

A TRAINING NEEDS ASSESSMENT FOR THE UNITED WAY  
OF DUNN COUNTY WISCONSIN

by

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ABSTRACT

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This study attempted to assess the training needs of those nonprofit agencies receiving funding from the United Way of Dunn County. Interview questions were developed and administered to the agency directors face-to-face. A questionnaire was distributed to agency support staff and volunteers. Questions were designed to determine those common performance problems crossing agency lines that can be addressed by training. Not all performance problems can be addressed by training. In some cases, non-training interventions are necessary. By identifying performance problems that can be improved by training, the assessment will allow the agencies to focus on the real training needs within their organizations.

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## Chapter 1

### Research Problem and Objectives

#### Introduction

Training has long been an issue for organizations that exist in the nonprofit sector. Time and expense are the main issues that consistently surface in any discussion of nonprofit training needs. And time and expense impact smaller agencies to a much greater degree than larger organizations. The agencies receiving assistance from the United Way of Dunn County (UWDC) are among the smaller nonprofit agencies. Diane Simon (Simon), Director of UWDC realized that a digital divide existed between government agencies, the for-profit sector and the nonprofit sector. She also was aware of the divide that existed between the smaller and larger nonprofit agencies. She knew that training, especially in technology, was desperately needed by the UWDC agencies.

Simon had a great desire to help all of the agencies obtain training. A pivotal aspect of this desire was the goal of stronger communication, cooperation and collaboration between the community, the nonprofit agencies and University of Wisconsin-Stout (the university). She knew partnerships such as these could provide training and other opportunities for the agencies. The opportunity to formulate a plan for a partnership with the university occurred at a Menomonie, Wisconsin Optimist Club meeting in November of 2000.

At this meeting, Dr. Jim Frasier (Frasier), newly appointed Executive Director of Stout Solutions, presented information to the club about the formation of Stout Solutions, a new unit within the university. In the address, he discussed how Stout Solutions planned to reach out to the Menomonie community and surrounding areas in new and

innovative ways. Indeed, a specific objective listed in the Stout Solutions vision and mission document is to develop distance-delivered courses, conferences and other activities targeted for business, industry, government, education and not-for-profit sectors. Simon approached Frasier after the meeting and asked, “What can Stout Solutions do to help nonprofits in the area of training”?

Susan McClelland (McClelland), a member of the Stout Solutions team and UW-Stout graduate candidate in Training and Human Resource Development, was asked to contact Simon and explore exactly how the university could assist the United Way. Training was identified as an immediate problem to be addressed. The Training Needs Assessment that resulted is the subject of this research paper.

#### Statement of the Problem

Simon, Director of UWDC, believes that training deficiencies exist with resultant employee performance problems within the agencies receiving funding from UWDC. The problem is to determine if training deficiencies do exist and, if so, to identify the common training needs that cross agency lines.

#### Research Objective

The objective of this research (training needs assessment) is to collect and analyze data regarding the training needs within Dunn County, Wisconsin nonprofits at three levels: (1) administrative (agency directors), (2) staff and (3) volunteer. The research will enable identification of training needs common to the agencies. The desired outcome is that the research will be a catalyst in the design of low cost programs to meet the training needs of the agencies.

### Significance of the Study

Resources available to most nonprofit agencies supported in whole or in part by UWDC are being stretched almost to a breaking point. More people need the specialized services these agencies provide. This demand is being met without additional financial support. Reductions in funding from grants and contributions and increased demands from the public for efficient use of remaining dollars have pressured nonprofits to improve accountability and performance (Siciliano, 1997).

Ironically, the aftermath of the 9-11-2002 terrorist attack on the World Trade Center has resulted in decreased levels of donations from the overall population. Government appropriations have decreased and will continue to decrease as states face budget crunches. Thus, agencies are torn between the philosophical motivation to help everyone that needs assistance and the grim reality that time and finances are limited.

Given these financial constraints, hiring additional staff to handle the increased workload is out of the question. These are the times when staff should work smarter not harder. Training enables staff to work smarter. Productivity and efficiencies increase. So, a paradox emerges. First, how can an agency provide adequate training with little or no training budget and secondly, how does an agency release staff for training when time is at such a high premium?

Answers to these questions may lie in a partnership with the university. A training needs analysis will be conducted at no cost to the nonprofits. Expertise exists on the campus to provide training in many areas. Perhaps this training and the training facilities could be provided at no-cost or little cost to the agencies. Having the activities occur in Dunn County would greatly reduce the training time commitment since travel time would



be minimal. A needs assessment could be the initial stage in meeting the challenges of resource and time constraints.

A training needs assessment would insure that training exercises are focused and appropriate. For certain, training cannot be done for the sake of training. That is a luxury that no organization can really afford, especially the nonprofits. Some problems are often perceived as training problems when they are not. Agencies do not have the expertise to conduct in-depth needs analysis to determine what the real training issues are, or the money to hire someone to conduct individual analyses. Until specific training needs are isolated, it will be business as usual and no value-added changes in performance will occur.

The completion of this assessment and the results generated would provide data that could be used as the basis for grant requests and proposals. This would be a significant contribution of the needs assessment. Dollars are available from many philanthropic organizations to assist nonprofits in accomplishing worthwhile projects.

In summary, this training needs assessment is significant because it will greatly impact the nonprofits in Dunn County by recognizing bona fide training issues. Once these issues are identified, the agencies can work with the university to receive assistance with training issues, hopefully, at little or no cost. The university will have an avenue to reach out to the community and its members in a very positive way. Information gathered can be made a part of grants requesting funds to support training. Performance will be improved and value added to the agencies. Improved performance will translate into improved delivery of social services to the community. Improved delivery of social

services to the community means an improved quality of life for the citizens of Dunn County.

### Methods

This study analyzed the training needs of the agencies receiving funding from UWDC at three levels: (1) agency director (director/directors), (2) agency support staff (staff) and (3) agency volunteers (volunteer/volunteers). Face-to-face interviews were utilized to collect data from the agency directors. A questionnaire was the method used to collect data from the staff and volunteers. The questionnaire included questions asked of the directors but in an abbreviated form.

The interviews and questionnaires included questions on each agency's current training procedures and anticipated future training needs.

The responses were analyzed to provide an assessment of the training needs of nonprofit agencies (agencies) in Dunn County. This information will be used to assist the UWDC as they approach the university and other organizations to request assistance in meeting training needs, thereby adding value to the agency and the services available to the population of Dunn County, Wisconsin.

