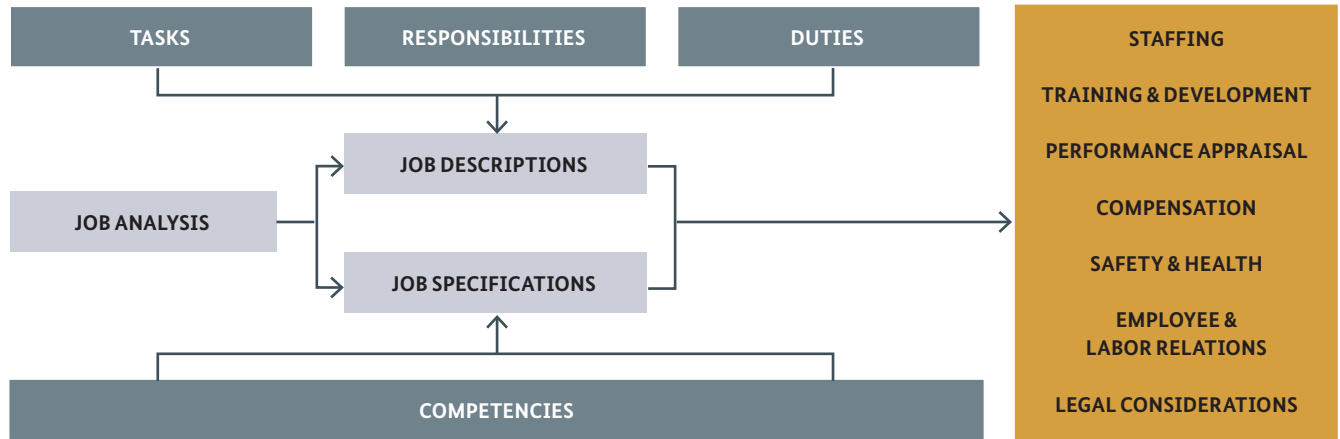


Figure 2.2: Job analysis is a basic tool for Human Resource Management
Source: (Mondy & Martocchio, 2016), p.114 (adapted)



3. Basic Steps of the TNA

Analysing the training needs is like asking questions and conducting different tests to find the cause of an allergy, and then healing the sufferer rather than only taking measures to relieve the symptoms. By analysing the needs, you are investigating the reasons for and the extent of deficiencies and seeking to develop a cure, i.e. how to heal your organisation.

A SYSTEMATIC TNA PROCESS COMPRISES THE FOLLOWING ACTIVITIES:

- ➔ Analysing the vision, strategy and goals of your organisation.
- ➔ Assessing tasks, duties and responsibilities, and identifying requirements (e.g. level of competencies), (see Figure 2.2).
- ➔ Collecting data using different methods and instruments.
- ➔ Identifying the training needs (gap) between the desired capability (required level of competencies) and current capability (actual levels of competencies) of your staff (see Figure 2.1).
- ➔ Reducing the gap using appropriate means (e.g. developing, implementing and evaluating training activities).

Different stakeholders will be addressed throughout the process, e.g. top management, technical experts, managers and supervisors, job incumbents, and colleagues.

Correctly identifying the roots of your problems is the key to developing appropriate measures to cure your organisation.

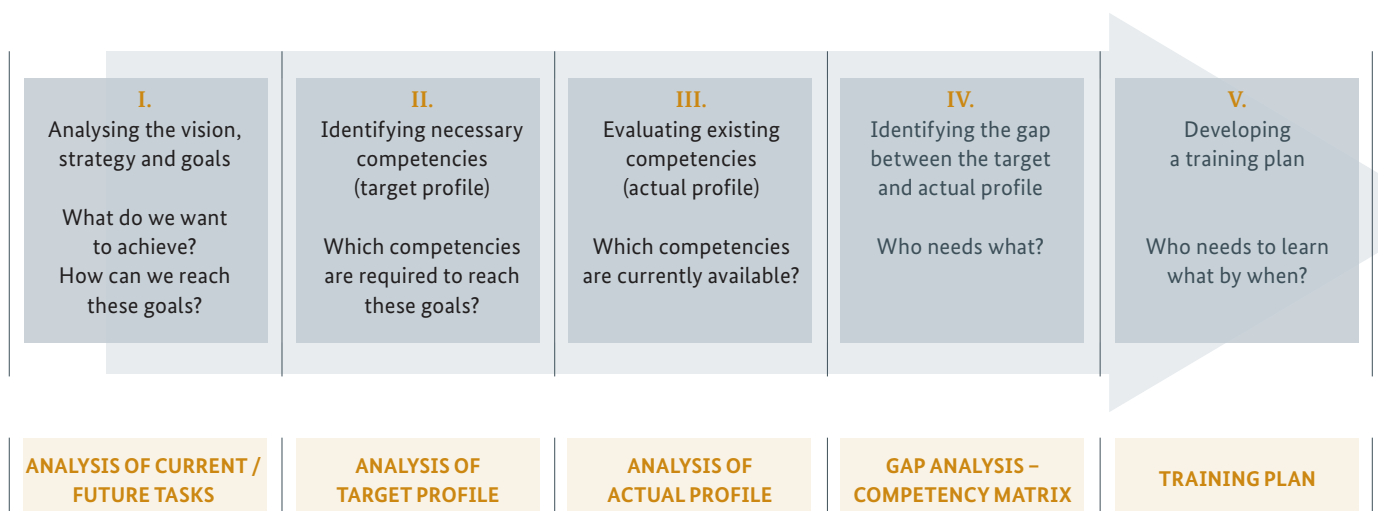


Figure 3.1: The TNA process

Before undertaking training, it is important to analyse or assess the performance problems. Training might not always be the right solution for a particular problem. If the existing problems are caused by missing equipment or inadequate policies or procedures, then new tools must be bought or policies changed.

The TNA process has both advantages and disadvantages. In general, it is a long process and requires a lot of coordination and organisation. Ultimately, the advantages clearly outweigh the disadvantages: employees and supervisors participate in the process, and the training needs are analysed realistically, individually, and in a future-oriented way.

ADVANTAGES	DISADVANTAGES
The TNA assesses the actual profile of each job incumbent, and the designed training activities are based on their individual needs	The TNA process requires a lot of time and considerable effort to assess, collect, analyse and summarise all the findings.
The TNA helps to identify the real reason for performance deficits. Often the problems result from obstacles within the organisation or inadequate equipment. The TNA will help to determine the real reason, which might not always be solvable with training activities.	After the real reasons for performance deficits have been identified, the necessary changes within the organisation require additional management decisions.
The TNA will lead to customised and more appropriate trainings, as opposed to standardised trainings.	A number of additional training activities for fewer persons need to be organised and financed.
Due to the participation of top management and supervisors in the TNA process, they will support the training activities for their staff with budget, time, etc. Ideally, they will also support the learning transfer to the workplace.	Several stakeholders are involved in the process; some are interviewed first for the target profile and then for the actual profile. All these activities have to be organised and coordinated.
As the staff actively participate in the TNA process, they can express their needs and are motivated to join the training.	As the staff are not familiar with TNA terminology (e.g. 'competencies'), they might have difficulties expressing their needs and/or evaluating their gaps
The analysis process makes it easier to determine the content, scope, type and outcomes of trainings more specifically.	
The TNA provides the fundamentals to measure outcomes or changes resulting from the training. Employees use what they have learned and apply it in their everyday work.	

Table 1: Advantages and disadvantages of a TNA

→ It is a simple equation:
 $Training\ Needs = Desired\ Capability - Current\ Capability$

→ "Solutions to problems are like keys in locks; they don't work if they don't fit, and if the solutions aren't the right ones, the problem doesn't get solved"

Source: (Mager/Piper, 1970) downloaded 5 Mar 2018 10:29



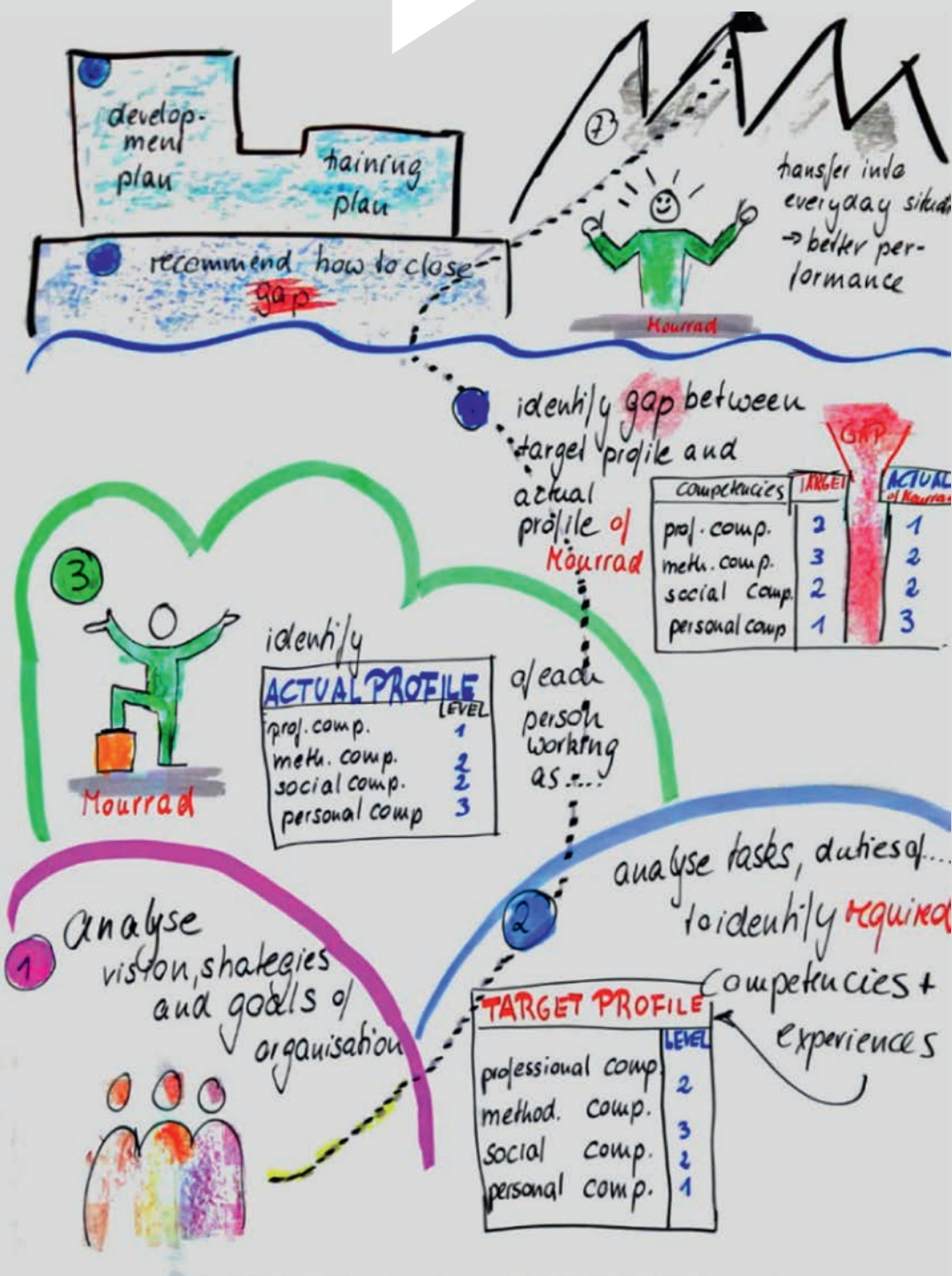
View into the future (workshop drawing)

Figure 3.2: TNA process and the transfer to everyday work (workshop drawing)

Figure 3.1 describes the basic steps of the TNA and provides some key terms. In contrast, Figure 3.2 shows the process and explains that the target profile is a list of competencies, describing an ideal candidate¹. Only the actual profile describes the competencies of a real incumbent (in this example: 'Mourrad'). The actual profile is assessed for each job incumbent, not only for Mourrad.

This Guideline concentrates mainly on steps up to the training plan (as shown in Figure 3.1)

¹ During the training, we paraphrased the target profile as a list describing 'Superman'.



**DURING THE TNA PROCESS, THE FOLLOWING
FOUR QUESTIONS WILL BE POSED TO DIFFERENT GROUPS
OF PERSONS**



What are the main tasks and related activities of the target group?



Will the tasks and related requirements change in future?



Which competencies (professional, methodological, social, personal) will be required and at what level?



What is sufficient, what is missing, what should be developed?

3.1. Analysis of the Organisation's Strategy

→ THE FIRST STEP OF A TNA EXAMINES THE ORGANISATIONAL CONTEXT.

It is important to consider the vision, policy, goals and strategy in order to find out what the organisation wants to achieve in future, and to analyse the roles and responsibilities in order to find out which jobs have to be assessed.

BEGIN BY ASKING THE FOLLOWING QUESTIONS:

- What are the present and future job elements?
- Which professional requirements are needed today and in future?
- Which social and personal requirements are necessary for the organisational processes and structures?
- What overall knowledge of products and processes is required?
- Which job has which responsibilities?

YOU THEN NEED TO TAKE A CLOSER LOOK INTO:

- **Changes due to future organisational developments, such as:**
 - a. digitalisation of devices or processes
 - b. introduction of new tools or equipment
 - c. introduction of team concepts in operation
 - d. changes in the legal provisions, etc.²
- **New challenges for your employees resulting from the changes:**
 - a. how to work with digital devices or digitalised processes
 - b. how to change attitudes; how to operate new machines
 - c. how to take on more responsibilities (social and methodological competencies)
 - d. how to understand and apply new provisions.
- **Pro-actively initiating activities, based on the above information:**
 - a. training in handling digital devices or processes
 - b. knowledge transfer and requesting trainings by suppliers
 - c. team development and training of social competencies
 - d. knowledge transfer, etc.

- The basic idea behind this first step is to anticipate future developments and identify the requirements, not only on the current, but also on the future scope of the job. In general, this step also helps to identify the jobs that need to be analysed most urgently.

PURPOSE OF THE FIRST STEP:

What are the intended developments and goals the organisation wants to achieve in future?

² Adapted and translated from (Forschungsinstitut Betriebliche Bildung, 2009)

3.2. Identifying the Target Profile

→ THE SECOND STEP OF A TNA ANALYSES THE SPECIFIC JOB.

What are the current and future tasks, duties and responsibilities (using the findings from step one) and what is the required level of competencies to successfully perform the job today and in future in order to reach the goals of the organisation?

To this purpose you can use the available job description, but please make sure that it includes not only the present but also future job tasks, duties and responsibilities (see [Chapter 3.1](#)). If this is not the case, you (as the job analyst) have to collect the missing information and analyse it. Job analysts usually gain information from the incumbents and their supervisors. In exceptional cases, if the job is newly established or will change a lot in the future (see [Chapter 5](#)), experts or benchmarking partners (see [Chapter 4.5](#)) also need to be involved.

The most common methods of collecting information are interviews, questionnaires, observation, and diaries (see [Figure 3.3](#) and [Chapter 4](#)). For example, the job analyst can interview the incumbents and their supervisors about the job parameters, or ask experts in the case of particularly complex jobs. The job analyst can distribute standard questionnaires for the employees to fill out individually. The questionnaire addresses issues similar to the interview³. To learn more about the respective job, the analyst can observe the job incumbent and record the information in a standardised form. In some organisations, job incumbents are asked to keep diaries to record their work activities.

→ The basic idea behind this second step is to identify the competencies, etc., that are required in order to successfully perform a job today and in future. It describes your ideal job incumbent.

The job analyst has to analyse the acquired information. This includes facts and figures about tasks, responsibilities, conditions, duties, job context, performance standards and equipment used, as well as the required qualifications, knowledge, skills and experience. Whereas the first listed items will be used mainly for the job description, the latter provide details for the job specification.

The job analyst has to check the accuracy of the findings by looking for information that does not agree with other facts from other sources. Sometimes, job incumbents either exaggerate or underestimate their job responsibilities. Particularly if they have worked in their job for a long time and are good at it, they think the required skills are higher than they really are. Sometimes the supervisors only have an approximate idea of what their staff are doing. Therefore collecting the data from a representative sample (job incumbents) and from different perspectives (supervisors or directors) is important to determine the target profile. Once the target profile has been completed, it should be checked for accuracy again. The actual profile will be collected from supervisors and incumbents (see [Chapter 3.3](#)).

PURPOSE OF THE SECOND STEP:

Which competencies at what level are needed to reach the organisational goals?

³ In the WAJ context, the questionnaires are distributed to the incumbents to analyse their actual profile.

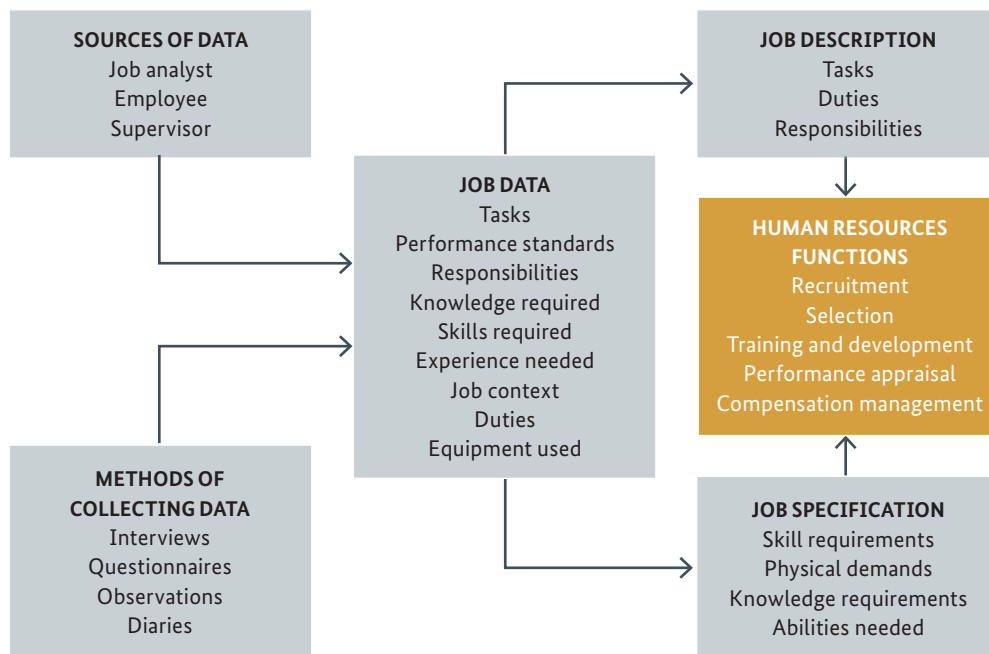


Figure 3.3: The job analysis process
Source: (Snell, Morris, & Bohlander, 2016), p.136

The following two sections present the general standards for writing a job description and job specification, including TTI's decisions on certain items.

→ 3.2.1 JOB DESCRIPTION

After you have analysed the tasks, responsibilities, job context, conditions, equipment used, etc., you can start writing the job description. There are several rules to be considered.

The job description is a written template that contains a number of different categories: job details, purpose, and the main and additional tasks (see also Annex 6.6.1). A template for new TNA processes is available from WAJ and GIZ (see also Annex 6.7, Template I), and can be adapted as necessary.

THE JOB DETAILS

The job details contain information relating to the organisation, such as the division or department, the wage category, etc. In the WAJ context, it was decided to state the following:

- Job Type and Job Type Code
- Category and Category Code
- Type of Group and Group Code
- Level and Level Code
- Job Title and Job Title Code
- Professional Group and Professional Group Code
- Employment Symbol Code

JOB DESCRIPTION –
A statement of tasks, duties, and responsibilities of a job to be performed.

Source: (Snell, Morris, & Bohlander, 2016), p.132

THE JOB PURPOSE

The job purpose normally contains no more than two or three sentences. This statement summarises the main points of the job description, such as key responsibilities, functions, duties, and any other pertinent information (i.e. scheduling requirements, travel, etc).

Example for an Employment Assistant:

Purpose: “Performs professional human resource work in the areas of employee recruitment and selection, testing, orientation, transfers, and maintenance of employee human resource files. May handle specific assignments and projects related to ... affirmative action, employee grievances, training, or classification and compensation. Works under general supervision. Incumbent exercises initiative and independent judgement in the performance of assigned tasks.”⁴

Tasks or functions usually describe a set of activities or a work unit needed to produce results, and that are essential for successful job performance. Statements are arranged in their order of importance. The ranking can usually (but not always) be gauged by the percentage of time devoted to the respective task.

The verbs should be specific and active (e.g. ‘writes’ rather than ‘is responsible for’), and have an object (e.g. ‘writes reports’). Unless the purpose of the task is obvious, the statement should say why the task is done, or what is to be accomplished upon task completion (e.g. ‘writes reports to summarise new enrolment procedures for new employees’).

Table 2 provides some examples:

ELEMENTS	ACTION VERB	OBJECT OF THE VERB	WHY THE WORK IS DONE	HOW THE WORK IS DONE ⁵
Focus	WHAT the job incumbent does	To WHOM or WHAT it is done	Expected output	Procedures, tools, equipment, work aids
General example	Sorting	correspondence and reports	to facilitate filing	alphabetically.
Example: Employment Assistant	Distributing	new HR policies and procedures	to provide information to all employees and managers	through e-mail, the organisation’s intranet, meetings, or personal contact.

Table 2: Advice on how to phrase tasks

TO THIS PURPOSE, WE ADVISE THE FOLLOWING:

- Avoid verbs like understand, because this is not measurable or observable. It is not an action verb.
- Omit articles, which are not necessary, e.g. *a, an, the* ... to write an easy-to-understand description.
- Use clear and concise language, e.g. avoid adverbs or adjectives such as *frequently, some, complex, occasional, several*, or define these ambiguous qualitative terms clearly.
- Use gender neutral terminology, e.g. he/she or ‘they’, or construct sentences in such a way that gender pronouns are not required.
- Define uncommon abbreviations.
- Omit references to personal qualities or skills.

⁴ Quoted from (Snell, Morris, & Bohlander, 2016), p.141

⁵ Source: (University of Baltimore, 2005) downloaded 9 Feb 2018 11:22 AM

THE FUNCTIONS

You can differentiate between **main functions** (called 'essential' in the following example), i.e. tasks and duties that are critical to perform the job, and **additional functions** ('marginal'), which are less critical. Please label them accordingly.

Please determine an accurate percentage of time that the job incumbent will spend on that particular task over the course of a working year/total working time.

In general, the job description comprises four to eight main functions, beginning with the most time-intensive and ending with the least time-intensive (the total percentage should add up to at least 95 %, but no more than 100%). The remaining time will be spent on additional functions. Figure 3.4 provides an example of describing the main functions and allocating the time requirements as a percentage.

→ Please refer to Annex 6.3 for a list of suggested verbs for task statements.

Core Functions/Duties: List 4-6 Core Functions of the position beginning with the largest percentage and ending with the smallest (to total 100%). List the associated Duties and Responsibilities under each function.

% of Time	E – Essential		Core Functions/Duties
	M - Marginal		
50%	E		Core Function: Survey Projects Duties/Responsibilities: -Analyze a wide variety of survey projects and other institutional studies which may contribute directly to major campus objectives. -Design and /or conduct all phases of survey research. -Identify data sources and review literature. -Develop survey questions and design samples. -Coordinate and supervise survey production and implementation - both web and paper based. -Maintain and analyze survey data using a variety of statistical and database software. -Provide written and oral reports with conclusions, implications and recommendations. -Coordinate and provide student survey samples for local internal and external surveys. -Consult with and advise other campus units that are conducting survey research.
30%	E		Core Function: Institutional Studies Duties/Responsibilities: -Provide ad hoc reporting and analytical support to decision making bodies. -Use appropriate and multiple methods to collect information. -Analyze student and other data from campus reporting databases.
10%	E		Core Function: Project Analysis and Planning Duties/Responsibilities: -Participate in the analysis and identification of current and future information needs. -Identify data requirements action needs for admissions, enrollment, budget and academic planning. -Identify data requirements and resources, assuring the validity and quality of campus data. -Develop analysis methodology and reporting formats. -Respond to requests for information from external and campus audiences as needed. -Assist the Director in a coordinating role with institutional Research projects. -Provide direction and act as a resource to other units.
10%	E		Core Function: Reporting Standards Duties/Responsibilities: -Stay informed and up-to-date on all new and evolving standards. -Share reporting standards with other campus units to promote consistency in reporting. -Ensure research and reporting standards are in place and updated regularly.
	E		Core Function: Duties/Responsibilities:

Figure 3.4: Example for job description and time allocation in %⁶

→ Additional and useful information can be found on the websites of (O*NET) and (DISCO).



3.2.2 JOB SPECIFICATIONS

The job specification is a document that contains the minimum acceptable qualifications and competencies needed by the person who is to perform the job. This means that a job incumbent performs the tasks and responsibilities successfully if they possess certain qualifications and competencies.

Job specifications can be difficult to write as the job analyst has to investigate a great deal and requires a good understanding of the qualifications and competencies needed to perform the various jobs.

A typical job specification consists of two areas: firstly, the competencies required to perform the job, and secondly, the physical demands the job places on the respective employee. Some organisations use the concept of qualification, which describes only knowledge and skills, but in our context we use the concept of competencies. Competencies are “an interrelated cluster of knowledge, skills and abilities needed by an individual, team, or organisation for effective performance”⁷.

