



**Technical Assistance  
to the Strengthening of Strategic Planning  
Capacities  
in Selected Ministries in Lebanon**

**ENPI/2014/349-155**

**Report on Activity 1.3.  
Training Needs Analysis**

**February 2015**

**The opinions expressed in this report are the sole responsibility of the author and can in no way be considered to reflect the views of the European Union**

# REPORT

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## 1. INTRODUCTION

### Purpose and outputs

1.1 The purpose of this training needs identification (TNI) and analysis (TNA), carried out between 19<sup>th</sup> and 30 January 2015, is to make an assessment of the skills and knowledge capacities of the designated Strategic Planning Teams in Ministries of Industry, Public Health, Social Affairs and Tourism, together with the 'Help Desk' Team from OMSAR, in relation to their newly created roles in the development of strategic plans for the four named ministries.. In particular it will address the capabilities required at each stage of the strategic planning process, ultimately enabling each team to facilitate the development of strategic and operational plans for their own ministry, with the support of the OMSAR 'Help desk' Team.

1.2. The newly formed teams will not only be required to implement the mechanics of strategic planning in their respective ministries, they will also have to develop a range of communication and inter-personal skills to enable them to involve and engage all decision makers within their ministries, plus all other stakeholders, internal, sectoral and external, if their strategic plan is to be credible realistic and effective.

1.3. The outputs of the TNA are:-

- Recommendations on the length and content of initial training modules which will provide the knowledge and skills required to research format and construct and effective strategic plan
- a training plan to deliver the initial phase of training during April May and June 2015
- recommendation on a range of training interventions which may be required later in the process of constructing strategic plans for each ministry
- individual results of questionnaire which each staff member can use, with his/her line manager, to develop personal training and development plans.

### Scope

1.4. The target group for the training needs analysis consists of the members of the four ministry strategic planning teams, plus the OMSAR 'Hep Desk' Team, Annex 1 The aggregated results of the TNA are in **Annexes x to x**, and the commentary is in the main body of the report.

## 2. METHODOLOGY

### Target groups and methods

#### The initial or primary identification of training needs.

2.1. The source of the training need is contained in the Terms of Reference (ToR) for the project Technical Assistance to the Strengthening of Strategic Planning Capacities in selected Ministries in Lebanon and, more specifically, in Result 3 and its related activities.

Background information relevant to the TNI was provided in the research and analysis done by the Team Leader as part of the activities related to Result 1 of the ToR.

Below is a summary of the key findings from the Team Leader's report:-

Current situation -analysis of the main findings

- ❖ no systematic strategic planning of any kind;
- ❖ strategic documents produced not fully fledged plans.
- ❖ lack quantitative analysis to serve as base line, or check against resources.
- ❖ The priorities have not always been defined clearly.

- ❖ documents have no official status.
- ❖ no role in the preparation of the budget, nor HRM&D; not guiding for programmes in data gathering and analysis or research.
- ❖ sometimes gives verbal analysis not always supported by data,
- ❖ they identify needs and actions to be taken but generally no set priorities
- ❖ do not estimate the cost of activities, or assess if means available

### **The secondary or detailed identification of training needs.**

2.2 The subsequent plan and methodology for the collection of information on training needs was based on the size of the Strategic Planning and 'Help Desk' Teams and the diversity of roles and functions within them, in the context of the resources available. The size and diversity of function of the total target group, approximately, 36 people, meant that it was both practicable and appropriate to collect training needs information from each target group member, rather than from a representative sample.

The fact that significant number of the target group hold junior posts and that, for most, the process of strategic planning involves them in new roles indicated the need for a detailed and structured self-assessment, diagnostic instrument to stimulate the identification of needs. A questionnaire and group interviews were selected as appropriate methods of data collection.

2.3 The design of the questionnaire (Annex 1) was based on:-

- discussions with Team Leader based on his documentary research and discussions in 4 ministries to date.
- discussions with Mr Andre Amiouni, OMSAR
- discussion with Mr Samer Hankir of OMSAR
- expert knowledge of GFA consultants relating to their subject areas

### **Process.**

2.4. Meetings were arranged in each Ministry with the Strategic Planning teams and with the 'Help Desk' Team, during which brief presentations were made on the project activities and on the proposed training programme. Not all team members were able to attend due to operational constraints or illness.

Mr Andre Amiouni attended the 'Help Desk' Team meeting and the meeting with the Ministry of Industry. Two 'Help Desk' Team members, Mr Josef Tabet and Mrs. Ibtissam Haber attended the meetings with Ministry of Social Affairs and Ministry of Tourism and assisted non- English speakers in completing the questionnaires. The Director General of Ministry of Tourism, Ms. Nada Sardouk also attended briefly, indicating her interest in and support for the project.