### Limitations of the Study

The study may be limited due to:

- In today's fast paced environment, training requirements can change so rapidly that data collected during a needs assessment, especially if the assessment spans an extended time frame, can become outdated fairly quickly (Gupta, 1999).

- Even though there will be a concentrated effort to get the questionnaire into the hands of all support staff and volunteers, there is no guarantee that the individuals will actually receive and complete the questionnaires.

### Assumptions

The following is assumed:

- Directors are available for interviews.
- Respondents are truthful when responding to questions on the survey.
- Technology training is a pressing issue for many nonprofits.
- The results, conclusions and recommendations of this training needs assessment will be used by the UWDC agencies to meet training and educational needs.

In the next chapter, a review of the literature occurs. It is here that a background for the study is established with a review and discussion of current practices.

## Chapter 2

### Review of the Literature

#### The Importance of Training

The significance and value of training has long been recognized. Consider the popular and often repeated quotation, “Give a person a fish and you feed him for a day. Teach a person to fish and you feed him for a lifetime.” This simple but profound saying is attributed to the wisdom of Confucius who lived in the 5<sup>th</sup> century BC. Given today’s business climate and the exponential growth in technology with its effect on the economy and society at large, the need for training is more pronounced than ever.

Training, in the most simplistic definition, is an activity that changes people’s behavior. Increased productivity is often said to be the most important reason for training. But it is only one of the benefits. Training is essential not only to increase productivity but also to motivate and inspire workers by letting them know how important their jobs are and giving them all the information they need to perform those jobs (Anonymous, 1998). McNamara (n.d.) lists the following as general benefits from employee training:

- increased job satisfaction and morale
- increased motivation
- increased efficiencies in processes, resulting in financial gain
- increased capacity to adopt new technologies and methods
- increased innovation in strategies and products
- reduced employee turnover

This is only a partial listing of the many benefits that result from training. Training that is appropriate to the needs of an organization can add great value.

So, why would an organization not welcome and seek out the value-added benefits resulting from training? Training is not always the answer to performance problems. Brandt Sakakeeny, training industry analyst for Solomon Smith Barney believes that training can be a great investment and training can be a waste of money (Rosner, 1999). Training is indeed a waste of money when the desired behavior does not occur. Gupta acknowledges that not all performance problems can be addressed by training. In many cases, non-training interventions are necessary (Gupta 1999). The key is to identify what problems can be attributed to training deficiencies and, once that is accomplished, to insure that the right training is implemented. Bartram and Gibson, in their *Training Needs Analysis Toolkit* agree. Without the right training, employees can be your [the organization's] biggest liability. Trained effectively, however, they can become your biggest asset (Bartram and Gibson, 2000). Rosner (1999) adds another ingredient for success – support after training. He states, “The most effective programs train workers in new behaviors and then train managers to support employees as they apply learning daily (Rosner, 1999, p.43). Support and endorsement from management can greatly enhance training results. One can conclude that training is not always the answer, and when it is the answer, it has to be the right training.

Training is big business. In 1998, American companies spent \$60 billion on training (Rosner, 1999). So, how does an organization train effectively so that the investment results in growth and success? To make training count, it must be matched directly to the needs of the organization and people in it. One tool that is used to accomplish this is the Training Needs Assessment. The assessment process is discussed later in the Review of the Literature.

## Training and the Nonprofit Sector

Nonprofits are one of the fastest growing segments of our emerging bold new economy (Glasrud, 1999). Over the past decade, the nonprofit sector grew from 1.2 million registered nonprofit organizations to over 1.6 million organizations. The sector now employs more than eleven million employees – more than the U.S. federal and state governments combined and approximately 7 percent of the nation's total workforce (Salamon, 1999). This growth is likely to continue as the demand for services provided by the sector continues to rise and the role of government in meeting individual needs continues to diminish (Boris and Steuerle, 1999). To be able to grow and serve the community, nonprofit executives must realign their thinking about the economies of service deliveries and who shall deliver those services. In combination, the increasing presence of the nonprofit sector and the shedding of the direct provision of services by government have served to create a growing demand for professionally trained nonprofit administrators (Dolan, 2002). To summarize, quite simply -- our nation's nonprofits face continued growth to meet increased demand with lessening resources and increased needs for training.

As anyone in the corporate training field knows, training often falls on the low end of the priority list. That's especially true in the nonprofit world. The agencies are aware of how expensive training is, and they're aware it's ongoing. But when the budget gets tight, training is probably the first to go. Another barrier to training is that some agencies have considerable turnover. They aren't eager to spend their scarce resources training employees who may later leave (Frye, 2000).

Technology has impacted everyone, but it has become an especially pressing issue for nonprofits. According to Gordon (1998), the technology revolution has yet to make significant inroads in the nonprofit sector. Further, many nonprofits lack funding and resources needed to use today's computer technology. The nonprofit organizations have to overcome fears and worries about how much money technology demands. Nonprofits feel behind the curve, unable to acquire or use information technologies at the same rate or with the same results as their for-profit colleagues. There is digital divide that exists between for-profit enterprises and nonprofit groups, as well as the inequity between large and small nonprofits (Gordon, 1998). Nonprofits realize that information technology can unleash great potential among nonprofits, if they can only gain access to the latest and best tools (Blau, 2001). Many are on the far side of the digital divide, and know the chasm will only get wider without some technical know-how. (Frye, 2000) Others agree. Nonprofit Technology Assistance Primer (September 2000) reiterates the sentiment that technology offers a great deal of potential, but nonprofits often don't have the skills or resources to maximize that potential.

For many nonprofit organizations, computer training has long been a luxury that's hard to afford. Computer skills are becoming a necessity for conducting administrative and office tasks. A problem common in the nonprofit sector is antiquated technology and a lack of in-house technical skills (Frye, 2000). The most essential issue for these organizations is staff time – and using information technology adds an additional drain to an already over-committed staff (cite.) Workers at nonprofit organizations “have been very frustrated because ‘they’re expected to perform, but they don’t have the technical skills’, says Leslie Withall, internal training manager at Kronos,

a software company in Chelmsford, MA (Frye, 2000). Computer literacy can make a huge difference to a nonprofit agency. When it comes to technology, nonprofits generally need professional advice and services, appropriate training, and good information about technology (Anonymous, 2000).

The nonprofit sector is growing and all indicators suggest continued growth. Human and financial resources are being stretched to extreme limits. Training for the nonprofit sector is problematic, especially in the area of technology training. The rapid rate of change in the technology field has left nonprofits behind. The gap will only increase if effective training programs are not implemented.

#### Why a Training Needs Assessment?

Some organizational and individual training needs are not as clearly defined as others. Even when training needs appear to be obvious, it is still necessary to choose appropriate methods that will meet them. Many training needs are not so obvious.

A training needs assessment is one of the most basic and common forms of assessment used by HRD professionals in the workplace (Gupta, 1999). Needs assessments help determine when training is the answer – and when it is not. Assessment insures that training programs have relevance to the people being trained.

Gupta, in his book *A Practical Guide to Needs Assessment*, gives the following overview of the training needs assessment:

A needs assessment provides the information that is usually necessary for designing training programs. The basic purpose of a training needs assessment is twofold:

- To identify the knowledge and skills that people must possess in order to perform effectively on the job, and



- To prescribe appropriate interventions that can close these gaps.

There are two main reasons to conduct a training needs assessment:

- It ensures that training programs are developed based on identified needs; and
- It is relatively easy to implement (Gupta, 1999).

Some performance problems can be addressed by training. Some problems training can't fix. Training isn't the answer to a problem when it's used to cover up the symptoms (Rosner, 1999). A needs assessment avoids misdiagnosing a non-training problem as a training problem.

#### A Review of Methods Commonly Used to Assess Training Needs

Data gathering is the cornerstone of any needs-assessment project (Gupta, 1999). The fundamental premise of needs assessment is that in order to make effective decisions about current or future training needs, data must first be gathered (Gupta, 1999).

There are many ways to collect data. Commonly used methods are interviews, focus groups, surveys and questionnaires, and observation. Other methods include the nominal group technique, action research, and Dacum (developing a curriculum). Most needs assessments employ one or several data-gathering techniques (Gupta, 1999).

Interviews are one of the easiest tools for gathering information. Interviews can be conducted face-to-face or over the phone. The biggest benefit of one-to-one interviews is the human interaction that occurs (Gupta, 1999). Phone interviews are more effective when small pieces of information must be gathered. One-to-one and phone interviews can be conducted in either a structured or unstructured manner. Another advantage is that the interviewer can clarify answers when necessary and ask whether interviewees have additional questions at the end. Vicki S. Kaman (Allen, 1990) agrees. She lists the

advantages of interviews as: (1) employees can be encouraged to share their ideas; (2) interviews provide process, as well as content information, and (3) interviews provide two-way communication. Interviews also work quite well when the target group is small in number. There are 23 UWDC agencies.

Focus groups implement a group-interview method. People with similar experiences are brought together and asked their opinions and/or ideas about a specific subject. To be effective, focus groups require good facilitators (Gupta, 1999).

Preparing and implementing surveys and questionnaires require several stages including preparing, designing, developing questions, writing instructions, writing cover letters and pilot testing, (Gupta, 1999).

Observation is also a method that can be used to collect data during needs assessments. A problem that occurs when using observation is that people often alter their behavior when someone is watching. To overcome this, techniques that are not obtrusive must be used.

According to Gupta (1999), the main drawback to the training needs assessment approach is that it lacks the rigor of a strategic needs assessment, competency assessment, or job and task analysis.

### Results of Other Nonprofit Training Needs Assessments

A review of the literature identified four recent assessments of the training needs of specific nonprofit organizations. Highlights of (1) a nonprofit needs survey of the Charlottesville-Albermarle Region; (2) surveys of nonprofit directors in the Miami Valley of southwestern Ohio; (3) a survey of the United Way of Massachusetts Bay, and

(4) an Educational Program Assessment conducted by the Madison, Wisconsin-based Learning Institute for Nonprofit Organizations will be discussed in this section.

The Charlottesville, Albemarle Region Nonprofit Needs Survey was sponsored by Virginia Piedmont Technology Council's Connected Community Initiative and the Charlottesville Regional Chamber of Commerce Nonprofit Roundtable. The two groups worked in partnership to determine the most pressing issues facing regional nonprofit organizations. The needs survey captured information from 60 nonprofit organizations in Charlottesville, Albemarle and surrounding areas. The survey questions focused on the areas of technology needs of the regional nonprofits and the need for a Nonprofit Resource Center. The survey was distributed on April 2, 2001 to approximately 250 regional nonprofit organizations. Sixty surveys (25% response rate) were completed and returned. Results of the survey deemed important for consideration are:

- Most of the respondents indicated they want to be able to do more with technology. Funding, time and expertise were perceived as equally significant barriers to reaching the desired level of technology usage.
- Respondents viewed technology consulting and group training as the most valuable forms of outside technology assistance. Group training was clearly recognized as the most valuable type of external assistance in improving the effectiveness of technology use in local nonprofit organizations (47%).
- The training needs most frequently cited were Internet training and training on software to manage client files.

- 78% said they would utilize educational seminars occasionally or regularly.
- Volunteer management is a primary training need.

The Learning Institute for Nonprofit Organizations was founded in 1996. The goal of the Learning Institute is to provide affordable, accessible learning experiences for all involved in the nonprofit sector. In 1996, the Institute conducted an educational program assessment to gather the opinions of board members and staff of nonprofit organizations regarding a variety of current and future educational program opportunities. The survey included the Madison, Oshkosh/Fox Cities and Fond du Lac areas of Wisconsin. Three hundred and fifty eight surveys were returned. The top four training priorities identified as a result of the survey were fundraising, planning, management and marketing.

Dolan (2002) in the article, "Training Needs of Administrators in the Nonprofit Sector: What are they and how should we address them?" contributes information on the design of nonprofit programs by exploring the self-identified needs of nonprofit administrators. The premise for the article is that as the demand for professionally trained nonprofit personnel increases and, subsequently, academic institutions move to meet that demand, assessment needs to be conducted to provide a foundation of information to assist in the decision-making processes. He identifies a number of issues that have emerged as those institutions seek ways to meet the needs of nonprofit organizations. Dolan believes three things must be determined: the training needs of the nonprofit sector, the characteristics of the organizations to consider when making training decisions, and the preferred methodologies for delivering services. He refers to two

surveys of nonprofit directors in the Miami Valley region of southwestern Ohio. Included within the surveys were questions specifically targeting the training needs of administrators in the nonprofit sector and the preferred methods for training delivery. Two surveys were mailed over a two-year period (1996-1997) to all listed 501©(3) nonprofit organizations in the identified region. Surveys went out to the directors of 1200 identified agencies. Nearly 600 different directors supplied information on their nonprofit organizations. Directors of nonprofit agencies were asked to identify the three most pressing needs. The largest areas of interest was training that has the prospect of leading to additional financial resources for the organization. Training in the art of fundraising leads the list, with grant writing just behind. When fundraising and grant writing were removed from the data, the needs identified by the administrators became more evenly dispersed. More than 10% of the nonprofit administrators selected issues such as volunteer administration, building and maintain cooperative efforts, and planning. (Dolan, 2002).

The 1997 survey asked nonprofit administrators to identify the sources of their current training. Over half of the organizations provided in-house training; almost 34 percent looked to other nonprofit organizations for training; and nearly 30 percent indicated that academic institutions were providing some training. Regarding the format nonprofit organizations prefer for their training, the traditional classroom setting is not always an attractive option for nonprofit organizations.

Results of the 1997 survey indicate an apparent preference for the more short-term techniques, especially half-day and daylong seminars. Management appears to desire programs that take short amounts of time to supply significant pieces of

information—a quick means to supply information for immediate needs. Half-day seminars, daylong seminars, luncheon sessions, certificate programs, and breakfast sessions appear to hold great appeal for those in the nonprofit sector. Nonprofit organizations do have funding for training; nearly 60 percent of directors indicated that organizational resources were dedicated to training. A smaller percentage of organizations with lower income levels dedicate resources to training. The majority of training provided to the nonprofit sector is being provided in-house. The next largest percentage is provided by other nonprofit organizations (Dolan, 2002). The research also indicated that the traditional classroom experience is not the most attractive alternative. Clearly, the nonprofit sector needs professional training.

The United Way of Massachusetts Bay surveyed 100 agencies to find out more about the technology needs of nonprofits. Seventy three percent cited computer training as a top concern (Frye, 2000).

### The Viability of Partnerships

The cornerstone of Simon's plan to provide training to the UWDC agencies involved the formation of a partnership with the university. This section provides a review of the literature on the subject and looks at the realities and sources of partnering for nonprofit organizations.

Nonprofit organizations that have often needed to accomplish their mission with limited resources find themselves stretched to the breaking point. As government cuts back social spending, many people expect the social sector to absorb much of the anticipated need for services. Around the country, hundreds of local initiatives have brought together leaders of business, government, and voluntary organizations to

accomplish common goals – in job training, education, social services, cultural appreciation, and community revitalization. Frye (2000) in an Inside Technology Training Feature Story describes a unique technology assistance program called Teaming for Technology – a partnership between the United Way, IBM Corporation and Americorps\*Vista. Teaming for Technology resulted from a presidential summit on volunteerism in 1998 when then president Clinton and Colin Powell asked businesses to make a commitment to improving their communities (Frye, 2000). The need to replicate their successes elsewhere grows daily.

Austin (2000) believes that cross-sector partnering between business, government, and nonprofits will be the collaboration paradigm of the 21<sup>st</sup> century. Gordon (1998) discusses nonprofits lack of funding and the resources needed to use today's computer technology, and reveals one solution that's working is the formation of partnerships that match technology "haves" with "have nots." He continues to describe an example of a partnership between the Earth Pledge Foundation and Microsoft and expresses a belief that this partnership could provide a nationwide model (Austin, 2000). Others agree that nonprofits should seek to establish relationships. Smart organizations look for partnerships, projects and support to ... create new opportunities (Anonymous, 1998). Peter Drucker, founder of the Peter F. Drucker Foundation for Nonprofit Management and internationally acclaimed management guru, believes that today's business/social sector partnerships are as important a social innovation as the rise of organized philanthropy a century ago or the New Deal 60 years ago (Drucker, n.d.).

But where does a nonprofit find organizations with which to partner? One excellent place to look for win-win relationships is your local college or university

(Bailey, 2000). The missions of most colleges favor nonprofit partnering. Since the true win-win relationship fulfills the missions of both partners, colleges make ideal collaborators for nonprofits (Bailey, 2000). The collective knowledge of faculty and administrators is impressive. Professors are usually required to perform community service. Such service is considered part of their workload, included in their promotion and tenure evaluations. Thus, they're highly motivated to identify opportunities for public service (Bailey, 2000).

The literature supports the premise that partnerships are extremely important and can greatly impact the success of a nonprofit organization in the area of training. Partnerships with universities are desirable and can be extremely advantageous. Simon made a wise decision to look to the university for assistance in conducting the training needs assessment.

### Conclusions

A review of the literature has resulted in the following conclusions which are deemed the most important to consider as the research methodology is designed.

- (1) Training is not always the answer to performance problems. Non-training interventions may also provide solutions to problems. A training needs assessment will help determine when training is the answer.
- (2) Time and funding are the two most significant barriers to training for nonprofits.
- (3) The nonprofit sector will continue to grow. The problems of time and funding will not disappear. Agencies must look to innovative ways to close the gap. Partnering with business and educational organizations is



resulting in unique programs. Partnerships appear to be the wave of the future.

- (4) Previous studies have identified technology/computer training, grant writing and fundraising as the most pressing training needs for nonprofits. Due to the rapidly changing field of technology, it is very likely that this type of training will continue to be problematic for nonprofits.
- (5) Programs that require short amounts of time (half-day, one-day seminars, etc.) are the preference.
- (6) Face-to-face interviews are easy, yet effective in assessing training needs. They are time consuming, but the interaction that occurs can be extremely beneficial. The needs assessment is part of a university effort to reach out to the community. Face-to-face interviews should be carefully considered when determining the methodology of the research.

## Chapter 3

### Research Methods

#### Introduction

The study is be descriptive in nature, specifically, a training needs assessment. The book, A Practical Guide to Needs Assessment, by Kavita Gupta was used as a guide to conduct the assessment. The design of the study, population, instrumentation and analysis of results are also discussed in this chapter.

#### Design of the Study

The key phases of the training needs assessment were:

Phase I: Gather Preliminary Data

Phase IV: Analyze Data

Phase II: Plan

Phase V: Prepare Report

Phase III: Perform Training Requirements Analysis

Data gathering is essential to a needs assessment. This allows effective decision-making about current or future training needs. Gathering preliminary data was the first objective of the study. This was accomplished through a series of six (6) meetings occurring in December 2000 and January 2001, each an hour in length, involving the researcher and Simon. The objectives of the study and desired outcomes were established early in the meeting process. Background information and agency contact information was supplied by Simon. The researcher attended a UWDC Board of Directors meeting to obtain buy-in and support for the assessment. At the meeting, the process was explained, the objectives stated, and the potential use of the results discussed.

Information gathered during the meetings with Simon that could significantly impact the needs assessment included:

- UWDC nonprofits are experiencing a turnover in leadership positions. Several directors have recently resigned. Some of the vacant positions have been filled recently while others remain vacant. For the vacant positions, Simon provided the name of a staff member who agreed to participate in the interview process. For the purpose of this report, substitutes for directors will be referred to as directors.
- The UWDC Board of Directors supports Simon in her efforts to secure training for the nonprofits.
- The training budgets, if any, of the UWDC nonprofits are very basic.
- Some of the agencies have training programs specific to the services it offers, but the training is very expensive and involves long distance travel.
- Agency directors are very interested in more collaboration and communication between UW-Stout and the agencies and, also, agency-to-agency.
- Simon believes that computer training is the top training need and that it will be one of the needs identified as a result of the needs assessment.
- The UWDC is focusing on community building and partnerships.

Gupta identifies three critical success factors that must be present for the successful completion of a training needs assessment. They are:

- Support from senior management
- Buy-in from special interest groups
- Availability of personnel for data-gathering purposes

All three of the criteria are in place – Simon, the Board of Directors and agency directors support the research. Buy-in from the Board and the directors, coupled with the

enthusiasm and commitment of Simon will insure that time will be available for data collection.

### Population

The training needs assessment of the UWDC agencies was conducted during April and May of 2001. The population for the study consists of the (1) directors, (2) staff and (3) volunteers of the 2000 United Way of Dunn County Funded Agencies. There are 23 agencies divided into the following service categories: health, community service/advocacy, individual well-being, children and youth and self-sufficiency. All directors were included in the group to be interviewed. The maximum number of possible interviews was 23. A listing and description of each agency is attached to this report as Appendix B.

Determining the population of the staff and volunteers was problematic. Names, addresses and number of individuals resided solely within the individual agencies. And, a considerable number of the directors did not feel comfortable releasing lists of staff names and mailing addresses. The researcher was able to obtain the number of staff employed (including part-time and fulltime) by questioning the directors of 19 of the agencies. That number is 378. Arriving at an accurate number for the volunteer population was impossible. Directors, in almost every case, guessed at the number – volunteer resources are constantly changing. Some are active, and others inactive. The best guess by the directors was 1,374 volunteers.

The agencies were located not only in Menomonie (Dunn County) but also in Eau Claire, Wisconsin, and Minneapolis and Stillwater, Minnesota.

## Instrumentation

The method chosen to collect data for the assessment is the survey method, specifically, (1) a face-to-face interview with the agency directors and (2) a questionnaire to be mailed to each agency's staff and volunteers. Data collection using these methods occurred in April and May of 2001.

### The Interview.

The biggest benefit of face-to-face interviews is the human interaction that occurs. This method was purposefully selected so that the researcher could interact on a personal level with the agency directors. In addition to all of the benefits of face-to-face interviews mentioned in Chapter 2, another benefit the researcher hoped to be accomplished by this interaction was community building – a goal shared by both the UWDC and the university. Interviews are one of the easiest tools for gathering information about training needs. The structured interview format was selected. This required a formal set of objectives to guide the interview process. The number of questions was limited so that the interviews could be conducted in a maximum of one hour. Note taking was used to record responses.

The researcher conducted 18 face-to-face interviews. One director wrote the answers to the interview questions and faxed to the researcher. Attempts to schedule the remaining four interviews were unsuccessful due to time constraints of the directors. Prior to the interview, a sample of questions was faxed to each director. This enabled the directors to be somewhat familiar with the type of questions to expect during the interview process. The researcher traveled to each director's respective office location to conduct the interviews with one exception. One director traveled to UW-Stout to meet in

the researcher's office. Each interviewee was asked to read and sign a "Protection of Human Subjects Consent" form prior to the beginning of the interview. A variety of questions were asked, but the majority revolved around job duties, education, learning and performance. The same questions were asked of everyone. Only data pertinent to training needs will become a part of this report.

#### The Questionnaire.

Identical questionnaires were used to assess the training needs of (1) the staff and (2) the volunteers. A questionnaire was developed using some, but not all, of the face-to-face interview questions. Some of the questions provided data that the agency needed, and since this information is not relevant to the outcome of the assessment, it will not be made a part of the report. The open-ended questions required respondents to answer in their own words. This elicited in-depth responses, as opposed to limited responses. Questions were framed so that they could be answered easily. The number of questions was limited so that it could be completed in twenty minutes or so. Participation was anonymous and strictly voluntary. The time limit for returning the questionnaires was ten days. The questionnaire included a cover letter providing instructions for completing and returning the form and a "Protection of Human Subject's Consent Form" with no signature requirement. A self-addressed stamped envelope was also included.

The original intent of the study was to mail a questionnaire to each staff member and volunteer. As mentioned previously, many of the directors did not feel comfortable supplying this information. Without a population, this phase of the assessment could not be accomplished. It was decided to leave a supply of the questionnaires and envelopes to each agency director at the completion of the interview. The directors agreed to distribute

to the staff and volunteers. Completed questionnaires were to be individually returned in the envelope provided.

This compromise on the distribution of the questionnaires was disappointing to the researcher and would, without a doubt, impact the validity of this portion of the needs assessment.

### Analysis of Results

The data collected during the assessment process was analyzed using frequency distributions and statistics by question. Since the majority of questions were open-ended, all responses were recorded, like responses were grouped together, frequency of responses was determined and a corresponding percentage was calculated. The results are reported in the next chapter.

## Chapter 4

### Results and Discussion

#### Introduction

Data was gathered from the UWDC nonprofits at three levels – director, staff and volunteer. Face-to-face interviews were utilized to gather input from the directors. A questionnaire was used to survey the staff and volunteers.