Competencies can be described as the “**ability to act independently and creatively in a new, open situation**”⁸. The job incumbent can adapt to changing situations and orchestrate and apply his/her knowledge, skills, and abilities to perform the work successfully in different situations. They can adjust their behaviour if and as needed, and perform successfully by making their own decisions. They also consider their individual motivation, emotions and values, as well as the organisation’s values, rules and norms.

Values are the core (or key) aspect of competencies⁹.

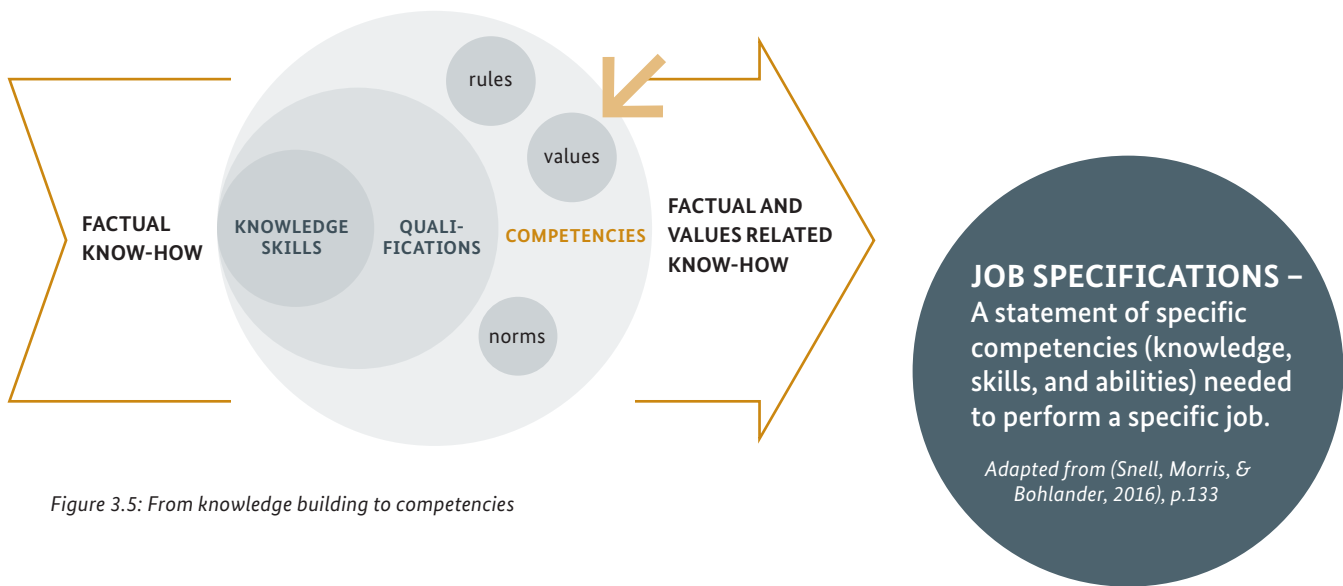


Figure 3.5: From knowledge building to competencies

For example, the ability of a Customer Service Assistant to communicate effectively with different clients is a competency. This is based on his/her individual knowledge of language, practical IT skills, and attitudes towards those with whom he or she is communicating. Nevertheless, all communication complies with organisation rules to perform the task; for example, asking a customer to pay the bill according to the organisation’s policies.

When generating the job specification, please describe the requirements for the future and present tasks by using the following four key competencies (see Table 3). Each represents a framework that addresses different features.

⁷ Source: (Slocum & Hellriegel, 2011), p.8

⁸ Translated from (Heyse & Erpenbeck, 2009), p.XII

⁹ Translated from (Erpenbeck & Sauter, 2015), p.15; illustration translated from (Erpenbeck & Sauter, 2015), p.1

PROFESSIONAL COMPETENCIES	METHODOLOGICAL COMPETENCIES
<p>THE PERSON'S PROFESSIONAL PROFICIENCY, E.G.:</p> <ul style="list-style-type: none"> • technical skills and knowledge of terms, production technology, processes and procedures; sector know-how • ability to combine industry and inter-disciplinary knowledge, and to deepen, examine critically and apply it in contexts of action <p>The person can link and deepen acquired knowledge and skills, reflect them critically, use them in other work-related tasks, and solve problems independently in a professional and technical context.</p>	<p>THE PERSON'S TECHNICAL PROFICIENCY E.G.:</p> <ul style="list-style-type: none"> • ability to acquire and process information (IT, project management, diagnostic tests and procedures) in complex working processes • ability to evaluate activities and deduce consequences for future action <p>The person obtains, processes and collects the presented information and professional/technical know-how, and can solve problems using the respective techniques and by designing and implementing problem-solving processes.</p>
<p>EXAMPLES OF FEATURES:</p> <ul style="list-style-type: none"> • production planning and control • controlling and regulation techniques • product and material know-how • knowledge of diesel engines 	<p>EXAMPLES OF FEATURES:</p> <ul style="list-style-type: none"> • conducting purchase and sales discussions • steering and facilitating meetings • presentation techniques • time management, e.g. planning and scheduling appointments
SOCIAL COMPETENCIES	PERSONAL COMPETENCIES
<p>The person's social proficiency, e.g.:</p> <ul style="list-style-type: none"> • ability to work and interact effectively with different people • ability to work together with supervisors, staff members, colleagues, clients and subcontractors while maintaining a positive working atmosphere. 	<p>The person's personal proficiency, e.g.:</p> <ul style="list-style-type: none"> • ability to assess and reflect upon oneself • ability to learn and to develop oneself.
<p>FOR EXAMPLE:</p> <ul style="list-style-type: none"> • ability to motivate, ability to convince • ability to deal with conflicts • conversation skills and communication • team player 	<p>FOR EXAMPLE:</p> <ul style="list-style-type: none"> • willingness to perform • self-confident appearance • ability to improvise • personal stability

Table 3: Description of the four competencies and examples of features



IT IS GENERALLY ADVISABLE TO USE 15 KEY FEATURES WITHIN THE FRAMEWORK OF THE FOUR COMPETENCIES.

FOR EXAMPLE:

four key features for a human resource assistant are:

- knowledge of the principles of employee selection: professional competency
- project management: methodological competency
- conflict resolution skills: social competency
- psychological resilience: personal competency

→ Annex 6.4 contains more examples of features for all four competencies. Please contact WAJ or GIZ to receive more information about the weighting of each competency related to the tasks (Annex V.a).

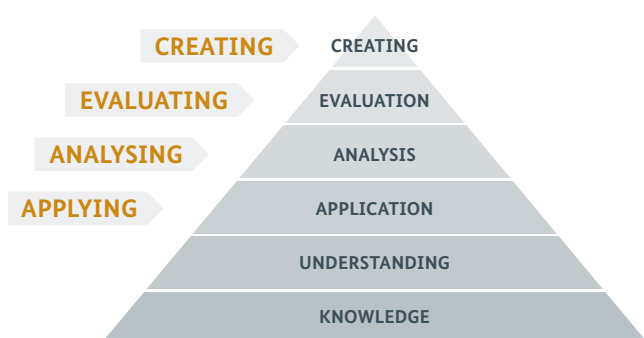
Besides identifying the features, it is essential to define the behavioural levels – e.g. level 3 = works independently, etc. – required to perform a job successfully.

TTI initially decided to use three different levels, expressed as excellent, good, and fair. In the course of the first pilot it became clear that a fourth level was necessary and the level 'weak' was added (this is used only for the actual profile).

LEVEL	DESCRIPTION	DETAILS
4	Excellent degree of performance	Works independently and solves problems creatively (creating and evaluating level)
3	Good degree of performance	Works independently (analysing level)
2	Fair degree of performance	Works with guidance (applying level)
1	Weak degree of performance	Competency is insufficient

Table 4: The four levels of target profile competencies

Each level should be described observably or measurably, so that everyone has the same understanding of the levels, and using verbs like apply, analyse, evaluate and create, as the job incumbents are expected to do something with their knowledge¹⁰.



The job incumbents orchestrate and apply their knowledge, skills and abilities to handle new and open situations successfully. In other words, 'competencies' describes the ability/capability of a person to act and work with the learned knowledge¹¹. They represent the combination of knowledge, skills, values and rules that enable the performance of particular tasks.

Competent persons are those who can perform required actions on the basis of their knowledge, skills, abilities, and values. The competency concept emphasises, in particular, dealing with requirements and situations that demand non-standardised actions and problem-solving¹².

Figure 3.6: Bloom's Taxonomy and the verbs describing observable action

Table 5 provides descriptions and examples of applying, analysing, evaluating and creating:

LEVELS	DESCRIPTION	EXAMPLES
Applying level	<ul style="list-style-type: none"> ... using skills and knowledge to accomplish a task that does not require analysis, evaluation or creation ... following prescribed steps. <p>There is generally a right/wrong way to perform, with little critical thinking involved</p>	<ul style="list-style-type: none"> speaking clearly and audibly applying a service mindset in own work
Analysing level	<ul style="list-style-type: none"> ... comparing and contrasting, breaking a concept into components, showing relationships, recognising assumptions, logical reasoning ... looking at the parts of the whole, how they are connected, and how changes in one part affect the others 	<ul style="list-style-type: none"> speaking clearly and conveying different messages effectively classifying all those to whom services are provided as 'clients' and seeking to see things from the client's point of view
Evaluating level	<ul style="list-style-type: none"> ... determining values, making judgements, criticising, assessing complex ideas to make decisions and support views 	<ul style="list-style-type: none"> speaking clearly and having a good command of the language assessing own and team performance against client service quality standards
Creating level	<ul style="list-style-type: none"> ... combining elements to plan and form something new ... considering who, what, where, when, and/or how to create a unique product/process 	<ul style="list-style-type: none"> having a fluent and engaging conversational style using multiple speech techniques establishing a service mindset throughout the organisation, so that staff consider everyone they interact with at work as clients

Table 5: Advice on how to phrase competencies for the applying, analysing, evaluating and creating levels

¹⁰ Source: (Schullo A., February 27, 2015) and (Schullo A., 2018)

¹¹ Translated from Studienseminar für das Lehramt an berufsbildenden Schulen Trier (Berufsbildende Schule (BBS) Trier)

¹² Translated from Bundesinstitut für Berufliche Bildung (Bundesinstitut für Berufliche Bildung) downloaded 5 Mar 2018

Competencies begin with a present tense action verb (see Annex 6.5). Each verb requires an object (see Table 2). The competencies should be measurable and observable, and are based on performance.

For example: Evaluate recruiting methods from an economic perspective by comparing and contrasting different modern recruitment methods (e.g. business networks or hackathons).

Competencies do not include judgmental or relative adjectives (e.g. good), judgmental or relative adverbs (e.g. immediately) or qualifying phrases (e.g. write with greater confidence)¹³.

To finalise step two, you need to summarise and analyse the information gained from the different sources, such as interviews, workshops and questionnaires. Please bear in mind that the target profile describes the competencies an ideal employee must have (at the respective level) in order to perform present and future tasks.

To achieve this for the specific job, you need to summarise the information about future tasks, e.g. by analysing the organisation's strategy (see Chapter 3.1) and the related requirements, as well as the information about present tasks and the related requirements on their respective performance level.

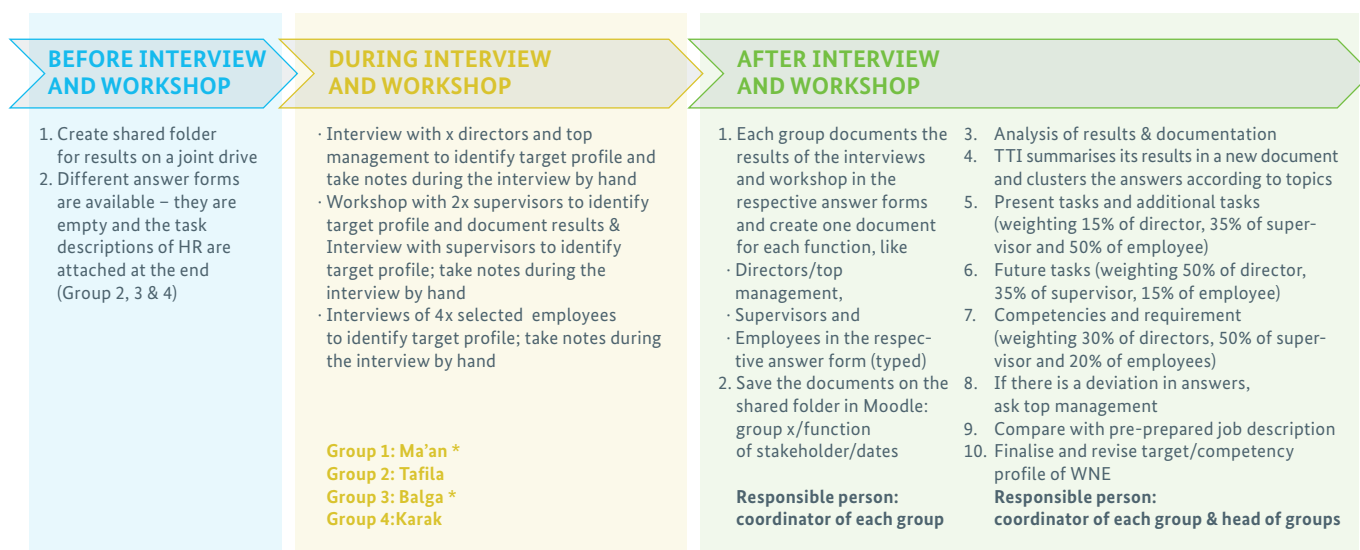


Figure 3.7: Plan to elaborate the target profile

Figure 3.7 describes TTI's plan to elaborate the target profile. The process starts by preparing for data collection, continues by collecting and analysing the data, and ends by finalising the target profile.

Figure 3.7 shows, among others, to what extent the answers of different stakeholders were taken into consideration for the target profile. For example, future tasks were primarily identified by the directors (using 50% of

directors' answers), partially by the supervisors (using 35% of supervisors' answers), and only to a small extent by the employees (using 15% of employee answers).

The weighting considers who has more information about the respective part; for instance, as directors know more about the strategic development of the organisation their answers are more significant for the future tasks. Employees know more about their current tasks.

TARGET PROFILE	WEIGHTING FACTOR OF ANSWERS	
Current tasks and additional tasks	15% director 35% supervisor 50% employee	
Future tasks	50% director 35% supervisor 15% employee	50 – 100% benchmarking partners
Level of competencies and requirements	30% director 50% supervisor 20% employee	

Table 6: Weighting factors to generate the target profile

¹³ Source: (School of Public Health/University of Texas, 2018)

3.3. Identifying the Actual Profile

➔ **THE THIRD STEP OF A TNA IDENTIFIES THE ACTUAL PROFILE (E.G. EXPERIENCE, LEVEL OF COMPETENCIES) OF THE RESPECTIVE JOB INCUMBENTS.**

The analysis can be done either by the supervisors (external assessment) and/or the incumbents themselves (self-assessment), or through an analysis of documents (personal files, certificates, etc.).

Analysing documents does not always provide what was looked for. Many competencies are not documented in certificates as they were learned on the job, and company-specific knowledge is nowadays more important than knowledge formally gained at a university.

TTI recommends using a supervisor interview and an employee questionnaire (see Chapter 4) to analyse the actual profile.

As it is recommended and proven that different sources should be used to identify the actual profile, TTI decided to summarise the supervisors' evaluation and the self-evaluation using the weighting factors shown below:

ACTUAL PROFILE	WEIGHTING FACTOR OF ANSWERS
Level of competencies and requirements	60% supervisor 40% employee

Table 7: Weighting factors to generate the actual profile

The actual profile is geared to the target profile – the identified competencies are used, but the level will be analysed individually for each incumbent.

Contrary to the target profile, which lists the level of the competencies of an ideal candidate, the actual profile lists the level of competencies that a real person currently has. Based on the experience of the first pilot, TTI described the criteria for the actual profile as excellent, good, fair and weak (see Chapter 3.2.2.).



LEVEL	DESCRIPTION	DETAILS
4	Excellent degree of performance required	Works independently and solves problems creatively (creating and evaluating level)
3	Good degree of performance required	Works independently (analysing level)
2	Fair degree of performance required	Works with guidance (applying level)
1	Weak degree of performance	Competency not sufficiently available

Table 8: The four levels of actual profile competencies

3.4. Gap Analysis and Competency Matrix

→ **THE FOURTH STEP OF A TNA COMPARES THE TARGET AND ACTUAL PROFILE OF EACH JOB INCUMBENT.**
 It is important to analyse the gap carefully and to identify the real problem ('cause') of, for instance, low performance. This is key to developing and implementing appropriate and corrective measures ('cure') in order to fill the gap.

PURPOSE OF THE FOURTH STEP:
 What is the difference between the required and the current competencies?

The data of gained information are documented in a competency matrix.

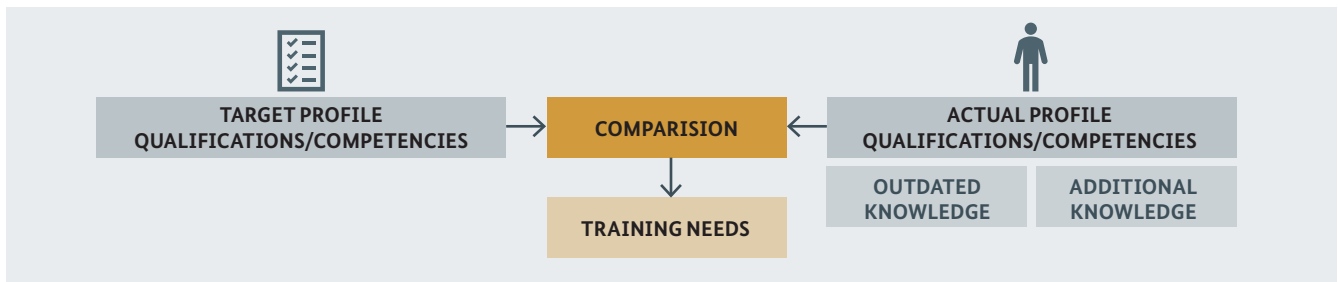


Figure 3.8: Gap analysis of the target and actual profiles

The competency matrix (gap analysis) is an MS Excel template which is available from WAJ and GIZ (see also Annex V.b). Figure 3.9 shows the structure of a competency matrix.

- The first row names the categories: professional, methodological, social and personal. All four competencies represent frameworks that comprise different features.
- The third row shows the target profile and the required level of the competency's feature.
- Each of the subsequent rows is dedicated to one job incumbent. Each row begins with the name, and documents the present level within the competency feature.
- The discrepancies are highlighted.

	Professional competencies				Methodical competencies				Social competencies				Personal competencies			
					Time management	Moderation			Team discussion				punctuality			
Target profile					3	3			2				1			
Mourrad					2				2							
Aisha						1										
...																

■ sufficient degree of performance

■ divergent degree of performance

Figure 3.9: Competency Matrix

→ Please contact WAJ or GIZ if you require a more detailed explanation of the different TNA steps (see also Annex V.a) and the templates (Annex V.b). All the templates can be used and adapted for new TNA processes.

3.5. Training Identification and Training Plan

→ THE FIFTH STEP OF A TNA EXAMINES THE NEEDS FOR ACTION.

What are the current and future tasks, duties and responsibilities (using the findings from step one) and what is the required level of competencies to successfully perform the job today and in future in order to reach the goals of the organisation?

PURPOSE OF THE FIFTH STEP:
What are the needs for action?

First you need to find out whether:

- The level of competencies of the target profile is **the same as** the level of competencies in the actual profile.
- The level of competencies of the target profile is **higher than** the level of competencies in the actual profile.
- The level of competencies of the target profile is **lower than** the level of competencies in the actual profile.

After identifying the status quo, you need to analyse the level of competencies in terms of their importance and the type and size of the gap. This will help you to conclude the needs for action. The options for action can be geared to your staff members (training, learning on the job, rotation, development plans) or your organisation (restructuring of units, flexible working hours, organisational changes).

IMPORTANCE AND TOPICS

1. Address the most important and required competencies first, and develop them according to priority (e.g. derived from the organisation's strategy, for instance to introduce digital devices).
The less important competencies do not require as much attention.
2. Consider which gaps (**topic-wise**) can be closed by learning from others.
For example: monitoring resources and quality inspection can be learned on the job, supported by the supervisor or colleagues.
3. Consider which gaps can be closed through training.
For example: how to use IT software more efficiently has to be trained.

TYPE OF GAP

- If the level of the target profile is lower than the actual profile, you need to act in order to prevent the staff member feeling bored or underchallenged.
- If the level of the target profile is higher than the actual profile, you need to address the filling of the gaps according to their importance.

SIZE OF GAP

- It is easier to close smaller gaps than those that stretch across two or three levels.
- You can close one-level gaps by methods such as learning from others, learning along the job, or learning on the job.
- You can close two- or three-levels gaps with trainings such as learning off the job.

→ Please contact WAJ or GIZ to receive a detailed description of the different TNA steps (see also [Annex V.a](#)). All the templates in [Annex V.b](#) can be used and adapted for new TNA processes.

Priority	Competency field	Topic	Objective of the training	Function	Who needs training? Name of employee	Identified gap
	Professional competency	Technical specific specification for pipes	<ul style="list-style-type: none"> Ready to design ... Is able to select Is able to categorise Is able to calculate ... 	WNE	Abdullah	1
	Social competency		<ul style="list-style-type: none"> Know and use different channels of communication Identify and practice verbal and non-verbal communication Effective communication with colleagues 	WNE	Mohamed	2

Figure 3.10: Excerpt from the Training Plan

While working on the template, TTI decided to split this frame into two templates, namely the Training Plan and Training Activities.

Competency priority	Competency description	Topic related to competency	Employee function	Name of employee	Gap size	Gap priority	Required training	Status	Notes
9,15	To be aware of all work related legislations and laws (judicial control)	Judicial control course	Jabi	AAAA	3	64	Level 1 to 4	Expected by November 2018	
9,15	To be aware of all work related legislations and laws (judicial control)	Judicial control course	Jabi	BBBB	3	64	Level 1 to 4	Expected by November 2018	

Figure 3.11: Excerpt from the Training Plan

Ref.	Training category	Competency	Topics	Gap	Course level	Objectives	Training provider	Training duration (day of 6 hrs)	Training costs
24	Management	To be aware of all work related legislations and laws (judicial control)	Judicial control course	No gaps, considering development	Level 4	Train the employees to be fully aware of all work related to Judicial control	In house	3	254
				3 to 4	Level 3	Train the employees to be aware of most work related to Judicial control	In house	3	254
				2 to 4	Level 2	Train the employees to be familiar with work related to Judicial control	In house	3	254
				1 to 4	Level 1	Train the employees to have the main concepts of Judicial control	In house	3	254

Figure 3.12: Training Activities

Once the Training Plan has been generated, activities can be steered and trainings started. The learning objectives must be stated clearly and precisely in order to tailor trainings to concrete needs. Written learning objectives are important for the trainer in the design phase as they later provide a roadmap on how to deliver the training.

Learning objectives guide participants in their learning process and will enable them to cope with future situations. For the organisation, they ensure that the final measures will fill the gap and cure the performance problems.

→ Please contact WAJ or GIZ for the TNA step templates and training programme examples developed by WAJ (see also Annex 6.7, Template V.b and Tool V.c.). All the templates can be adapted for new TNA processes according to your needs.

The following section presents general guidelines for writing learning objectives by using some of the methods from Chapter 3.2.2.



3.5.1 LEARNING OBJECTIVES

Please adhere to the following guidelines when formulating learning objectives. Learning objectives should be described using the **SMART** criteria (**S**pecific, **M**easurable, **A**chievable, **R**ealistic and **T**ime-based (defined deadline), and follow the **ABCD** model and Bloom’s taxonomy. They should be clearly laid out and articulated.

For example:

“The HR assistant is to support a workforce growth of 10% over the next 12 months by recruiting new employees from the local community at an upcoming job trade fair.”

Learning objectives should be defined in three sections:

1. State the objective: “Upon completion of this activity, participants will be able to ...”.
The less important competencies do not require as much attention.
2. Add the action verb to describe an observable and measurable action.
3. End with the specifics of what the learner will be doing when demonstrating achievement or mastery of the objective.

Learning objectives should be structured according to the **ABCD** model, as shown in Table 9 below.

ABCD refers to the **A**udience (participants) of the training activity, the **B**ehaviour expected from the participants, the performance **C**onditions, and the expected **D**egree of performance.

AUDIENCE	BEHAVIOUR – A MEASURABLE VERB	CONDITIONS	DEGREE
Who are you addressing?	What is expected of the participants?	Under which circumstances is the behaviour to be performed?	How well must the behaviour be performed? To which level?
	One task of behaviour per verb	How the task or behaviour will be performed	How well the task or the behaviour must be performed to meet the standard
	Choose the verb that best describes the type of behaviour or task the participant must display after the training	Under which conditions will the task be performed	

Table 9: Structure of learning objectives according to the ABCD model

Describe what you want participants to be able to do as proof that they have learned.

- S** specific
- M** measurable
- A** achievable
- R** realistic
- T** timed-based (defined deadline)

Table 10 gives additional examples of the learning objectives using ABCD and Bloom’s taxonomy (see Chapter 3.3.2). Bloom’s taxonomy classifies educational learning objectives into levels of complexity and specificity. The original taxonomy from 1956 was revised in 2001 and now comprises: “Knowledge, Understanding, Application, Analysis, Evaluation, Creating”.

It is important to formulate objectives so that trainers and participants alike understand the purpose of the training. The trainer can use this framework to organise the objectives for the training. He/she can plan and deliver the training according to the learning objectives, select the appropriate instructions, and design the assessment tasks accordingly. The objectives are then clear to everyone, i.e. the trainer and the participants.

EXAMPLES USING BLOOM’S TAXONOMY AND THE ABCD MODEL ¹⁴:

Desired outcomes upon completion of the training:

	AUDIENCE	BEHAVIOUR – A MEASURABLE VERB	CONDITIONS	DEGREE
KNOWING	Employment Assistant	will be able to name	the different steps of a selection process	within 60 seconds.
UNDERSTANDING	Employment Assistant	will be able to explain	the new payment regulations	with his/her own words.
APPLYING	Employment Assistant	will be able to calculate	the cost of a selection process, using the new software XYZ	without error.
ANALYSING	Employment Assistant	will be able to differentiate	between communication tools	to address different stakeholders accordingly.
EVALUATING	Employment Assistant	will be able to design	integrated HR services using innovative practices	within the existing budget frame.
CREATING	Employment Assistant	will be able to create	recruitment processes to attract highly demanded specialists for the organisation	within the month of XY.

Table 10: Examples of learning objectives using Bloom’s taxonomy and the ABCD model

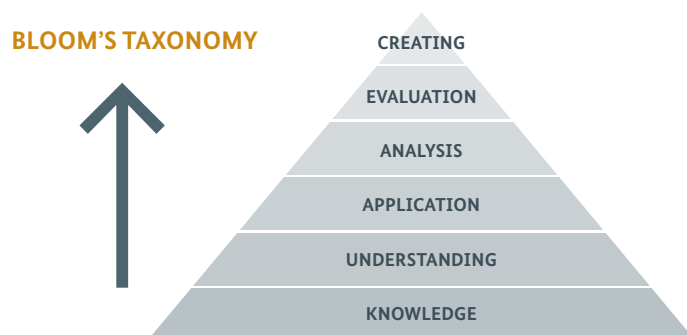


Figure 3.13: Bloom’s Taxonomy and increasing specificity

¹⁴ For further details see: (Faculty of Maryland) downloaded 21 Feb 2018 and in (Armstrong) downloaded 6 Mar 2018

→ **ANNEX 6.5 PROVIDES SOME ACTION VERBS FOR USE ON THE SIX LEVELS.**

To finalise step five, you can write the training plan and begin with training or development activities. Not all of them cost a lot of money, as learning 'on the job' from other colleagues is sustainable and easy to organise.

The success of the training and development activities can be evaluated directly after the training or, even better, after a certain working period.

The whole TNA process can be evaluated directly after the different steps by speaking to the respective stakeholders. You can ask the supervisor whether the performance of the job incumbent has improved or he/she is more motivated since the TNA process. You can also ask the employees themselves whether they can use what they have learned and apply it in everyday work, or whether their ideas have been considered.



4. Instruments for Collecting Information



GUIDELINES FOR THEIR USE

In the course of the TNA, **different instruments can be used to collect data on the target and/or actual profile.** TTI decided to use interviews, questionnaires and workshops and, in some cases, benchmarking. You can optimise the process by using different instruments. Regardless of the method, it is important to make sure that it is reliable, valid and trustworthy.



4.1. Interview

→ DURING THE THREE PILOT PROJECTS, TTI HELD INTERVIEWS WITH DIRECTORS, SUPERVISORS¹⁵, AND SELECTED EMPLOYEES.

A semi-structured interview with open and closed questions was chosen. Open questions were mainly used to enquire about tasks, duties, etc. Closed questions, which were pre-phrased, were used to ask about the competency levels.

TTI DEVELOPED THESE QUESTIONS AND IT WAS POINTED OUT TO THEM THAT A SUCCESSFUL INTERVIEWER SHOULD BE:

- *Knowledgeable*
thoroughly familiar with the TNA process and the concept of competencies
- *Clear*
ask simple, easy, short questions; no slang
- *Gentle*
let people finish; give them time to think; tolerate pauses
- *Sensitive*
listen attentively to what is said and how it is said;
be empathetic in dealing with the interviewee
- *Open*
respond to what is important to the interviewee and be flexible
- *Steering*
convey the purpose for interview; round it off;
ask whether the interviewee has questions
- *Critical*
be prepared to challenge what is said, for example, deal with inconsistencies in interviewee replies
- *Remembering*
relate to what has previously been said
- *Interpreting*
clarify and extend meanings of the interviewee statements,
but do not impose on them
- *Balanced*
do not talk too much, which would make the interviewee passive,
and do not talk too little, which could result in the interviewee feeling that he/she is the only one doing the talking
- *Ethically sensitive*
be sensitive to the ethical dimension of interviewing;
ensure the interviewee appreciates what the analysis is about, its purposes,
and that all answers will be treated confidentially

¹⁵ Only selected supervisors and employees were interviewed for the target profile, while all supervisors with management responsibility were interviewed for the actual profile.

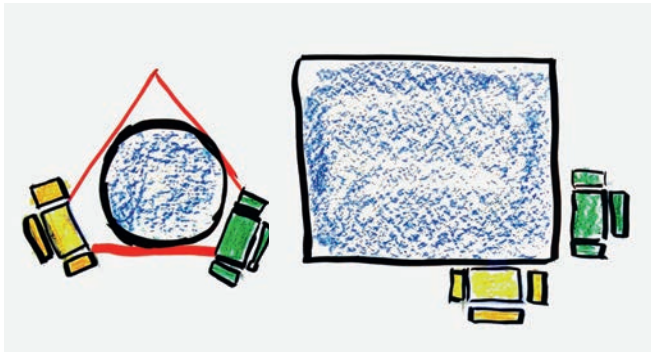


Figure 4.1: Arrangement of chairs to create a cooperative atmosphere (workshop drawing)

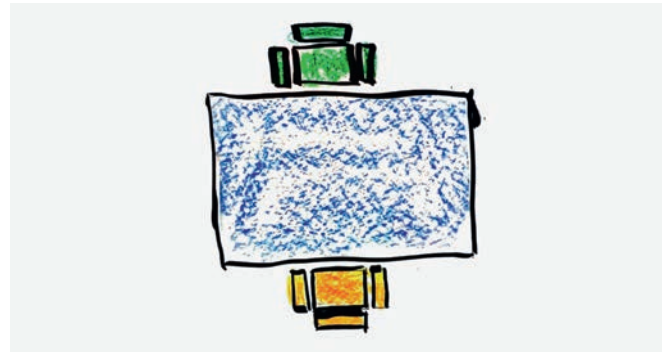


Figure 4.2: Arrangement if time is limited (workshop drawing)

➔ **ALL INTERVIEWS CONSIST OF THREE PHASES:
A PREPARATION AND BEGINNING PHASE,
A CENTRAL PART,
AND AN ENDING, ANALYSIS AND DOCUMENTATION PHASE.**

Before you start an interview, consider the seating arrangement so as to create a cooperative atmosphere.

If you are sitting at a round table, place the chairs as if they are on two of the corners of a triangle, and if you are at a rectangular table, sit in a right angle to the interviewee (arrange the seating accordingly if more than one person is interviewing).

Please make sure that everyone feels comfortable with the seating arrangement.

Before you start, make sure you have all the necessary information about the interviewee, his/her working place, the manager-to-staff ratio, and the location, local circumstances, etc.

Start your interview by creating a good atmosphere according to the cultural circumstances. Then explain the purpose of your visit, the structure of the interview, the TNA, and the concept of competencies.



Figure 4.3: Tips for the interviewer (workshop drawing)

PLEASE CONSIDER:

- ➔ Social skills – empathy, warmth, attentiveness, humour (where appropriate) – are essential for good interviewing.
- ➔ Any judgmental attitudes, shock or discomfort from your side will be immediately detected by the interviewee.
- ➔ Never answer a question for the interviewee.
- ➔ You must be completely engaged with the interviewee, while at the same time keeping track of the questions you need to ask.

Please use active listening techniques:

- ➔ Repeating back
- ➔ “Wow!”
- ➔ “Tell me more about that!”
- ➔ “That is really interesting.”

Annexes 6.6.2, 6.6.3, 6.6.4, and 6.6.5 contain examples of the interview templates. All the interview templates are available from WAJ and GIZ (see also [Annex II.a](#), [II.b](#), [II.c](#), [II.d](#), [III.a](#), [III.c](#)) and can be adapted to your needs.

If possible, interview in a team of two or three. You can distribute the roles before the interview starts; for instance, one person asks the questions while the other takes notes, or one asks questions related to tasks and the other about competencies.

After the central part of the interview, where you will talk about tasks, future developments, etc., you need to find a suitable ending.

PLEASE DOCUMENT THE ANSWERS BY CREATING SIMPLE RULES FOR TRANSCRIPTION, SUCH AS:

- Transcribe literally, not as a summary.
- Mark the breaks with three full stops within brackets (...).
- Capitalise particularly stressed words or comments.
- Document emotional non-verbal expressions of the interviewee (such as laughing or sighing).
- If you do not understand something, ask for clarification. In such cases, please note your questions in brackets.
- Name the typed transcript after the person/title, and save and archive it.

- In general, the interview answers should be structured (using a coding system such as topics, themes), analysed, summarised and reflected upon. Depending on the purpose, you can elaborate the target profile or the actual profile of the job incumbent.

4.2. Questionnaire

- **DURING THE THREE PILOT PROJECTS, TTI USED QUESTIONNAIRES FOR ANALYSING THE SELF-ASSESSMENT OF THE EMPLOYEES.**
Questionnaires should be used in a formal session.

This awareness-fostering session has to be prepared by analysing the local situation and circumstances, and organising the necessary information material. The session starts with a presentation of the TNA process, an explanation of why the process is conducted, and what it means for the employee.

The questionnaire sessions and interviews (see [Chapter 4.1](#)) need to be prepared carefully in advance and should contain information about the field visit, the TNA process, the concept of competencies, and explanations about possible changes related to the respective job.

- Please contact WAJ or GIZ to receive the relevant information and tools (see also [Annex IV.e](#), [IV.a](#), [IV.b](#), [IV.c](#) and [IV.d](#)).

Please make sure to explain everything very clearly so that the employee fully understands the whole procedure and you will not inadvertently create any misunderstandings or raise suspicions. It is important to dispel any possible fear of changes.

The questionnaire template (see [Annex 6.6.5](#)) contains closed questions which can be answered by choosing a given option: 1, 2, 3 or 4. There are also open questions, which employees can answer with their own words. The template is available from WAJ and GIZ (see also [Annex III.b](#)) and can be adapted to your needs.

You should organise questionnaire sessions in teams, as it is good to distribute roles. It is advisable to distribute the roles before the session starts: for instance, one person explains and answers questions about the TNA process and another explains and answers questions about competencies.

The questionnaire should be filled out by the employees successively and simultaneously with the explanations. This is important to avoid any misunderstandings or false interpretations of the questions.

After the session, collect all the questionnaires, and enter the answers of the closed and open answers into the system. Name each file after the person/title, and save and archive it.

4.3. Workshop

→ **DURING THE THREE PILOT PROJECTS, TTI HELD WORKSHOPS FOR SUPERVISORS AND DIRECTORS TO ANALYSE PRESENT AND FUTURE TASKS AND IDENTIFY THE CORRESPONDING COMPETENCIES.**

Workshops have two major advantages. They offer the most intensive possibility for direct exchange between various persons or groups within a relatively short time, and they combine different and often creative methods (such as role plays, mind mapping, etc.) for analysing situations.

You will need to prepare the workshop in advance. A recommended agenda and invitation letters are available from WAJ and GIZ (see also [II.e](#) and [IV.f](#)). All the templates can be adapted for new TNA processes.

Once you have explained the workshop agenda and the roles and responsibilities of the participants and workshop facilitator, give an introduction of the TNA and the concept of competencies, then move on to analysing the present and future tasks.

The participants should identify the tasks in groups and present a summary to everyone. This is followed by a brainstorming session to identify the corresponding competencies.

The participants should describe the competencies, experiences, etc., individually. This exercise addresses the working conditions, safety tools, qualifications, experiences, language and competencies needed to perform the tasks, duties and responsibilities of a given job successfully.

The results of the individual analyses will be presented to the other participants in a 'gallery walk'.

At the end of the workshop, the participants should work in groups to agree on tasks, etc., and to approve the target profile in a joint session.

You should document the results of the workshop, evaluate the cooperation of the participants, and reflect on the work processes to be considered in future.

4.4. Observation

→ DURING THE THREE PILOT PROJECTS, TTI DID NOT USE OBSERVATION, BECAUSE IT IS VERY TIME-CONSUMING, BUT CONSIDERS IT AN IMPORTANT INSTRUMENT AS IT CAN BE A GOOD SOURCE OF INFORMATION.

Simple forms of observation provide first-hand information, allowing you to identify reasons for problems that cannot be solved with training. You can see the work environment, the tools and equipment in use, the interrelationships between the workers, and get an idea of the complexity of the job.

Observation is useful for manual and psychomotor tasks, but not for observing intellectual efforts or concentration.

Observation is an ideal instrument to verify data gained from other sources.

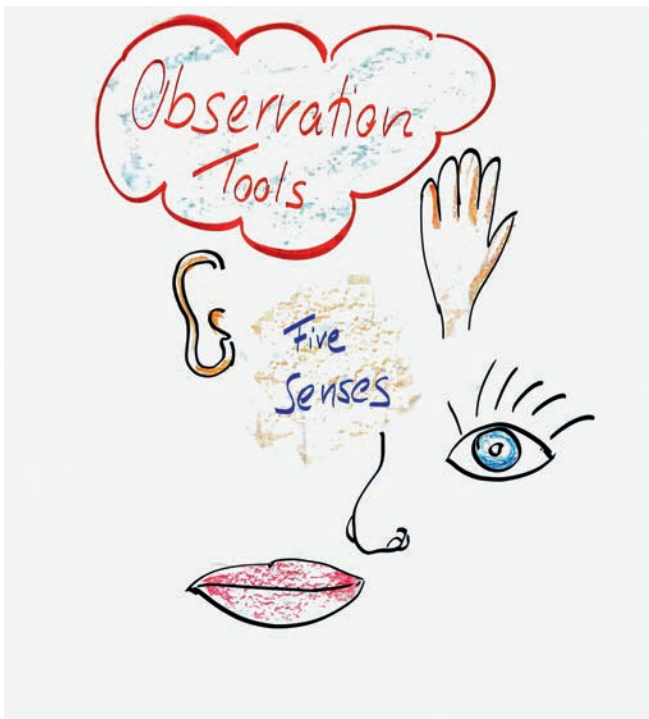


Figure 4.4: Tools for observation (workshop drawing)



Figure 4.5: Tips for observing (workshop drawing)

IF YOU OBSERVE, PLEASE CONSIDER THE FOLLOWING (SEE ALSO FIGURE 4.5):

The observer has to:

- create a trusting atmosphere between him/herself and the observed person by explaining the duty of confidentiality
- introduce him/herself to the job incumbent
- inform the job incumbent about the purpose of the observation
- behave correctly and respectfully towards the job incumbent and all other persons in the field
- give feedback to employees
- know the field, or at least be prepared for the circumstances at the workplace, location, etc.
- turn off his/her mobile phone
- thank the job incumbent for allowing them to observe, and answer any questions the incumbent may ask.

4.5. Benchmarking

→ **IN ONE OF THE THREE PILOT PROJECTS, TTI USED BENCHMARKING TO ANALYSE FUTURE TASKS.**

The benchmarking process usually includes different steps¹⁶:

- I. Clearly identifying the job you want to benchmark and establishing a project team that will conduct the research.
- II. Selecting benchmarking partners, such as different relevant organisations, firms, specific experts, etc. The selection criteria could be that they are trendsetters, or companies with more experience in the respective field, or other specialists.
- III. Determining the necessary data through interviews and observation.
- IV. Analysing and interpreting the gained data.
- V. At the end of the benchmarking process, sharing the information and the results.

→ For new TNA processes, you can adapt the benchmarking interview template available from WAJ and GIZ (see also II.d).

¹⁶ Revised source: (Bratton & Gold, 2007), p.544





INTERVIEWS

- **UNSTRUCTURED INTERVIEW:**
Interview in which the interviewer asks unformatted questions. The process is not pre-planned and very flexible.
- **SEMI-STRUCTURED INTERVIEW:**
Interview in which the interviewer asks focused questions about the major topics, and some semi-structured questions. The process is pre-planned and has some flexibility.
- **STRUCTURED INTERVIEW:**
Interview in which the interviewer asks the same series of pre-determined questions. The process is pre-planned and inflexible.



QUESTIONNAIRE

List of open or closed questions posed to the job incumbent, and designed to extract specific information. Basic purposes:

- to collect the appropriate data
 - to make data comparable and amenable to analysis
 - to minimise bias in formulating and asking questions
 - to make questions engaging and varied.
- **OPEN QUESTIONS:**
are used to draw the candidate out – begin with what, why, when, who ... tell me about ...?
 - **CLOSED QUESTIONS:**
are used to clarify a point of fact and often only require a short or single-word answer: yes / no, or 1, 2, 3, 4, etc.



BENCHMARKING

Describes the features of an organisation's job, etc., and compares it with the job of competitors. The objectives of benchmarking are:

- to determine what and where you can improve your job
- to analyse how other organisations structure the job to work efficiently
- to use this information to shape your job.

5. Planning the TNA

WHEN STARTING THE TNA PROCESS IT IS IMPORTANT TO TAKE A MOMENT TO REFLECT ON THE KIND OF JOB YOU WILL ANALYSE.

There may be different options, such as:

- ➔ a revised job description (slight changes)
- ➔ a changed job description (significant changes)
- ➔ a newly created job description.

You need to choose the different instruments, involve the various stakeholders, and prepare the information material accordingly.



CHANGES	INSTRUMENTS & INFORMATION	INVOLVED STAKEHOLDERS
Slightly revised jobs	<ul style="list-style-type: none"> • Instruments: interviews, workshops, questionnaires • Information material for all stakeholders about TNA and competencies 	Within WAJ: top management, directors, supervisors, employees
Significantly changed jobs	<ul style="list-style-type: none"> • Instruments: interviews, workshops, questionnaires • Information material about the TNA, competencies, and about managing changes (changed tasks may cause alarm) 	Within WAJ: top management, directors, supervisors, employees
Newly created jobs	<ul style="list-style-type: none"> • Instruments: interviews, workshops, questionnaires, benchmarking, observation • Information material about the TNA, competencies, and about managing changes (restructuring may cause alarm) 	Within WAJ: top management, directors, supervisors, employees Outside WAJ: stakeholders from other organisations, specialists, etc.

Table 11: Job description changes, instruments, involved stakeholders



AFTER YOU HAVE TAKEN THE ABOVE DECISIONS, START TO PLAN ‘WHO WILL DO WHAT BY WHEN’ IN YOUR TNA PROCESS.

Figure 5.1 describes this process, using different colours for the three parts:

- I. Start with the old job description, revise it according to the new developments, and determine the requirements (in blue).
- II. Start the process of analysing the target profile (in green).
- III. Analyse the actual profiles of all job incumbents (in yellow).

Figure 5.1 proposes a tentative timeframe; please feel free to re-schedule it according to your needs.



→ Please contact WAJ or GIZ to receive the planning template (see also VI), and adapt it to your specific situation.

DRAFT COMPETENCIES AND PREPARATION OF JOB X			TARGET PROFILE				
Who?	What?	When?	Who?	What?	When?	Who?	What?
Names	Draft job description (tasks, etc.) and draft competencies profile	By end of week 1	Names	Prepare workshop for directors & supervisors	Prepare workshop for directors & supervisors	All	Conduct workshop
All	Discuss, add and finalise draft of competencies	By end of week 2	Names	Prepare guideline for 'sample' employees	Prepare guideline for 'sample' employees	All	Conduct interviews for 'sample' employees
Group leader	Inform all stakeholders	Beginning of week 1	Names	Prepare interview guideline for selected supervisors	Prepare interview guideline for selected supervisors	All	Conduct interviews for selected supervisors
			Names	Prepare answer form in MS-Excel	Prepare answer form in MS-Excel	All	In specific cases: conduct benchmarking
			Names	In specific cases: start benchmarking process	In specific cases: start benchmarking process		

Figure 5.1: Planning the TNA process

As the table above depicts a former pilot TNA process, the names (**who**) have been substituted. The **what** remained and the dates (**when**) were changed into weeks with numbers; beginning with week 1. Please read the table from left to right.

WE RECOMMEND WORKING ON THE TNA PROCESS IN A TEAM.

During the pilot phase, TTI worked in groups consisting of experts from administration, engineering and HR. This approach proved successful and important, and showed that subject matter experts and HR can complement each other.

In future, it is intended to shift the whole process to the supervisors and HR (see [Chapter 2](#)). They should work together to update the job description, renew the requirements, assess the actual profile of their staff, and evaluate the practical implementation of what was learned in the training.

It is very important to inform the relevant stakeholders about the TNA process, schedules, etc., at an early stage of the planning phase.

→ Please contact WAJ or GIZ to receive examples of invitation letters (see also [IV.e](#)), presentations ([IV.a](#), [IV.b](#) and [IV.c](#)), and information material such as the elevator pitch ([IV.d](#)).

TTI decided to approach only a 'sample size' of supervisors and employees (10 – 20% employees) from all directorates for the target profile. The selection criteria for both groups was 'advanced know-how'. The supervisors and directors were invited to a workshop. All employees and their supervisors were involved in elaborating the actual profile.

Management support is crucial, as the managers have to be involved in allowing employees to take part in the training and subsequently transfer and use what they have learned.

You should also consider the feasibility of the process with respect to timing and availability of the respective stakeholders.

				ACTUAL PROFILE					
When?	Who?	What?	When?	Who?	What?	When?	Who?	What?	When?
By end of week 4	Names	Finalise target profile	By end of week 7	Names	Prepare question-naire for employees	By end of week 7	All	Hold information meeting; distribute questionnaires	By end of week 9
By end of week 5	Names	Update job description in database	By end of week 8	Names	Prepare interview guideline for supervisors	By end of week 7	All	Conduct inter-views with super- visors	By end of week 9
By end of week 5							Names	Document actual profile in compe- tency matrix	By end of week 11
By end of week 5							Names	Finalise the training plan for job X	By end of week 14

5.1. TTI Tips



INSTRUMENT:

Select the correct instrument:

- Choose suitable instruments to determine training needs – incorrect instruments result in misleading needs.
- Pay attention to clear, specific and comprehensive questions when designing the questionnaire.
- Workshops present a major opportunity for brainstorming.



COMMUNICATION SKILLS:

- Control your body language and observe the body language of others during interviews.
- Having informal conversations with employees helps to explore their performance deficiencies more easily.
- Communication skills are essential for success when gathering information.



PROCESS:

- Before starting the TNA process, it is essential to map the data sources.
- A detailed and in-depth analysis will lead to more accurate and specific training needs.
- Analyse subjectively and objectively from analysis to results.
- Aim to convince employees that the questionnaire is not an evaluation process (to convey the real message of the purpose of the analysis).
- Detailed training plans provide multiple benefits for employees and the organisation, but only if they are carefully planned and properly implemented.



COMPETENCIES:

- Be thorough when determining the core competencies for each job position, and use specific descriptions for the different levels.
- Define the competencies as precisely as possible.

6. Annex

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6.1. Glossary

- **ACTUAL PROFILE**
Describes which competencies an employee currently has, and at what level
- **CHANGE MANAGEMENT**
Is a systematic way of bringing about and managing both organisational change and changes at the individual level
- **CLOSED QUESTIONS**
Are used to clarify a point of fact, and often only require a short or single-word answer: e.g. yes/no, or 1, 2, 3, 4, etc.
- **COMPETENCY**
Interrelated cluster of knowledge, skills and abilities needed by an individual, team, or organisation for effective performance. It includes the ability to act independently and creatively in a new, open situation
- **HUMAN RESOURCE MANAGEMENT (HRM)**
The process of managing human talent to achieve an organisation's objectives
- **HUMAN RESOURCE DEVELOPMENT**
Major HRM function consisting not only of training and development, but also of individual career planning and development activities, organisational development, performance management and appraisal
- **JOB**
Group of tasks that must be performed for an organisation to achieve its goals
- **JOB ANALYSIS**
Systematic process of obtaining information about a job by determining the involved duties, tasks and activities, and resulting in the competencies (skills, duties and knowledge) for performing a job within an organisation
- **JOB DESCRIPTION**
A statement of tasks, duties, and responsibilities of a job to be performed
- **JOB SPECIFICATION**
A document that outlines the minimum acceptable qualifications and competencies (knowledge, skills and abilities) needed by a person to perform a particular job
- **OPEN QUESTIONS**
Are used to draw the candidate out – begin with: what, why, when, who, ... tell me about ...
- **POSITION**
Collection of tasks and responsibilities performed by one person
- **TASK**
A unit of work or set of activities needed to produce some results
- **TARGET PROFILE**
Describes which competencies an ideal employee must have (at what level) in order to successfully perform the job – under consideration of the organisation's strategy, the job description/specification and performance level

6.2. Abbreviations

- **TNA**
Training Needs Analysis
- **TTI**
Team TNA Implementation
- **VTW**
Vocational Education and Training for Jordanians and Syrian Refugees in the Water Sector
- **WAJ**
Water Authority of Jordan



