



2004 Strategies – People Focus

Step 5: Determining Employee Training & Development Needs, Including Those Related to Employee Health Matters

Ensuring individuals at all levels of your organization have the right skills to perform their work is integral to both a healthy workplace and to meeting your organization's overall business goals. A solid business plan/healthy workplace plan will identify the human resource capabilities needed and address how training gaps (gaps between skills employees currently hold and those they need) are identified and resolved.

A good training and development strategy has continued support through the allocation of sufficient resources and ensures that training is provided to the individuals who need it, in a timely fashion.

A healthy training/development strategy will focus on both enhancing job skills and the development of skills on what it takes to create and sustain a healthy workplace.

Example components of a healthy training & development strategy:

- Management training is provided on the organization of work as it relates to employee and organizational stress (i.e. demand-control model of job stress).
- There is follow up support for these managers as they implement strategies in their departments based on the training they receive.

Evaluation of your organization's training efforts is just as important as the training/development strategy itself. A good evaluation framework will enable you to determine if the training/development strategy is achieving its intended goals.

Consider addressing the following aspects in your evaluation:

- Gather feedback from employees about the current level of training and its effectiveness
- Measure the effectiveness of the training/development strategy at improving departmental and organizational outcomes
- Look at how training has resulted in improved work practices

Tips:

- Leadership commitment and support is key to any training and development strategy. Get leaders involved in the training process in both a formal and informal way. For instance, leaders can coach others in the workplace or act as mentors, by walking the talk. In relation to healthy workplace practices, the latter would involve adhering to and supporting human resource policies that relate to workplace health.
- Identify opportunities for training and development through the performance review process.
- Encourage employees to attend courses that build on their job skills.
- Provide employees with adequate training that provides them with a good knowledge of what it takes to create a healthy workplace.



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- Make arrangements with academic/training institutions to provide training that meets your organization's needs.
- Provide assistance [financial, time, encouragement] to employees who pursue personal development.

Workplace Health In Action – *Envision University at Envision Financial*

[Envision University](#) began in 1994 with a dream and a team of two. Because the strategic plan for Envision Financial includes, as one of its critical success factors (CSF), the area of “Leadership and Learning”, the corporate university concept was tabled as a top priority.

Recognizing that Canada is moving into an era of skills shortage, [Envision Financial](#) identified the Leadership Development plan as high-level priority and charged Envision U as the vehicle to meet this need.

Through partnering with outside universities, planning with senior management, and the need to deliver training in an ever-increasing efficient manner, it has evolved into Canada's first fully articulated, and internationally recognized, corporate university.

The web-based form of delivery ensures that the self-sustaining Employee Development business unit delivers and contributes to the bottom-line efficiency of Envision Financial. Through more efficient operations and outside sales of its technology, Envision U is an integral member of the revenue-producing team at Envision Financial.

The core strategies of Envision U include:

- Supporting continuous learning through employee knowledge and skills development
- Developing and implementing a comprehensive performance management system.
- Implementing an employee selection and retention strategy and,
- Developing opportunities and programs to assist with career planning and advancement.

As reward for its passionate pursuit of excellence, Envision U has enjoyed international recognition as a leader in the industry. Some of the rewards that Envision U has achieved are:

- Being recognized as one of the **50 Best Employers in Canada** by the Report on Business for 2003 and 2004.
- Being recognized as one of the **Top 100 Companies to Work for** in *MacLean's Magazine*.

Read more about Envision University on the next few pages.

Envision University

“The Future of Education is Now!”



What is Envision University?

[Envision University](#) began in 1994 with a dream and a team of two. Because the strategic plan for Envision Financial includes, as one of its critical success factors (ESF), the area of “Leadership and Learning”, the corporate university concept was tabled as a top priority.

Recognizing that Canada is moving into an era of skills shortage, [Envision Financial](#) identified the Leadership Development plan as high-level priority and charged Envision U as the vehicle to meet this need.

Through partnering with outside universities, planning with senior management, and the need to deliver training in an ever-increasing efficient manner, it has evolved into Canada’s first fully articulated, and internationally recognized, corporate university under the direction of Envision U architect, [Carol Hama](#). Currently it supports a dedicated staff which includes specialists in Career Planning, eLearning, Lending, Wealth Management and Team Building.

Envision U is supported by technology through a comprehensive website featuring Learning and Performance Management systems. The site, comprised of seven key areas, features tools for staff development and management functions.

1. **“Plan your Learning”** which includes the ability to
 - View details of any position in the company
 - Run a “Gap Analysis” – analyze which courses you need to fulfill your position
 - View your transcript
 - Add a course to your transcript
 - Request a “Learning Map Evaluation” – self-assess your skills on your position requirements.
 - Personal assistance tools such as
 - o Resume construction
 - o Interview techniques
 - o Career-planning resources
2. **“Curriculum”** which includes
 - Complete listings of
 - o Classroom courses available for all credit union and insurance staff
 - o Prework for all courses
 - o A comprehensive resource library for staff containing CDs, books, videos etc for career or personal advancement.
 - Centres of Knowledge for
 - o Health & Wellness
 - o Insurance
 - o Lending
 - o Wealth Management
 - o Quality
 - o Operations etc.