Information was gathered from 19 of the 23 directors – a response rate of 82.6%. Three hundred seventy eight questionnaires were supplied to the agency directors for distribution to staff. Fifty-three were returned for a response rate of 14%. Although the number of volunteers within the UWDC agencies was loosely estimated to be 1,374, only 121 questionnaires were given to the directors for distribution. Seven of the agencies have volunteer bases so large and geographically dispersed (i.e. Girl Scouts of Indian Waters Council and Big Brothers Big Sisters of the Chippewa Valley) that it was unlikely that the distribution task could be accomplished. Nine volunteer surveys were returned. When the return rate is compared with the 121 that were made available for distribution, the response rate is 7.4%.

The results of the director assessment and staff assessment are presented and discussed in the remainder of this chapter. The volunteer response rate of 7.4% is unsatisfactory, and therefore eliminated from the discussion by the researcher.

#### Findings

Results of the face-to-face director interviews will be discussed first. A sample of the questions is attached to this report as Appendix A. The first five interview questions were of a general nature. When questioned about educational background, 58% indicated



completing 4+ years of college, 32% had completed four years and 10% high school only. When the 4 year and 4+ year groups are combined, 90% of the group in the sample has completed 4 years of college.

When asked if he/she had attended training during the last 12 months, 96% responded yes and 84% percent answered in the affirmative when asked about the existence of an individual plan for professional development. The researcher believes this indicates a belief and commitment on the part of a large majority of the directors to the value of training and lifelong learning.

Answers to the question, “how long have you held this position?” ranged from 4 months to 20 years, with an average length of 5.2 years. This result is skewed due to the fact that there were two vacant director positions and the people substituting answered this question with their individual information.

Of the 19 positions, 18 were paid positions and one was a volunteer position.

The next question asked the director to identify two of the main barriers to his/her individual success. Funding and time were identified as major barriers -- funding was cited by 13 respondents (68%) while time was indicated by 9 respondents (47%). This is no surprise – the researcher anticipated this result after the extensive review of the literature.

Factors that impede learning within the agency were the subject of the next question. Every director (100%) spoke of time and time-related issues as a major factor impeding learning. This, too, was not a surprise. Agencies are expected to do more with no budget to add needed positions. Funding was mentioned 4 times (21%). Fatigue,

noise, space issues, high stress levels and language barriers were items that were mentioned by a respondent.

When questioned about preferred learning styles, 79% preferred face-to-face; 79% chose hands on; 47% chose videotapes, and 42% chose computer tutorials/online training. Respondents had seven choices with an opportunity to use a blank to add other styles. Respondents could choose more than one style. This result seems in keeping with the level of technology use by many nonprofits. The review of the literature speaks of a digital divide that exists. It was unlikely that the nonprofits had the capability to produce or receive computer-based training and that personnel would have had previous opportunity to experience learning at a distance. Face-to-face learning is popular not only with the UWDC nonprofits. Training magazine, in a 39-page Industry Report 2000 states that nearly three-fourths of all courses are still taught face-to-face in classrooms. Statistically, hands-on learning equaled face-to-face learning with 79% of respondents also choosing that method

When asked whether or not she/he preferred to attend individual programs or programs as part of an on-going educational series, 38% prefer on-going series (depending on curriculum and if the subject will hold one's interest over the long term), 26% prefer individual programs, 26% had no preference (responded with "both"), 5% responded with "it depends", and 5% had no response.

When asked how much time each has available for training during the next twelve months, the answers ranged from 15 hours to 500 hours. The average of those who provided concrete numbers was 124 hours per year. One respondent wasn't sure, one didn't know and one could devote whatever time was necessary while one responded

“very little.” The researcher believes that this information may be distorted. Five hundred hours converts to 12 weeks or 62 eight-hour days. The average of 124 hours equals 3 weeks or 15 eight-hour days. These figures seem excessive, especially when considering that 100% of the directors listed time constraints as the major factor impeding learning.

Table 4.1 details the responses to the next question which asked the director to identify the most pressing training need for the position.

Table 4.1  
Most Pressing Training Need for Director Position  
As Identified by Directors

n=19

Response	Total	Percent
Grant-writing (nuts and bolts)	5	26.315%
Fund raising/fund development	2	10.526%
Technology/Access training	2	10.526%
No pressing needs	2	10.526%
Team building (participatory mgmt)	1	5.263%
Strategic planning	1	5.263%
Effective teaching methodology for clientele	1	5.263%
Title 1 of AODA Employment Provisions	1	5.263%
Contract management and development	1	5.263%
Financial	1	5.263%
Nutrition	1	5.263%
Adapting and functioning in an environment over which you have no control	1	5.263%

Grant writing was mentioned by 26% of the respondents as the most pressing need. Fundraising, technology training and no pressing needs are the next three needs most often mentioned. In two out of the four surveys discussed in Chapter 2, fundraising leads the list of most important training need. Grant writing was just behind fundraising in one of the surveys. Planning, management and marketing rounded up the top four in the other survey. In the third of the four surveys, technology was identified by 73% as the most pressing need. The fourth survey was totally focused on technology training needs. The top two needs identified by UWCD directors – grant writing and fundraising would appear to be common training needs of the nonprofit personnel.

The next two questions asked about the number of agency staff and volunteers. The total of all responses equaled 378 staff and 1374 volunteers. Support staff ranged from an agency with one to another with 180. Volunteer staff ranged from a low of 0 to as many as 350. This information was used by the researcher to calculate the number of survey copies to leave with each director.

When asked if the agency has a training budget, 84% (16) responded yes while 16% (3) responded no. A point the researcher overlooked that would add value to the research was to question the size of each agency's budget. The only conclusion we can draw from this question is that the majority of the UWDC agencies have a training budget but we do not have any information as to whether it is adequate.

When asked, "Do you think the current environment of the agency will support learning," 74 % (14) responded YES, 21% (4) responded NOT SURE/MAYBE and 5% (1) responded NO. These statistics show that, overall, training is supported by the UWDC agencies.

Next, the directors were asked to identify the number one training need for support staff. The information is provided in the Table 4.2 on the following page

Table 4.2  
 Number One Training Need for Support Staff  
 As Identified by Directors

n=19

Response	Total	Percent
Dealing with conflict/challenging behaviors	4	21.052%
Customer service	2	10.526%
Not sure	2	10.526%
Treating volunteers with higher regard	1	5.263%
Team building	1	5.263%
Diversity	1	5.263%
Grant writing	1	5.263%
Self-esteem	1	5.263%
Volunteer recruitment and retention	1	5.263%
Collaboration between units in agency	1	5.263%
Regulations (why we do the things we do)	1	5.263%
Early childhood education (psychology, language)	1	5.263%
Disability issues	1	5.263%
No support staff	1	5.263%

Dealing with conflict/challenging behaviors was cited as the number one training need for support staff (21%). The client base served by the nonprofits (see Appendix C) is diverse and underscores the validity of this response as the number one need. Customer service and “not sure” were the second and third most frequent responses (10.5% each). It is interesting that technology training did not appear once as a response, contrary to Simon’s understanding of training needs within the UWDC nonprofits.

The directors were also asked to identify the number one training need for volunteer staff. Table 4.3 lists the results.



Table 4.3

Number One Training Need for Volunteer Staff  
As Identified by Directors

n=19

Result	Total	Percent
Not sure	4	21.052%
None	3	15.789%
Communicating effectively	3	15.789%
Professionalism	1	5.263%
Child development	1	5.263%
Leadership	1	5.263%
Diversity	1	5.263%
Team building	1	5.263%
Job performance	1	5.263%
Working with other staff	1	5.263%
Familiarity with curriculum materials and use	1	5.263%
Working with addicted populations	1	5.263%

The responses to this question are puzzling at best. When asked the number one training need for volunteers, “Not Sure” (21%) was the answer given most often. A not sure response indicates that the directors are unaware of training needs. This could be the result of a lack of a day-to-day involvement with the volunteers. New directors with limited knowledge of volunteer operations could also have some impact on the result. None and Communicating Effectively responses were responses given with the same frequency (16% each).

Another question asked the respondent to rate the current knowledge and skill level of the staff and to also rate the volunteers using a scale of 1 to 10 with 10 being very knowledgeable and skilled. The staff averaged 8.2 while the volunteers averaged 6.5.

#### The Staff Assessment

Three hundred and seventy eight surveys were distributed to staff and volunteers. Fifty-three were returned (14%). As discussed in Chapter 3, only facts from the survey significant to the research objectives are reported here.

Table 4.4, on the following page, lists the results of the survey question that asked respondents to identify their most pressing training need.

Table 4.4  
 Most Pressing Training Needs As Identified By Staff  
 n=53

Results	Total	Percentage
Computer/technical/software	16	30.188%
Interpersonal communications skills	12	22.641
That it is useful/specific/complete	8	15.094%
Informational	5	9.434%
Effective staff management	1	1.886%
Law	1	1.886%
Advocacy	1	1.886%
Quality performance	1	1.886%
Customer service	1	1.886%
Becoming a trainer of Basic Leader Training	1	1.886%
Communicating better with those unable to speak clearly due to disease progression	1	1.886%
Learning how to assist and comfort clients	1	1.886%
Insurance changes	1	1.886%
Medical transcription	1	1.886%
Collections	1	1.886%
AODA	1	1.886%

The most pressing training need identified by the respondents was computer/technology/software (30%). Interpersonal communications skills (22%) was the second priority. That the training is useful, specific and complete (15%) was the third most frequent response. The researcher was seeking specific training needs, not generalities. The fourth most often response that training be informational (5%) was a non-specific response also. The desired results could have been more specific and valid if the question had been framed differently.

When questioned about preferred learning styles, face-to-face was the most popular choice at 37%; hands-on at 28%, workbook at 14% and videotape at 8%. Respondents had seven choices with an opportunity to use a blank to add other styles. Respondents could choose more than one style. Face-to-face and hands-on were also the two learning styles preferred by the directors.

Thirty-one respondents (58%) believe the current environment of the agency supports training, nine (17%) believe that it does not, and four (8%) are unsure. Nine (17%) did not answer the question. The majority of the directors also agreed that the current environment of the agency supports training.

When asked how much time could be committed to training in the next 12 month period, answers ranged from 6 to 150 hours. This amount seems more realistic than the data supplied by the directors.

Facts from the face-to-face interviews and the survey questionnaires that are important to the research objective have been reported in this chapter. A summary of the study with conclusions based upon the results of the study and recommendations will be the subjects of Chapter 5 that follows immediately.

## Chapter 5

### Summary, Conclusions and Recommendations

#### Summary

A training needs assessment of the United Way of Dunn County Funded agencies was the focus of this study. The study was conducted in five phases that included gathering preliminary data, planning, performing training requirements analysis, analyzing data, and preparing the report. The report consists of five chapters, references and appendices.

Preliminary data was gathered during meetings with the director of the Dunn County United Way, a presentation to the Board of Directors and by conducting a review of the literature. Objectives and outcomes were formulated and instruments designed. Face-to-face interviews were scheduled and completed with 19 of the total population of 23 directors. Questionnaires were distributed to 378 staff and 121 volunteers. The results were tabulated and recorded. The data was then analyzed and this report was prepared using a descriptive format and tables were created to display some of the data.

#### Conclusions

The researcher and university benefited from the study. The researcher, by conducting face-to-face interviews, was able to meet most of the people in the community (and some in other communities) who are directing the nonprofit activities and to become acquainted with the services available and clients served. The researcher believes the activity was a community building one. The university's efforts to become involved in the community were areas of interest to the Malcolm Baldrige National Quality Award committee. Members of the committee discussed the study with the

researcher during a site visit in 2001. The researcher regrets that an interview question was not framed around the importance of community building and partnerships to the nonprofits.

An analysis of the data allows the following conclusions to be made:

1. Grant-writing was the most pressing training need identified for directors by directors. Fundraising was second. The review of the literature adds credence to the validity of these statistics.

2. Computer/technical/software skills were the most pressing training need s identified for staff by staff. Dealing with conflict and challenging behaviors was the most pressing training need identified for staff by directors. A discrepancy exists between the director's perception and the staff's perception of the staff's most pressing training need. The staff's perception is more valid than the director's perception.

3. The objective to assess the training needs of the volunteers was not accomplished. The researcher lost any control over the distribution of the questionnaire and the response rate was minimal. Even the directors were unsure what the number one training need was for volunteers.

4. The state of training within the UWDC nonprofits is not as bleak one might expect after reading the review of the literature on the subject. Ninety-six percent of the directors have attended training in the last 12 months; 84% of the agencies have a training budget and 74% of the directors and 58% of the staff believe the current environment of the agency supports training. And the majority of both groups believe they have time to devote to training in the next year (whether the time is ample is unclear).

5. The top two learning styles preferred by the directors and staff are the same – face-to-face and hands-on.

6. Time constraints and funding are the major issues that are impede learning. These issues plague nonprofits not only in the area of learning and training but also at every level of operation

### Recommendations

The following recommendations are related to the study and to future research in this area.

1. A more in-depth focused survey should be conducted by the individual agencies to assess the training needs of volunteers.
2. A reoccurring theme in the interviews was the time and dollar commitment required by training events. Conversations confirmed that each director wears many hats and constantly deals with time and workload issues. These same issues affect the support staff and volunteers. Participants in training must feel that the investment in training is worthwhile. Therefore, it is imperative that the training be effective.
3. The ability to fund an agency is critical. Two of the training deficiencies identified by agency directors relate to revenue generation – grant writing and fundraising. Because of the potential impact to agencies and staff, these appear to be the two most pressing training for agency directors.
4. Technology training was a priority identified for both directors and staff. Interpersonal communications skills training was identified as a need for

staff and volunteers. Training to address these needs should be scheduled as soon as possible.

5. The participants in this assessment rated face-to-face delivery of training and hands on training as preferred methods. These preferences should be considered when scheduling training.
6. To defray the cost of training, it is suggested that the UWDC agencies look to the universities, technical colleges and communities to locate subject matter experts who believe in giving back to the community. A plan should be formulated to identify and then contact these potential volunteer trainers. Do not overlook the possibility that there are skilled staff in positions within the nonprofits that have expertise in those areas where training deficiencies exist.
7. Because training needs change with time, this study should be replicated every 2-4 years to detect emerging patterns.

The need for training was acknowledged by the participants in this assessment as was the perception that each agency supports and will support future training opportunities. This support needs to be expressed in action – the agencies need “training champions” to create enthusiasm and spearhead initiatives. Perhaps champions already exist. If so, they should be identified and incorporated into a group. The desired outcome is a sustainable, enduring training program for the nonprofits. Cultivating leaders who are excited about training opportunities will strengthen efforts and maintain momentum over the long term.



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APPENDIX A

Face-To-Face Interview Questions

## INTERVIEW QUESTIONS - DIRECTORS

Name \_\_\_\_\_

Agency \_\_\_\_\_

Date \_\_\_\_\_

What is your educational background?

HS    2 yrs college    4 yrs college    4+ yrs college

Have you attended training in the past 12 months?

Do you have an individual plan for professional development?

How long have you held this position?

Is your position a volunteer or paid position?

What are the main barriers to your success?

What factors impede learning within the agency?

What are your preferred learning styles?

\_\_\_    Face-to-face workshop

\_\_\_    Just-in-time

\_\_\_    Hands-on

\_\_\_    Computer tutorials/online

\_\_\_    Audio recordings

\_\_\_    Videotapes

\_\_\_    Workbook

\_\_\_    Other – please explain \_\_\_\_\_

Do you prefer to attend individual programs or programs as part of an on-going educational series?

Realistically, how much of your time can you commit to training in the next 12-month period?

What do you perceive to be the most pressing training need for your position?

How many staff does the agency employ? (Include full and part time)

How many volunteers do you maintain on a regular basis?

Does your agency have a training budget?

Do you think the current environment of the agency will support learning?

What do you see as the number one training need for the support staff?

What do you see as the number one training need for the volunteer staff?

On a scale of 1 to 10 how would you rate the current knowledge and skill level of your staff?

Volunteers?

APPENDIX B

List and Descriptions of 2000 United Way  
of Dunn County Funded Agencies

**American Red Cross**

Providing disaster relief, military communications, blood services, international tracing and health and safety education when Help Can't Wait.

**Chippewa Valley Health Clinic**

Providing medical and health-related services at low or no-cost to individuals whose access to medical care is limited.

**Chippewa Valley Ostomy Association**

Aids in the rehabilitation of a person who has had or will have an ostomy by providing information and encouragement necessary for a continued healthy and productive life.

**Dunn County Medical First Responders**

Responds to medical emergencies and accidents in rural Dunn County providing initial medical intervention until ambulance, law enforcement or fire fighters arrive.

**Northwest Wisconsin Homecare (Hospice Program)**

Provides specialized interdisciplinary home health care for terminally ill patients and their families so that they can live as fully and comfortably as possible.

**AIDS Resource Center of Wisconsin**

Conducts community education programs on HIV prevention. Provides programs and services to people living with HIV disease, enabling them to remain healthy, independent and productive for as long as possible.

**The ARC**

Serving people with cognitive disabilities and/or genetic conditions through advocacy and direct services.

**Courage Center**

Serving people with physical disabilities and sensory impairments.

**Epilepsy Foundation of Western Wisconsin**

Provides education programs, information and referral, advocacy and services to people with epilepsy and their families.

**First Call for Help and Family Resource Center**

Provides information on public, private nonprofit and private for-profit agencies serving a wide variety of human service needs. Serves as a hub for information on parenting programs, activities and resources to assist and support families throughout Dunn County.

**Arbor Place**

Recognizes chemical dependency as a treatable illness and provides the following services: prevention through education, intervention, primary and secondary outpatient counseling and residential treatment.

**The Bridge**

Offers crisis intervention, emergency shelter and ongoing counseling for victims of domestic abuse and sexual assault.

**Dunn County Interfaith Volunteers**

Provides short-term care for the frail, elderly and people of differing abilities through an interfaith volunteer network. Includes the House of Hope homeless shelter in Menomonie and the Interfaith Food Pantry.

**Lutheran Social Services**

Provides personal, chemical dependency, sexual abuse and birth parent counseling.

**Big Brothers Big Sisters of Chippewa Valley, Inc.**

Providing mentoring and other services to children ages 5-17 through caring adult volunteers.

**Girl Scouts of Indian Waters Council**

Providing a contemporary program to girls ages 5-17 on developing self-potential and values.

**Positive Alternatives**

Supports residential programs for adolescents termed delinquent or who are in need of protective services, the Teen Care Runaway Program, which offers 24 hour temporary shelter, youth and family counseling, and the area Safe Place.

**Center for Independent Living**

Serves people with disabilities, empowering them to access community offerings fully. Provides ADA implementation assistance to businesses and organizations.

**Consumer Credit Counseling Service**

Educating the public on budgeting, debt repayment and use of credit.

**Hmong American Community Association**

Provides a variety of services to the Hmong community.

**Literacy Volunteers of America-Chippewa Valley**

Helping adults improve their reading, writing and employability skills.