2.5. The presentations provided the opportunity for the Team members to ask questions and to offer thoughts on training that they thought might be of use, which proved to be a useful source of information. The team members were assured of the confidentiality of the results of the training needs analysis and that the results would be published only in an aggregated format.

The questionnaires were completed and taken away after the meeting for analysis. a total of 30 questionnaires have been received and analysed.

2.10. The final training recommendations are based on the findings of the Primary and Secondary diagnosis of needs, including discussions with Mr Andre Amiouni the responsible senior manager at the sponsor Ministry, OMSAR.

### **3. FINDINGS AND CONCLUSIONS**

3.1. The aggregated and analysed data relating to the questions in the questionnaire which required a narrative response are found at **Annexes 3 to 8**.

#### **3.2 Comments on the responses to Questions 7 & 8**

**‘Please list all of the training that you have received while working in the Ministry of .....’  
& ‘Did you take part in the Change Management Training programme provided recently through OMSAR?’**

The responses to Question 7 were sifted and only topics with a relevance to the strategic planning process are listed.

The distribution of training relevant to the strategic planning process is uneven and concentrated amongst a minor percentage of the target group.

5 of the respondents attended a 3 day Management of Change programme, provided through OMSAR.

#### **Conclusions**

For a minority of the participants there may be some repetition of previous training in the proposed programme, but, for the majority, both the initial and advanced training will be relevant, and a focus on their own work environment will add a new perspective for all.

Only five of the 30 respondents received training in management of change and it is therefore appropriate that change issues are addressed throughout the programme and integrated with relevant stages of the strategic planning process.

#### **3.3 Comments on the responses to Questions 9**

**‘What information did you have, before coming here today, about your role as a member of the Strategic Planning Team?’**

9 of the responses indicate that no information had been given prior to attending the diagnostic meeting and completion of the questionnaire.

Other responses are mixed, with a few (mainly the co-ordinators) indicating a good understanding of the proposed role.

#### **Conclusions.**

The briefing provided to a large percentage of the teams’ members was either non-existent or inadequate. It could indicate either a lack of knowledge and understanding of the team members’ roles or a lack of commitment to the whole process on the part of line and senior management. Communication is vital to the success of the strategic plan development and Line and Senior management of the team members must be brought into the process and helped to understand their roles and contributions and the importance of releasing team members for training and for the later stages of plan development.

#### **3.4 Comments on the responses to Questions 10 and 11**

**‘ How do you feel about establishing and developing your new role as a member of the Strategic Planning Team?’ &**

**‘What interests you about taking on this role?’**

A high percentage of the responses are enthusiastic and display an understanding of and belief in the strategic planning process and a commitment to taking part in it, both from the point of view of contributing to Lebanese development and of developing their own range of knowledge, skills and experience. Many express their interest in working with a wider range of colleagues than they do currently and in engaging with a range of stakeholders externally.

### **Conclusions.**

These responses are very positive and indicate a highly committed and cooperative target group, which bodes well both for the training and for the subsequent practical planning phase. It also makes it very important that the concerns outlined are fully, continuously and vigorously addressed so that the team contributions can be optimised.

### **3.5 Comments on the responses to Questions 12 & 13 ‘Do you have any concerns about undertaking this role? This includes any type of concern in addition to the need for the knowledge and skills of the strategic planning process?’ & ‘If you do have concerns please will you list them, so that we can try to deal with them as part of the training programme?’**

7 respondents replied ‘none’ or left the space blank, which implies that the remaining 23 (77%) respondents do have concerns.

The concerns fell mainly within 3 categories:-

- ❖ the highest number of concerns relate to acceptance and implementation of the plans within Ministries and by other relevant stakeholders and to the fear that the work will be for nothing.
- ❖ the second category of concerns relates to fears that pressures of work will interfere with time allowed for both attendance at training and working on the development of the plan.
- ❖ the third category indicated worries about insufficient levels of existing knowledge skills, experience and training and the ability of the training programme to meet their needs.

A number of the target group verbally expressed concerns about the planning of training, indication that all interventions need fall within working hours and should avoid blocks of time away from normal duties.

### **Conclusions**

The first two categories of concern show that the project consultants and its key stakeholders need to be continually active in promoting and explaining the purpose, processes and intended outcomes and benefits of the implementation of the strategic planning process, and also in identifying key players in each ministry and maintaining frequent communications with them.

A highly active, structured and persistent communications and influencing campaign will need to be in place throughout the lifetime of the project. The OMSAR ‘Help Desk’ Team together with sector experts will play a key role in the influencing strategy, once they become involved in early June 2105, with the Team Leader and KE2 also playing an active role.

The training plan should, as far as possible, reflect and respond to the concerns about release by managers and ministries to attend training by minimising disruption to normal work patterns. To allay the fears of strategic planning team members about their competence (third main category of concern) it is important that the training is comprehensive and above all practical. Partial attendance cannot be contemplated.

Certification of target group members participation in the project activities should be dependent on their attendance at training and participation in subsequent planning activities

### 3.6 Aggregated results of questions 14 to 33.

Below is a chart summarising the aggregated responses to the two series of questions, 14 to 21 and 22 to 33, which asked for the views of the strategic planning teams the importance of specified skills and knowledge topics to strategic planning and their self assessment of their needs in relation to these topics.

	Topic	Percentage of respondents who considered this topic to be either 'Mostly ' or 'fully' relevant to strategic planning	Percentage of respondents who assessed themselves to need either initial & advanced training or advanced training in this topic
14	What is strategic planning?	83%	89%
15	Why is strategic planning important to Ministries?	85%	97%
16	What are the stages of the strategic planning process?	76%	94%
17	What happens at each stage of the strategic planning process?	69%	96%
18	What are the key tools that can be used in the strategic planning process?	78%	96%
19	How do the key tools work in practice?	66%	97%
20	What are the key roles in the strategic planning process?	76%	97%
21	What elements does an effective strategic plan contain?	71%	97%
22	Skills and techniques to collect, analyse and interpret data	90%	89%
23	Development and application of a consultation process	86%	93%
24	Techniques to generate new ideas	89%	93%
25	Project design and management skills	86%	89%
26	Communicating effectively with senior managers and stakeholders	89%	85%
27	Clear expression of ideas	97	75
28	Briefing skills	100	82

29	Active listening	100	87
30	Influencing and negotiating skills	85	89
31	Problem solving techniques	100	89
32	Developing the role of 'Change agent'	86	97
33	Change implementation and management techniques	<b>83</b>	<b>93</b>
	<b>Average</b>	<b>84.75%</b>	<b>91.2%</b>

### 3.7 Conclusions

The responses to self assessed training needs, averaging 91.2 % and ranging from 97% to 75% requiring advanced or initial plus advanced training in the named topics indicates that training in the topics listed will be new knowledge and skills for most of the participants and that the degree of 're-training' that may occur is unlikely to be significant.

Less consistently high percentages in the section on the relevance of certain topics, with 84.7% (ranging from 100% down to 66%) viewing the topics to be fully or mostly relevant, is likely to represent a lack of understanding of the topic itself or of the processes involved in strategic planning because all of the topics are relevant., This highlights a need for the training to draw clearly the links between each topic and its role in strategic planning process.

### 3.8. Other findings arising from discussions with all stakeholders.

As a result of meeting key stakeholders, both within the project and OMSAR plus a high percentage of the training target groups from the ministry teams and the OMSAR Help Desk Team, additional potential training issues and other topics were identified and discussed. These are listed below.

#### For OMSAR 'Help Desk' Team

- ❖ Observational techniques
- ❖ Coaching skills
- ❖ The role of the consultant and the process of consultancy.

#### Ministry teams

- ❖ Team working skills
- ❖ Presentational skills
- ❖ Negotiating and influencing skills may have to be expanded on after the initial, initial training phase.

#### Ministries + OMSAR

- ❖ The role of the Change Agent in the context of other roles
- ❖ Techniques for introducing change successfully.

#### Sector experts

- ❖ Coaching skills

#### Conclusion.

These training issues should be assessed and where appropriate included during the lifetime of the project.



The issue of certification for the initial training and subsequent practical work was raised and proposed. It was indicated that certification would be an incentive to target group members to attend and participate fully in the entire process.

#### **4. RECOMMENDATIONS.**

4.1 An initial phase of training is proposed to take place between 27 April and 11 June as shown in Annex 9.

#### **4.2. Recommendation 1**

This recommendation is for a initial training programme of 32 hours in ‘The Strategic Planning Process’, for a target group of 34 participants from 4 Ministries and OMSAR. The target group will be split in to 2 equal groups and there can be no movement between groups; once allocated to a group, each participant will remain in that group for the duration of the initial programme.

In response to concerns widely expressed by target group members (3.5), it is proposed that for the initial programme for 4 Ministry Teams and OMSAR the training takes place

- ❖ in sessions of 4 hours, from 09 30 – 14 00 (allowing for a short break if training starts on time)
- ❖ on 2 alternate days per week for each group, either Monday +Wednesday or Tuesday + Thursday, thus avoiding consecutive days’ absence
- ❖ for 4 weeks, 3 weeks consecutively and the fourth week after a break of one week.

Events 1a to 8b in Annex 9 relate to the above initial training.

The content of the initial training programme will be based on the ‘Manual on Strategic Planning’ especially adapted by the Team Leader, and the practical training will focus on the ‘Toolkit’ which accompanies the manual and contains models, techniques and examples to help the practical process of developing a strategic plan. The manual will provide the background narrative and the process description on which the strategic planning process in the ministries will be based. The ‘Toolkit’ will provide a basis for practical exercises to apply the strategic planning process both in the classroom and in the subsequent application phase in the ministries.

The training methodology will be interactive, facilitative and experiential.<sup>1</sup>

#### **4.3 Recommendation 2**

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<sup>1</sup> In the training context:-

**Facilitative** means to make easier ;to assist the progress of learning.

**Interactive** means that the participants will not sit passively, listening to lectures but will actively participate in the learning process

**Experiential** means that past experiences will be brought into the learning process and new experiences will be provided through learning activities

This proposes one, 4 hour 'Team Building' event for each Ministry team, with 2 ministries attending each event, together with the sectoral experts and the allocated OMSAR Help Desk partners, during the week 1-4 June, encompassing practical activities to promote team understanding and development

The training methodology will be interactive, facilitative and experiential

#### **4.4 Recommendation 3**

A Workshop to bring together sectoral experts and key ministry departmental heads and managers.

8 hours June 9 & 11 are proposed for this event.

#### **4.5 Topics to be covered in each event**

Annex 10 outlines shows what each training intervention will cover.

#### **4.6 Recommendation 4**

One session for OMSAR Help Desk Team in 'Observation Techniques' to enhance their participation in the first practical phase of the strategic planning process with their allocated sector expert and Ministry Team. It is proposed that this event takes place in the autumn. The training methodology will be interactive, facilitative and experiential and will prepare OMSAR team members to work, with their allocated ministry team, in a structured way.

#### **4.7 Recommendation 5 on other training needs identified**

Paragraph 3.8 lists a number of potential training needs in addition to the topics included in Annex 10, some of which will be wholly or partially integrated into the initial training programme, with the remainder (below) being reviewed in the autumn on the basis of available resources and their relevance, developed and delivered at appropriate intervals during the construction of the strategic plans

The training methodology will be interactive, facilitative and experiential the content of proposed training in addition to those outlined above

#### **OMSAR**

The role of the consultant and the process of consultancy. 8-12 hours, covering

- ❖ the consultancy role
- ❖ entry, contracting diagnosis
- ❖ intervention strategies
- ❖ evaluation
- ❖ withdrawal

Coaching skills. 8-12 hours covering

- ❖ a systematic approach to coaching
- ❖ the role of the coach
- ❖ the skills of the coach
- ❖ objective setting

- ❖ feedback

### **Ministry teams**

Presentation skills 8-12

- ❖ structuring and preparing a presentation
- ❖ techniques for engaging the audience

Negotiating and influencing skills 4 basic + further 4 hours for role play

- ❖ what is a negotiation
- ❖ systematic approach
- ❖ planning and preparation
- ❖ negotiating styles

### **4.8. Recommendation 6**

To address the findings and conclusions that indicate that ministry managers and decision makers have not, in some cases, become engaged in the strategic planning initiative, the project team, including the sectoral experts when they arrive, should develop a structured communications strategy and plan to ensure that all key decision makers in ministries are not only kept informed of the planning process as it takes place but are also drawn into involvement.

### **4.9 Recommendation 7.**

An Attendance Certificate should be provided to the participants of the initial training programme on the process of strategic planning. The certificate will only be awarded for full attendance.

A second certificate should be awarded for full participation in the preparation of a ministry Strategic and Operational plan, on completion of the final documents.

Both certificates should describe precisely the activities undertaken.