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3. **“e-Learning”** which includes
 - Complete listing of eLearning resources available
 - eLearning materials and equipment for sign-out
 - Computer and Web-based training programs accessible anywhere, anytime
4. **“Register”** for a Course which includes
 - Full calendar of all internal and externally offered courses
 - Ability to register directly for a course
 - Option to be placed on a wait-list for courses and receive automatic notification of vacancies.
 - Upon attendance of a course, have your transcripts automatically updated with the corresponding university credit
5. **“Funding your Education”** which includes
 - Facility to apply for educational financial assistance
 - Ability to discharge a loan upon successful completion of a course
6. **“Your Performance”** which includes
 - A full performance management system for both staff and management
 - A reporting relationship that assesses staff performance and relates to the Critical Success Factors of Envision Financial
 - Goal-setting and tracking system
7. **Envision U Faculty**
 - Information on all Envision U faculty and areas of specialization including educational history and credentials
 - Course equivalency information.

Why a Corporate University?

With the ever-increasing demand on efficiency in training and higher corporate expectation of knowledge and skills, the corporate university is fast becoming the vehicle to meet these demands. The customization of cost, content, delivery, and scheduling are the driving forces behind the rapid development of this trend. With the full-time dedicated staff at Envision, materials can be custom-developed enabling the student to learn the content they need, in a manner that meets their learning style, and in the time frame that suits their schedule. From traditional classroom, or computer-based learning, to web-based courses available from remote locations, Envision U provides staff with what they need, when they need it.

This form of delivery ensures that the self-sustaining Employee Development business unit delivers and contributes to the bottom-line efficiency of Envision Financial. Through more efficient operations and outside sales of its technology, Envision U is an integral member of the revenue-producing team at Envision Financial.

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Determining Training and Development Needs

Envision U includes a system for evaluating needs for training and development based on the following criteria.

1. **Individual level:** A “gap-analysis” tool which identifies the courses currently required to fulfill an individual’s position. The information is further detailed through the use of a “Learning Map Evaluation” which assesses the individual’s need, or lack thereof, for the course content based on their existing knowledge/skill in that course. Exemption from a course is possible based on the competence level demonstrated on the evaluation. Staff complete an annual Personal Development Plan as part of the performance review process. This process, in turn, enables the planning of the course calendar for the year.
2. **Branch level:** A “Branch Gap-Analysis” tool, which assesses the knowledge gaps at a branch or department level.
3. **Corporate level:** This will assess knowledge gaps corporate-wide to assist in determining and planning course offerings and meeting key corporate goals.

The faculty of Envision U partner with department heads, management teams and senior executive to determine training needs (both short and long-term) that fulfill the company’s strategic direction. From there the training strategy/initiatives and calendar are developed and planned on an annual basis. Because of the autonomy with content and delivery, all courses can be designed to coincide with the six Critical Success Factors ensuring alignment with the strategic corporate objectives.

Assessment Procedure

Envision U employs a number of assessment tools and procedures. From financial to the individual learning effectiveness stats, there are integrated tools to evaluate the overall effectiveness of the university.

Learning: Learning is assessed on two different levels. A pre-course evaluation is automatically generated upon registration in a course. The current skill/knowledge level is assessed online based on the learning objectives of the course.(At this time, a determination is made for attendance or exemption). After attendance, a 90-day post-course assessment is completed. This enables the tracking of training efficiency and increase in knowledge. These stats are then compared to the increase in sales or service performance to determine effectiveness of training and return on investment.

Financial: Reports are generated to compare the overall cost of in-house delivery compared to employing external training sources. This includes development of training guides, manuals, classroom supplies, and facilitation.

Instructor: At the conclusion of each course session, the instructor completes the online attendance, which generates a course/instructor evaluation in the form of an email. This assessment tool details the value of the content as well as the performance of the instructor. This information is then utilized in the performance management section for the annual review process.



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Envision U – The Leader in Corporate Universities

Perhaps the crown jewel of achievements is the development of the Fast-Track Degree program. Due to the associated accreditation program, where staff receive university credits for courses taken through Envision U, Envision Financial currently has 25 students progressing through the BBA program. These students have been grand-fathered through the first two years of the program and started at the 3rd year level. This program enables students to achieve their Bachelor's degree through part-time studies at a fraction of the time required in traditional delivery programs.

As reward for its passionate pursuit of excellence, Envision U has enjoyed international recognition as a leader in the industry. It has been our pleasure to receive awards from various agencies that recognize achievement of excellence in education. Some of the rewards that Envision U has achieved or been instrumental in achieving are

- **Recognized as one of the 50 Best Employers in Canada by the Report on Business for 2003 and 2004.**
- **Recognized as one of the Top 100 Companies to Work for in MacLean's Magazine**
- **Internationally recognized as the Most Innovative Corporate University through the Corporate University Best in Class program sponsored by HR Events.**
- **Named as a finalist in the HR Technology Excellence Awards, for most innovative use of Human Resource Technology.**
- Received the **2003 HRMA Award of Excellence**, for developing and implementing people practices that reflect leadership and innovation.

If you are interested in knowing more about our exciting technology or in seeing the future for yourself, contact us through one of the methods below.

[Envision Financial](#)

[Envision University](#)

[Carol Hama](#): Manager, Organizational Development

[Jeanette Genge](#): Manager, Employee Development: