

Training Needs Assessment for Palli Karma Sahayak Foundation and its Partner Organisations' Staff

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a) Researchs' Identity

1. Kazi Bazlul Karim, Director
M.A. (Sociology), Dhaka University
M.S. (Rural Sociology), University of Philippines, Los Banos
2. Dr. Mokshedul Hamid, Deputy Director
Ph.D (Pedagogy), Institute of General Pedagogies of the Academy of Sciences, Moscow, USSR
3. Provash Chandra Pramanik, Joint Director
M.Com. (Accounting), Rajshahi University
4. S.J. Anwar Zahid

b) Objectives

The broad objective of the study was to assess the training needs of both PKSF and PO's staff with particular emphasis on its credit, savings and financial management programmes. The specific objectives of the study were to:

- i. identify the present status of training of various categories of staff of PKSF and POs;
- ii. identify the existing competencies/skills of PKSF and PO's staff in areas that are most critical to their routine operations;
- iii. assess the training needs of each category of staff as perceived by them and their supervising/controlling officers, and
- iv. come up with a set of recommendations indicating the future training areas for the officials and staff of PKSF and its POs on the basis of the findings.

c) Executive summary

Respondents : PKSF Officials and Staff

At the PKSF, officials and staff were interviewed. Category wise respondents were DGM (1), AGM (2) (categorized as Senior Officials), Manager(10), DM(19), AM(12) (categorized as Junior Officials), Personal Assistants(2), Accounts/Administrative Assistants.(2), Computer Operator(3), Assistants grade I-II, Telephone Operator(1) (categorized as staff).

Characteristic of the Respondents

Level of education of PKSF officials was found to be quite high having Masters Degrees. Other staffs were also qualified ranging from Higher Secondary level to Masters Degree. Considering the level of education of its personnel, PKSF is quite rich in terms of human resources.

Officials and staff mostly belong to the younger generation, 75% of staff being below 30 years of age. Most of the officials and staff have just started their professional career at PKSF, mostly having no previous working experience.

Present Status of Training

After joining the PKSF, the officials were trained within the PKSF and by some specialized Institutions, such as BARD, Comilla, BPATC, Grameen Bank and Sonali Bank. These courses were mostly designed to orientate them about the poverty alleviation programmes for the country and equip them with a minimum required skill to work in an apex financial institution dealing with micro credit for the rural poor. Some courses where most of the officials participated were Field Level Training at Grameen Bank, Rural Development and Poverty Alleviation course at BARD, Comilla and In-house Training at PKSF. Most of these courses were one week duration. Staff of the PKSF had not received any training after joining PKSF.

Junior officials rated In-house Training at PKSF having highest relevancy to their work compared to other courses, which was rated 0.86. The same course was also highly rated by them (0.72) while indicating the increase in the level of skill due to training. Besides, Field Level Training at Grameen Bank and Field Training at POs were also considered highly relevant to their work and had increased their level of skill moderately. On the other hand Rural Development and Poverty Alleviation course at BARD was considered by the respondents as having lowest relevancy to their work being rated 0.41 and increase in the level of skill was also rated in the lower side (0.31).

Existing Level of Skill

Junior officials (Manager, DM and AM) were asked to give their job description to judge their level of awareness about their routines, duties and responsibilities. It was found that most of the officials were more or less aware of their routine risks.

Respondents were provided with a list of 18 tasks in which they were directly or indirectly involved and then they were asked to rate their relevancy of individual work and present level of skill against each task. To the Managers and AMs Environmental Impact Assessment and to DMs Gender Planning in Micro-Enterprise Development were found to have lower relevancy for work. Performance Evaluation of POs, Appraisal of New POs and Auditing Systems were identified as having highest work relevancy by the managers, DMs and AMs respectively.

While rating their present level of skills against different tasks both DMs and AMs rated 77% of the tasks below 0.50 and in case of Managers it was 66%, which means they possessed below average level of skills in most of the tasks. However, in general they only possessed average level of skill in their routine tasks.

Senior officials of PKSF considered all the 18 tasks listed had very high relevancy at work in their organization, where they had rated 13 tasks to the level of 1.00.

From the assessment of the senior officials about the present level of skills of the juniors against each task it was found that the level of skills of the Managers was higher compared to DMs and AMs. While the level of DMs was higher than AMs. They rated Managers within the range of 0.51 to 0.78 with an Overall Skill Index (OSI) of 65.99% which can be considered as having a level of above average and in case of DMs the range of rating was 0.44 to 0.63 with an Overall Skill Index (OSI) of 52% which means a level of average AMs were rated within 0.29 to 0.63 with an OSI of 44.17% indicating below average or poor level of skill. However, for all the three groups, they rated certain tasks such as Environmental Impact Assessment, Strategic Planning and Community Skills Development in the lower side.

Both senior and junior officials were provided with a list of qualitative aspects containing 27 and 9 items respectively. Both the groups considered those qualitative aspects had very high relevancy to their work with an Overall Relevancy Index (ORI) above 91%. OSI of those aspects calculated were 74.70% for the seniors and 71.72% for Managers, which can be termed considerably above average. In case of DMs and AMs OSI of the same calculated were 64.42% and 68.50% respectively that is above average.

Future Areas of Training Identified by the PKSF Officials and Staff

Among the major areas of future training on Micro Credit Management was the most common preference for all the three groups of junior officers, Budgeting and Auditing of POs and Financial Management were also preferred by DMs and AMs while the Managers preferred Micro-Enterprise Development and Risk Management, Computer Literacy Course received highest priority among the junior officers.

For abroad training, most of the Managers (60%) preferred Financial Management, while their senior colleagues suggested the same course for all the juniors within the country.

Senior officials stressed mostly on Strategic Planning and Financial Management for both in-country and foreign training. Besides, Monitoring and Evaluation was suggested for in-country training only.

At the staff level the top priority indicated was Computer Programme (90%), Secretarial Services and Accounts keeping and Management (40% each). For these groups of respondents, PKSF officials also preferred the same areas.

Respondents: Chief Executives, Officials and Staff of POs of PKSF

From the 12 POs the number of respondents was as follows: Chief Executive(12), Mid Level Officers (MLO) (28), Accountants(21) and Field Workers(72)

Chief Executives

Background Information

Chief Executives were highly qualified mostly having Masters degrees and most of them having experiences of working with their respective organizations for more than 10 years.

Present Status of Training

Chief Executives received training in different areas but there were only 6 areas where 3 or more of them received training among those areas. Institutional Management and Development training was received by 41.67%, followed by Credit Management (33%), Project Management, Management Development, TOT and Gender Development (25% each). None of them received training on Financial Management.

Future Areas of Training Identified by the Chief Executives

They suggested 16 different areas for their future development. However, Financial Management received the highest priority being mentioned by 83.33% followed by Credit Management (50%) and Project Management (41.67%). They preferred mostly specialized institutions for their training.

PKSF officials suggested 12 different areas for the training of Chief Executives. Majority of them (55%) suggested Financial Management. Monitoring and Evaluation, Credit Management and Strategic Planning were suggested by 41%, 34% and 25% of PKSF officials respectively. Regarding location of training PKSF and Specialized Institutions were recommended by most of the respondents.

Officials and Staff of Partner organization

Characteristics of the Respondents

Officials and staff of POs including Mid Level Officers (MLO). Accountants and Field Workers (FW) had educational level ranging from less than Secondary to Masters degree. In case of MLO and Accountants majority had Graduation degree, while FW were mostly having Secondary and Higher Secondary level of education. Mean length of work in the present position of the MLOs. Accountants and FWs were 2.18, 4.55 and 2.56 years respectively. Most of the respondents (76%) had no previous working experience.

Present Status of Training

At the PO level officials and staff had wide range of training received from different Net-Working NGOs. It was found that about 92% of them had received training. Major areas, where MLOs received training were TOT (53%) and Credit Operation Management (46%). majority (57%) of the Accountants was trained in Accounts Keeping and Management. Among the FWs about 35% received training in Group Formation and Management, 27% on Human Resource Development and 25% each on Gender Development and Credit Management.

Existing Level of Skill

Among different groups there were variations in the knowledge about their respective job descriptions. It was found that 71% of the FWs could mention 50% or more of their tasks; the same percentage of their tasks could be mentioned by the 50% of the MLOs and 43% of the Accountants.

From the self-assessment of the respondents against their job, it was found that the Accountants had an OSI of 51.40%, which means they possessed average level of skills. In case of MLOs and FWs they had an OSI of 62.38% respectively which indicates above average level of skills.

In terms of skill in different tasks it was observed that the MLOs had comparatively higher level of skills in Institutional and Administrative activities (0.66), General Activities (0.65) and Office and Personnel Management (0.64). In credit and Financial Management they rated lower (0.56).

Among 7 broad tasks of the Accountants, they had comparatively higher skills in Savings Activities (0.61). Financial Management (0.60) and Bank Related General Activities (0.57). They rated Budget and Budgetary Control, Financial Statement Related Activities and Audit Activities within the range of 0.41 to 0.48, which means they possessed below average level of skills.

Field Workers rated Savings Activities (0.67) and Loan Activities (0.66) as having comparatively higher level of skills. They rated their skills in General Activities (which included some important tasks such as group formation techniques, group dynamics technique,, techniques for identification and selection of IGAs) at 0.55, which means having average level of skills.

Future Areas of Training Identified by the Respondents

MLOs gave priorities mostly for 4 areas, namely, Credit Operation and Management, Financial Management, Monitoring, Supervision and Office Management besides 12 other areas. Chief Executives of PWs also preferred the same areas for their MLOs. While PKSF officials stressed more on Supervision and Monitoring and Financial Management for the MLOs.

Accountants identified 10 areas for their future training with Financial Management having highest priority followed by Accounts keeping, Budgeting and Budgetary Control. In this case Chief Executives identified the same areas with similar priorities as mentioned by their Accountants. PKSF officials also mentioned the same areas in addition to MIS for the Accountants but with a priority on Financial Management, Budgeting and Budgetary Control.

While identifying their future training areas, FWs mostly preferred Savings and Credit Management, Accounts keeping, Survey and Data

Collection, Identification and Appraisal of IGAs. As per recommendations of the MLOs, Group Formation and Management received the highest priority for their Field Workers; their Chief Executives suggested mostly Accounts-keeping with Group Formation and Management having the second priority. PKSF officials stressed more on Group Formation and Management besides Maintenance of MIS Sheets and Accounts-keeping.

As regards location of training MLOs and Accountants mostly preferred Specialized Institutions followed by PKSF for their self-training. Chief Executives of POs had the same preference for their MLOs and Accountants. PKSF officials suggested mostly PKSF along jointly with other POs for the training of MLOs and Specialized Institutions along with other POs for the Accountants.

For the Field Workers of POs their Chief Executives preferred locations were Specialized Institutions followed by Field level training. In this case PKSF officials suggested jointly with Other POs, own POs and PKSF as suitable locations for the training of FWs.