## ANNEXES TO TNA REPORT

- ANNEX 1 List of Ministry and OMSAR team members
- ANNEX 2 Blank Questionnaire
- ANNEX 3 Target Groups' responses to Q7 & Q8
- ANNEX 4 Target Groups' responses to Q9
- ANNEX 5 Target Groups' responses to Q10
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- ANNEX 7 Target Groups' responses to Q12 & Q13
- ANNEX 8 Target Groups' responses to Q14- 33
- ANNEX 9 PROPOSED TRAINING PLAN
- ANNEX 10 PROPOSED TRAINING CONTENT
- ANNEX 11 SUMMARY OF DAYS OF TRAINING PER TARGET GROUP -MINISTRY SP  
TEAMS, OMSAR AND MINISTRY MANAGERS

## ANNEX 1

## List of Ministry and OMSAR team members

Name	Ministry	Title	Project Role
Antoine Romanos	MOPH	head of licensing	SP coordinator
Lina Abou Mrad	MOPH	head of ICT	SP coordinator
Hilda HARB	MOPH	Head of Statistics	SP team
Naaman Frangieh	MOPH	Head of Finance	SP team
Khaled Seifeddine	MOPH	Head of Personnel	SP team
Inaya GHOSON	MOPH	Head of Administrative	SP team
Joumana el Hashem	MOI	Head Admin (Diwan)	SP coordinator
Bassam Jouni	MOI	Economic Researcher, Dept Studies	SP team
Alaa el dine Al Hajjar	MOI	Analyst & programmer, Dpt Industrial Information	SP team
Maroun Mansour	MOI	Economic Researcher, Dept Studies	SP team
Ali Chehimi	MOI	Head Dept Ind. Licensing	SP team
David Wakim	MOI	Eng, Dept Licensing	SP team
Sayed Bou Diab	MOI	Head Dept Technical Industrial Services	SP team
Youssef Bteich	MOI	Engineer, Dept Technical Industrial Services	SP team
Maryam Mghames	MOSA	Head Section Inhabitants	SP coordinator
Georges Aida	MOSA	director of social development	SP team
Nada Fawaz	MOSA	head of social welfare	SP team
Adel el Chabab	MOSA	Expert	SP team
Hiam Sakr	MOSA	head of specialized welfare	SP team
Adnan Nasr el Dine	MOSA	head of technical affairs	SP team
Manal Naim	MOSA	database administrator	SP team
Joumana Kabrit	MOT	Hd Administrative Affairs	SP coordinator
Wafa Aouad	MOT	Hd Section Accounting	SP team
Gilbert Zayyo	MOT	Hd Section G'eita Grotto	SP team
Elie Hamouda	MOT	Hd Section Research and Documentation	SP team
Pele Abou Abbas	MOT	Hd Section Techn. Studies & Implem.	SP team

Doha Khanafer	MOT	Clerk Statistics, Dept Studies	SP team
Roula Abbas	MOT	Clerk, Sect Staff Affairs	SP team
Mr. Wissam Abou Shakra	OMSAR	policy analyst	Help Desk
Mrs. Adeeba Barq	OMSAR	policy analyst	Help Desk
Ms. Aline Saadeh	OMSAR	Procurement Officer	Help Desk
Mrs. Ibtissam Haber	OMSAR	Head of studies and Projects Centre	Help Desk
Mrs. Laudy Rahme	OMSAR	BPR Team member	Help Desk
Mr. Joseph Tabet	OMSAR	DAWLATI Content Management Team	Help Desk

ANNEX 2 Questionnaire for Strategic Planning Teams and 'Help Desk' Team

**TRAINING NEEDS ANALYSIS QUESTIONNAIRE FOR STRATEGIC PLANNING TRAINING PROGRAMME. January 2015**

The purpose of the questionnaire is to contribute to the design of the training that is to be provided to support the Manual on Strategic Planning and your role in the strategic planning process.

By answering the questions, you will provide information which will enable the designer of the training to reflect accurately your needs and existing levels of experience in the training contents and methodology.

The first part of the questionnaire asks for facts about you and for your thoughts on the new role.

The second part of the questionnaire asks you to assess the usefulness of certain topics in the context of strategic planning.

The responses to the questionnaires are confidential and you do not have to complete the answer to questions 1 if you do not wish to do so.

If the spaces provided are too small for your answers, please use extra paper.

Please answer all other questions. Part One

1. Name
2. How long have you worked at the Ministry of Industry?
3. What department do you work in?
3. What is your job title?
4 How long have you worked in this job?
5. What are the main tasks and responsibilities of your job?
6. What other posts have you held in Ministry of Industry and for how long did you hold each post?
7A. Please list all of the training that you have received while working in the Ministry of Industry.
7B Did you take part in the Change Management Training programme provided

recently through OMSAR?

9. What information did you have, before coming here today, about your role as a member of the Strategic Planning Team in Ministry of Industry?

10. How do you feel about establishing and developing your new role as a member of the Strategic Planning Team in Ministry of Industry?

11. What interests you about taking on this role?

12. Do you have any concerns about undertaking this role? This includes any type of concern in addition to the need for the knowledge and skills of the strategic planning process?

13. If you do have concerns please will you list them, so that we can try to deal with them as part of the training programme?