6.3. Selection of Suggested Verbs for Task Statements¹⁷

Account	To give a report on; to furnish a justifying analysis or explanation
Act	To perform a specified function
Adjust	To bring to a more satisfactory state; to bring the parts of something to a true or more effective position
Advise	To recommend a course of action; to offer an informed opinion based on specialised knowledge
Answer	To speak or write in reply
Appraise	To give an expert judgment of worth or merit
Approve	To accept as satisfactory; to exercise final authority with regard to commitment of resources
Arrange	To prepare for an event; to put in proper order
Assemble	To collect or gather together in a predetermined order from various sources
Assign	To specify or designate tasks or duties to be performed by others
Assist	To help or aid others in the performance of work
Attain	To come into possession of; to arrive at
Attend	To be present
Audit	To examine officially with intent to verify
Authorize	To approve; to empower through vested authority
Budget	To plan expenditures
Build	To construct
Calculate	To make a mathematical computation
Call	To communicate by telephone; to summon; to announce
Circulate	To pass from person to person or place to place
Code	To put into words or symbols used to represent words
Collaborate	To work jointly with; to cooperate with others
Collect	To gather
Communicate	To impart a verbal or written message; to transmit information

Compare	To examine for the purpose of discovering resemblances or differences
Compile	To put together information; to collect from other documents
Compute	To determine or calculate mathematically
Confirm	To give approval to; to assure the validity of
Consolidate	To bring together
Construct	To make or form by combining parts; to draw with suitable instruments and under specified conditions
Consult	To seek advice from others; to give professional advice or services
Contact	To communicate with
Control	To measure, interpret, and evaluate actions for conformance with plans or desired results
Coordinate	To regulate, adjust, or combine the actions of others to attain harmony
Correct	To make or set right; to alter or adjust to conform to a standard
Create	To bring into existence; to produce through imaginative skill
Delegate	To commission another to perform tasks or duties which may carry specific degrees of accountability and authority
Design	To conceive, create, and execute according to plan
Develop	To disclose, discover, perfect, or unfold a plan or idea
Direct	To guide work operations through the establishment of objectives, policies, rules, practices, methods, and standards
Distribute	To deliver to a proper destination
Divert	To change course or use to another
Eliminate	To get rid of; to set aside as unimportant
Encourage	To inspire with spirit, hope; to give help or patronage to
Enlist	To engage for duty; to secure the support and aid of
Estimate	To forecast future requirements
Evaluate	To determine or fix the value of
Expedite	To accelerate the process or progress of

¹⁷ Source: *Guide for Writing Functional Competencies from* [https://home.ubalt.edu/tmitch/651/PDF%20articles/Guide%20for%20Writing%20Functional%20Competencies%20\(Annotated\).pdf](https://home.ubalt.edu/tmitch/651/PDF%20articles/Guide%20for%20Writing%20Functional%20Competencies%20(Annotated).pdf)

Gather	To collect; to harvest; to accumulate and place in order
Generate	To bring into existence; to originate by vital or chemical process
Guarantee	To secure; to answer for the debt, default, or miscarriage of
Help	To be of use to; to relieve; to remedy; to serve
Identify	To establish the identity of; to associate with some interest
Improve	To make something better
Inform	To make known
Initiate	To start; to introduce; to originate
Innovate	To exercise creativity in introducing something new or in making changes
Install	To place in office; to establish in an indicated place, condition, or status; to set up for use in service
Instruct	To teach
Interpret	To give the meaning of; to explain to others
Interview	To obtain facts or opinions through inquiry or examination or various sources
Inventory	To catalogue or to count and list
Investigate	To observe or study by close examination and systematic inquiry
Issue	To put forth or to distribute officially
Justify	To prove or show to be right or reasonable
Lead	To guide or direct on a course or in the direction of; to channel; to direct the operations of
Maintain	To keep in an existing state
Make	To cause to happen to; to cause to exist, occur, or appear; to create; to bring into being by forming, shaping, or altering material
Mediate	To interpose with parties to reconcile them; to reconcile differences
Modify	To make less extreme; to limit or restrict the meaning of; to make minor changes in
Negotiate	To confer with others with a view to reaching agreement
Obtain	To acquire or gain possession of
Operate	To perform an activity or series of activities
Participate	To take part in
Permit	To consent to; to authorise; to make possible
Persuade	To move by argument or entreaty to a belief, position, or course of action
Place	To locate and choose positions for

Plan	To devise or project the realisation or achievement of a course of action
Practise	To perform or work at repeatedly in order to gain proficiency
Prepare	To make ready for a particular purpose
Present	To introduce; to bestow; to lay as a charge before the court; to offer to view
Process	To subject to some special treatment; to handle in accordance with a prescribed procedure
Procure	To obtain possession of; to bring about
Produce	To grow; to make, bear, or yield something; to offer to view or notice; to exhibit
Project	To throw forward; to present for consideration; to communicate vividly, especially to an audience
Promote	To advance to a higher level or position
Propose	To form or declare a plan or intention
Purchase	To buy or procure by committing organisational funds
Receive	To acquire, come into possession of
Recommend	To advise or counsel a course of action; to offer or suggest for adoption
Reconcile	To adjust; to restore to harmony; to make congruous
Reconstruct	To rebuild; to reorganise or re-establish
Record	To register; to set down in writing
Refer	To send or direct for aid, treatment, information, or decision; to direct attention; to make reference to
Report	To give an account of; to furnish information or data
Research	To inquire specifically, using involved and critical investigations
Respond	To make an answer; to show favourable reaction
Retrieve	To regain; to rescue
Revise	To rework in order to correct or improve; to make a new, improved, or up-to-date version
Schedule	To plan a timetable; to fix time
Secure	To gain possession of; to guarantee; to make safe
Select	To choose the best-suited
Send	To dispatch by a means of communication; to convey
Solicit	To approach with a request or plea; to strongly urge
Solve	To find a solution for

6.4. Examples of Features of the Four Key Competencies

PROFESSIONAL COMPETENCIES	METHODOLOGICAL COMPETENCIES	SOCIAL COMPETENCIES	PERSONAL COMPETENCIES
JOB: SALES REPRESENTATIVE			
<ul style="list-style-type: none"> • sales techniques • sales strategies • marketing knowledge • negotiation strategies • sales promotion • maintenance skills • knowledge of instruction • repair skills 	<ul style="list-style-type: none"> • time management • planning methods • Ishikawa diagram • problem analysis tool • online advertising • hyper marketing • ALPEN method ¹⁸ 	<ul style="list-style-type: none"> • customer dialogue • conducting negotiations • team discussions • questioning techniques • motivating/inspiring • pleasant telephone voice • establishing contact with customers 	<ul style="list-style-type: none"> • punctuality • willingness for qualification measures • psychological resilience • quick understanding • commitment • self-confidence • ability to improvise
JOB: HUMAN RESOURCE ASSISTANT			
<ul style="list-style-type: none"> • interview techniques • knowledge of the principles of employee selection • legal knowledge • grievance procedures • marketing know-how • job posting procedures • compensation policies • knowledge of the structure and technical field of the organisation • job characteristic model • onboarding procedures • application testing programmes • market and competitive environment 	<ul style="list-style-type: none"> • presentation & moderation techniques • project management • using IT technology • using technical equipment and tools • problem-solving techniques • ability to develop and apply specialist skills • systematic thinking • information management • decision-making techniques • dealing with different sources of information • quality focus 	<ul style="list-style-type: none"> • social understanding • social dexterity • social responsibility • respect and courtesy • conflict resolution skills • civil courage • environmental awareness • empathy • communication skills • cooperation and teamwork • ability to motivate and convince • intercultural knowledge • interpersonal skills and relationship building • modesty, humility • verbal and written skills • listening comprehension 	<ul style="list-style-type: none"> • autonomy (independence and self-discipline) • frustration tolerance • ability to cope with stress • commitment • psychological resilience • quick understanding • willingness to learn • willingness to perform • self-confidence • ability to improvise • willingness to take on responsibility • willingness to change that require diligence and endurance • reliable

¹⁸ for daily planning

6.5. List of Selected Action Verbs Grouped According to Bloom's Taxonomy¹⁹

BLOOM'S DEFINITION					
I. KNOWING	II. UNDERSTANDING	III. APPLYING	IV. ANALYSING	V. EVALUATING	VI. CREATING
Person exhibits memory of previously learned rules, standards and regulations	Person demonstrates understanding of rules, standards and regulations by organising, comparing, giving descriptions, and stating main ideas	Person applies acquired knowledge, techniques, rules and regulations to solve problems and adapt to new situations in a different way	Person examines and breaks information into parts by identifying motives or causes. Concludes and finds proof to generalise	Person assesses information, evaluates the validity of ideas or quality of work based on a set of criteria, and defends his/her opinion	Person compiles information in a different way. He/she combines the elements in a new pattern or proposes alternative solutions
define find label list match memorise name omit recall relate repeat select show spell tell visualise	classify compare differentiate explain extend illustrate infer interpret outline relate rephrase rewrite show summarise translate	apply choose calculate develop demonstrate estimate experiment with interview manipulate make use of organise plan schedule solve transfer	analyse break down categorise change classify combine compare conclude contrast discover dissect distinguish divide explain focus infer list modify separate simplify survey test take part in test for point out order outline	appraise assess compare conclude criticise decide defend determine disprove estimate evaluate explain influence find errors grade judge justify measure perceive persuade predict prioritise prove rate recommend rule on select summarise support weigh	adapt arrange build combine compile compose construct create design develop discuss elaborate estimate facilitate happen imagine integrate intervene maximise minimise modify originate plan predict propose reorganise solve suppose test validate

¹⁹ Adapted from (Lafreniere) based on Anderson, L.W., & Krathwohl, D. R. (2001) *A taxonomy for learning, teaching, and assessing, Abridged Edition*. Boston, MA: Allyn and Bacon; downloaded 28 Feb 2018 4:31 PM (Cornell University), downloaded 20 Jun 2018 4:25 PM

6.6. Selected Templates







6.6.1 JOB DESCRIPTION AND JOB SPECIFICATION

JOB DETAILS	
Job Type:	Job Type Code:
Category:	Category Code:
Type of Group:	Group Code:
Level:	Level Code:
Job Title:	Job Title Code:
Professional Group:	Professional Group Code:
	Employment Symbol Code:
JOB PURPOSE/ STATEMENT	

NO.	MAIN TASKS	%
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
NO.	ADDITIONAL TASKS	%
1		
2		
3		
4		
5		
6		

QUALIFICATIONS	
WORK EXPERIENCE	

COMPETENCIES NEEDED FOR ...

4 = **excellent** = works independently and solves problems creatively
 3 = **good** = works independently / 2 = **fair** = works with guidance

PROFESSIONAL COMPETENCIES	4	3	2
METHODICAL COMPETENCIES	4	3	2
SOCIAL COMPETENCIES	4	3	2
PERSONAL COMPETENCIES	4	3	2



6.6.2 TARGET PROFILE DIRECTOR INTERVIEW

DIRECTOR INTERVIEW (TARGET PROFILE)

Hello, I am _____ (Name)
 from _____ (Department), and we are conducting an analysis
 among directors, supervisors and employees to determine the training needs of employees
 for _____ (Job).

One of the challenges facing HR is to establish the exact requirements for the job and
 the training needs for individual staff members. It has therefore been decided to apply the
 Training Needs Analysis (TNA) methodology, which is a systematic procedure to identify
 training needs within an organisation. The subsequent training plan will be aligned to the
 organisation's business or development plans. This methodology will be applied
 at _____ (XXX) for _____ (Job) and,
 at a later date, to all the jobs within the organisation.

I would like to ask you a few questions about the Target Job Profile for
 _____ (Job), the related tasks and competencies, and the required
 qualifications for the employee to perform the job in the most effective and efficient way.

INTERVIEWER:	Date:	Time:	-
INTERVIEWEE INFORMATION (DIRECTOR)			
Director's name:			
Directorate:	Department:		
Email:	Mobile no.:		
How long have you been in your current position (years / months)?			

RESPONSIBILITIES OF DIRECTOR:

Which sections does _____ (Job) cooperate with and in what way?

→

Please list how many and which persons or groups you have personal responsibility for:

→

Please describe the major tasks for _____ (Job) and how much time she/he spends on each task:

→



MAJOR, ADDITIONAL AND FUTURE TASKS

'MAJOR' = tasks that are conducted and considered to be part of the job

'ADDITIONAL' = tasks that are conducted but not considered part of the job

'FUTURE' = tasks that may be planned to be conducted in future

Please list the tasks for _____ (Job) and how much time she/he spends on each task.

→ Frequency: Daily / Periodic (at fixed times [f], monthly [m], quarterly [q], semi-annually [sa], annually [a]) / irregular

NO.	TASKS	FREQUENCY			IMPORTANCE			INDEPENDENT		TOOLS
		Daily	Periodic	Irregular	High	Medium	Low	Yes	No	

[f m q sa a]

MAJOR TASKS

1										
2										
3										
4										

ADDITIONAL TASKS

1										
2										
3										
4										

FUTURE TASKS

1										
2										
3										
4										



1. COMPETENCIES

4 = **excellent** = works independently and solves problems creatively
3 = **good** = works independently / 2 = **fair** = works with guidance

What competencies should _____ (*Job*) have? At what level?

		excellent	good	fair
NO.	PROFESSIONAL COMPETENCIES	4	3	2
1				
2				
3				
NO.	METHODICAL COMPETENCIES	4	3	2
1				
2				
3				
NO.	SOCIAL COMPETENCIES	4	3	2
1				
2				
3				
NO.	PERSONAL COMPETENCIES	4	3	2
1				
2				
3				



2. MAJOR REQUIREMENTS

What are the requirements (qualifications, languages, certificates, licenses)
of _____ (*Job*) and to what level?

QUALIFICATIONS:

WORK EXPERIENCE:

E = high level of proficiency
 G = good knowledge / F = fair, basic

	high	good	fair
ENGLISH LANGUAGE	E	G	F
Reading			
Speaking			
Writing			
CERTIFICATES	E	G	F

→

LICENSES (What licenses should he/she have?)	E	G	F
---	---	---	---

→

→ 3. CHALLENGES

What challenges does _____ *(job)* face?

→

→ 4. ADDITIONAL COMMENTS

e.g.: any additional trainings or other measures you would recommend
 for _____ *(job)*

→



6.6.3 TARGET PROFILE EMPLOYEE INTERVIEW

EMPLOYEE INTERVIEW (TARGET PROFILE)

Hello, I am _____ (Name)
 from _____ (Department), and we are conducting an analysis
 among directors, supervisors and employees to determine the training needs of employees
 for _____ (Job).

One of the challenges facing HR is to establish the exact requirements for the job and
 the training needs for individual staff members. It has therefore been decided to apply the
 Training Needs Analysis (TNA) methodology, which is a systematic procedure to identify
 training needs within an organisation. The subsequent training plan will be aligned
 to the organisation's business or development plans. This methodology will be applied
 at _____ (XXX) for _____ (Job) and,
 at a later date, to all the jobs within the organisation.

I would like to ask you a few questions about the Target Job Profile for
 _____ (Job), the related tasks and competencies, and the required
 qualifications in order for you to perform your job in the most effective and efficient way.

INTERVIEWER:	Date:	Time:	-
INTERVIEWEE INFORMATION (EMPLOYEE)			
Employee name:	Employee ID:		
Directorate:	Department:		
Email:	Mobile no.:		
How long have you been in your current position (years / months)?			
Supervisor's name:	Manager's name:		
Director's Name:			
EDUCATION AND CERTIFICATES (please specify)			
<input type="checkbox"/> Bachelor's Degree:			
<input type="checkbox"/> Master's Degree:			
<input type="checkbox"/> PhD (Doctorate Degree):			

PLEASE LIST THE TASKS THAT YOU PERFORM AS A _____ (Job) :

Describe your tasks in the following categories: daily tasks, periodic tasks, tasks performed at irregular intervals:



Describe briefly what machines, tools, equipment or software you use on a regular basis:



How do you weight the level of importance of each task?



What tasks can you do independently?



Do you perform additional tasks not presently included in your job description? Please describe.



Are there any new tasks you expect to perform in the future?



MAJOR, ADDITIONAL AND FUTURE TASKS

'MAJOR' = tasks that are conducted and considered to be part of the job

'ADDITIONAL' = tasks that are conducted but not considered part of the job

'FUTURE' = tasks that may be planned to be conducted in future

Please list the tasks for _____ (*Job*) and how much time she/he spends on each task.

➔ Frequency: Daily / Periodic (at fixed times [f], monthly [m], quarterly [q], semi-annually [sa], annually [a]) / irregular

NO.	TASKS	FREQUENCY			IMPORTANCE			INDEPENDENT		TOOLS
		Daily	Periodic	Irregular	High	Medium	Low	Yes	No	

[f m q sa a]

MAJOR TASKS

1										
2										
3										
4										

ADDITIONAL TASKS

1										
2										
3										
4										

FUTURE TASKS

1										
2										
3										
4										

➔ 1. COMPETENCIES

4 = **excellent** = works independently and solves problems creatively

3 = **good** = works independently / 2 = **fair** = works with guidance

What competencies should _____ *(Job)* have? At what level?

		excellent	good	fair
NO.	PROFESSIONAL COMPETENCIES	4	3	2
1				
2				
3				
NO.	METHODICAL COMPETENCIES	4	3	2
1				
2				
3				
NO.	SOCIAL COMPETENCIES	4	3	2
1				
2				
3				
NO.	PERSONAL COMPETENCIES	4	3	2
1				
2				
3				

➔ 2. MAJOR REQUIREMENTS

What are the requirements (qualifications, languages, certificates, licenses) of _____ *(Job)* and to what level?

QUALIFICATIONS:

WORK EXPERIENCE:

E = high level of proficiency
G = good knowledge / **F** = fair, basic

	high	good	fair
ENGLISH LANGUAGE	E	G	F
Reading			
Speaking			
Writing			
CERTIFICATES	E	G	F

→

LICENSES (What licenses are you expected to have?)	E	G	F
---	----------	----------	----------

→

3. CHALLENGES

What challenges do you face?

→

4. ADDITIONAL COMMENTS

e.g.: requests for additional trainings or other measures, etc.

→



6.6.4 ACTUAL PROFILE SUPERVISOR INTERVIEW

EMPLOYEE INTERVIEW (TARGET PROFILE)

Hello, I am _____ *(Name)*
 from _____ *(Department)*, and we are conducting an analysis
 among directors, supervisors and employees to determine the training needs of employees
 for _____ *(Job)*.

One of the challenges facing HR is to establish the exact requirements for the job and
 the training needs for individual staff members. It has therefore been decided to apply the
 Training Needs Analysis (TNA) methodology, which is a systematic procedure to identify
 training needs within an organisation. The subsequent training plan will be aligned
 to the organisation's business or development plans. This methodology will be applied
 at _____ *(XXX)* for _____ *(Job)* and,
 at a later date, to all the jobs within the organisation.

I would like to ask you a few questions about _____ *(name of employee)* in order
 to determine the level of the job competences she/he has. Based on your answers, a gap analysis will be
 conducted, the training needs determined, and a training plan will be prepared for this employee
 to help them improve their performance and accomplish their tasks in a more effective and efficient way.

INTERVIEWER:	Date:	Time:	-
INTERVIEWEE INFORMATION (SUPERVISOR)			
Interviewee name:	Position:		
Email:	Mobile no.:		
How long have you been in your current position (years / months)?			
Employee name:	Years in the organisation:		
Directorate:	Department:		
Manager's Name:	Director's Name:		
EDUCATION AND CERTIFICATES (please specify)			
<input type="checkbox"/> Bachelor's Degree:			
<input type="checkbox"/> Master's Degree:			
<input type="checkbox"/> PhD (Doctorate Degree):			
Certificates:			



1. COMPETENCIES

4 = **excellent** = works independently and solves problems creatively

3 = **good** = works independently / 2 = **fair** = works with guidance

1 = **weak** = insufficient

This section covers different types of competencies.
Fill the blank that best suits your level

		excellent	good	fair	weak
NO.	PROFESSIONAL COMPETENCIES	4	3	2	1
1					
2					
3					
NO.	METHODICAL COMPETENCIES	4	3	2	1
1					
2					
3					
NO.	SOCIAL COMPETENCIES	4	3	2	1
1					
2					
3					
NO.	PERSONAL COMPETENCIES	4	3	2	1
1					
2					
3					



2. MAJOR REQUIREMENTS

E = high level of proficiency

G = good knowledge / F = fair, basic

	high	good	fair
ENGLISH LANGUAGE	E	G	F
Reading			
Speaking			
Writing			
CERTIFICATES	E	G	F



→

→ 3. CHALLENGES

What challenges does _____ *(Name)* face?

→

→ 4. ADDITIONAL COMMENTS

e.g.: any additional trainings or other measures you would recommend
for _____ *(Name)*?

→



EMPLOYEE QUESTIONNAIRE (ACTUAL PROFILE)
PURPOSE AND INSTRUCTIONS

The purpose of the analysis is to obtain current information on your job based on a review of job duties and responsibilities, and to **analyse your training needs**.

Because you know your duties and responsibilities better than anyone else, we need your help to get an accurate description of your job competencies. We are asking you to complete this questionnaire that asks for information about your competencies. The questionnaire does not ask about your job performance; only what your job requires you to have.

Please complete this questionnaire as honestly, completely and accurately as you can. Base your answers on what is normal to your current job, not special projects or temporary assignment duties, unless these tasks are a regular part of your job. If two answers seem to fit your situation, just check the one that works best. When answering the questions, imagine you are describing what you do to a neighbour, friend, or someone just hired for your position.

We appreciate your active participation in this important analysis.
If you have questions, please feel free to ask your supervisor or division administrator.

Please make sure that all employees understand the concept of TNA and competencies.
Please use the available tools.

Date:

EMPLOYEE NAME:

Directorate:	Department:
Employee ID:	
Email:	Mobile no.:

How long have you been in your current position (years / months)?

Supervisor's name:	Manager's Name:
Director's Name:	

EDUCATION AND CERTIFICATES (please specify)

Bachelor's Degree:

Master's Degree:

PhD (Doctorate Degree):



1. COMPETENCIES

4 = **excellent** = works independently and solves problems creatively

3 = **good** = works independently / 2 = **fair** = works with guidance

1 = **weak** = insufficient

This section covers different types of competencies.
Fill the blank that best suits your level

		excellent	good	fair	weak
NO.	PROFESSIONAL COMPETENCIES	4	3	2	1
1					
2					
3					
NO.	METHODICAL COMPETENCIES	4	3	2	1
1					
2					
3					
NO.	SOCIAL COMPETENCIES	4	3	2	1
1					
2					
3					
NO.	PERSONAL COMPETENCIES	4	3	2	1
1					
2					
3					

→ 2. MAJOR REQUIREMENTS

E = high level of proficiency
G = good knowledge / **F** = fair, basic

	high	good	fair
ENGLISH LANGUAGE	E	G	F
Reading			
Speaking			
Writing			
CERTIFICATES	E	G	F

→

LICENSES	E	G	F
-----------------	----------	----------	----------

→

→ 3. CHALLENGES

What challenges do you face?

→

→ 4. ADDITIONAL COMMENTS

e.g.: requests for additional trainings or other measures, etc.

→

Employee's Signature

Date

6.7. List of Digital Templates and Tools available from WAJ and GIZ

→ **ALL THE TEMPLATES AND TOOLS LISTED BELOW CAN BE REQUESTED FROM WAJ AND/OR GIZ, AND BE USED OR ADAPTED FOR NEW TNA PROCESSES.**
The templates were originally created in Arabic and provided by WAJ as an English 'working version'. They may therefore require some revision.

- I. **Templates: Job Description and Job Specification**

- II. **Templates: Target Profile**
 - a. Target Profile Director Interview
 - b. Target Profile Supervisor Interview
 - c. Target Profile Employee Interview
 - d. Target Profile Benchmarking Interview
 - e. Target Profile Workshop Agenda and Programme

- III. **Templates: Actual Profile**
 - a. Actual Profile Supervisor Interview
 - b. Actual Profile Employee Questionnaire
 - c. Actual Profile Employee Interview

- IV. **Tools: Invitation und Information Material**
 - a. General Presentation of the TNA Process
 - b. General Presentation of Competencies
 - c. Presentation of Changes
 - d. Elevator Pitches (TNA and Competencies)
 - e. Invitation Letter to Participate in TNA Process (Field Visit)
 - f. Invitation Letter for Workshop

- V. **Tools and Templates: Explanation and Documentation of Results (Target Profile, Actual Profile, Competency Matrix, Training Plan)**
 - a. Tool: Description of the Different TNA Steps
 - b. All Templates of the TNA Steps (MS-Excel Spreadsheet)
 - c. Tool: Examples of Training Programmes
 - d. Tool: Oracle

- VI. **Template: Implementation Plan and Milestones for the TNA Process**





PUBLISHED BY

Deutsche Gesellschaft für
Internationale Zusammenarbeit (GIZ) GmbH

Registered offices: Bonn and Eschborn

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PHOTOS

Thomas Imo/photothek.net,
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LAYOUT

Atelier Löwentor, Darmstadt

PROJECT NUMBER

16.2164.8.001.04

URL LINKS

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DRUCK

Druckriegel GmbH, Frankfurt am Main
Gedruckt auf FSC-zertifiziertem Papier

GIZ is responsible for the content of this publication

On behalf of
German Federal Ministry for Economic Cooperation
and Development (BMZ)

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LOCATION AND YEAR OF PUBLICATION

Mannheim, July 2018

