

Pacific Gas & Electric (PG&E)

Needs Assessment Approach

Overview

This document discusses two topics related to a needs assessment for PG&E:

- Needs Assessment Approach
- Needs Assessment Strategy

In the Needs Assessment Approach, I will share what I learned about the company's climate and culture, products and services, project stakeholders, and visions and values.

In the Needs Assessment Strategy, I will explain how I would approach stakeholder buy-in, why certain questions are important, the necessity for access to certain documents and techniques for completing the needs assessment.

My thoughts on the importance of the analysis phase in designing a training program is included in the body of my blog.

Company Introduction**Company Climate and Culture:**

The customer facing company website introduces PG&E with the following information:

"Pacific Gas and Electric Company, incorporated in California in 1905, is one of the largest combination natural gas and electric utilities in the United States. Based in San Francisco, the company is a subsidiary of PG&E Corporation."

"There are approximately 20,000 employees who carry out Pacific Gas and Electric Company's primary business—the transmission and delivery of energy. The company provides natural gas and electric service to approximately 15 million people throughout a 70,000-square-mile service area in northern and central California."

"Pacific Gas and Electric Company and other utilities in the state are regulated by the California Public Utilities Commission. The CPUC was created by the state Legislature in 1911." (Pacific Gas & Electric)

Continued on next page

Needs Assessment Approach, Continued

Company Introduction (continued)

Being anything but a novice in the utility industry, I know that PG&E is the largest utility company in California, serving most of northern and central California, as well as some parts of southern California. They have an in-house training department called PG&E Academy which often contracts work out to learning solution specialists.

Being both a natural gas and electric utility, the company needs to have a huge work force of experts in all aspects of providing utilities to residents, commercial and wholesale customers. Employees include planning and service engineers, construction and maintenance teams, administrative staff and security employees at the Diablo Canyon Nuclear Power Plant. All the work done by these employees is regulated and monitored by federal, state and local laws and standards applicable to utility companies.

The work the employees do is often dangerous and can result in injury or death. Furthermore, if the work is done incorrectly, it can mean injury or death for the customer. This fact alone, along with their constant message, "Safety First" logically points to employee training and development as strong preventative measures. Federal and State laws mandate that employees receive the proper amount of training for their job, along with maintenance training, to qualify a worker as eligible to perform certain dangerous kinds of work. Training is a way of life at PG&E.

Within the last year PG&E had a devastating gas explosion in San Bruno. This prompted internal as well as external investigations, fines, law suits, and a swing back toward training as a way to ensure employees are prepared and qualified for the dangerous work they do.

Consumer Products and Services

PG&E provides natural gas and electric utilities to residential and business customers.

PG&E is known for its green initiatives. They utilize solar, wind, and hydroelectric power as forms of renewable energy for their customers.

Solar power customers can actually sell power back to the "grid" if they are using less energy than they are "producing". This is done using a Smart Meter which, for the first time, has a bi-directional dial.

Continued on next page

Needs Assessment Approach, Continued

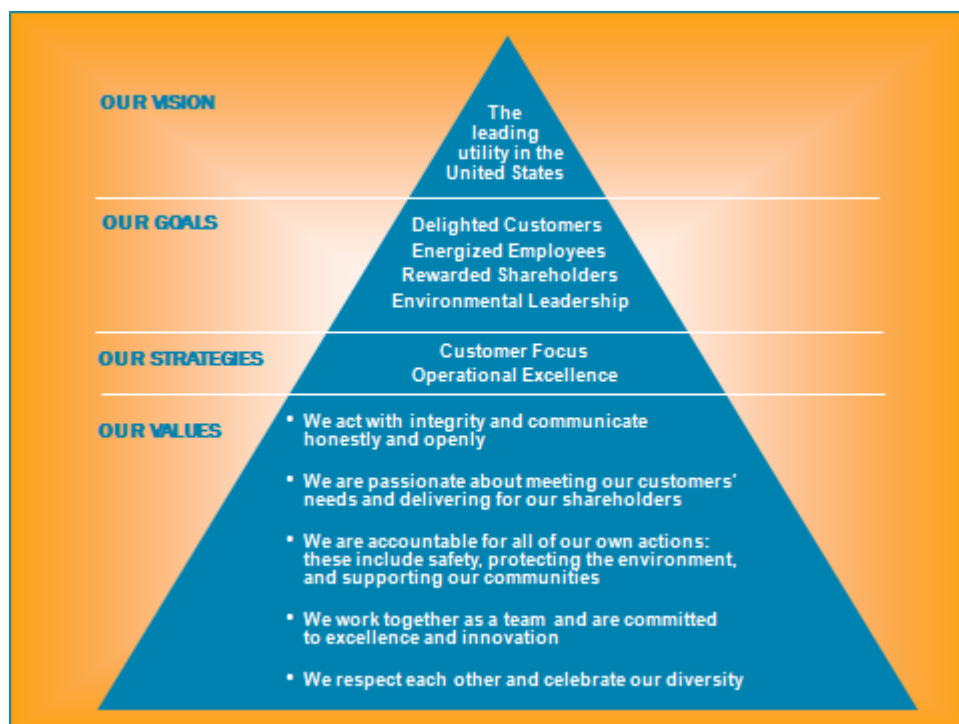
Organization

Important PG&E Stakeholders are going to depend on which line of business (LOB) your work is in. A Gas LOB project will have different stakeholders than a project in the Electric LOB. Most project work, unless contacted directly from the LOB, will be managed through the Learning Academy. The Learning Academy has its own processes, templates, checks and balances for developing and delivering internal training. This pairing between the Academy and developer ensures that all training is rigorous, thorough, and looks and feels the same to employees across the company.

Visions & Values

The culture of PG&E is built around their visions and values. Everywhere you go on client site, you will see these pyramids. These visions and values are mentioned in every meeting, and included in the beginning of all Academy delivered training.

Strategic planning, or weaving business strategy into training design and development, is a strong way to “reinforce the value of learning and its importance for the business.” (Noe, p. 54)



Needs Assessment Strategy

Scenario

For this case, I will use the following example:

Problem statement:

The responsibilities of Senior New Business Representatives (SNBR) and Industrial Planning Engineers (IPE) have grown over time requiring them to know more, but the formal training content has not kept up.

The roles can now be promoted from within the company, and new Service Reps are often asked to learn as they go. Knowledge gaps result in a high number of contract mistakes.

Customer satisfaction has been decreasing due to inaccuracies in the contracts that cause problems and delays for the customers.

Those Service Reps with senior experience are becoming a minority. Now is a great time to tap into their knowledge from years of experience and develop an up-to-date, all-inclusive, robust curriculum to raise proficiency.

Stakeholder Buy-In

- *What stakeholders would you want to make sure to get buy-in from?*

For this scenario, Estimating and Service Planning is the line of business (LOB) requesting this work. This was not requested from the upper Director level, but they will be updated on the progress of this project. Stakeholders required for buy-in, and approval of this project would include:

Thom De Young, *Senior Project Manager*

Mark Robb, *Estimating & Service Planning Performance Supervisor*

James Palsgaard, *Estimating/Service Planning and Clerical Support Manger*

Questions

- *What questions would you ask (and to whom would you address them) during the organizational, person, and task analysis phases?*

This project doesn't reach the VIP, except to inform, but the Upper-Level Manager type questions should still have answers, justifying the strategic alignment of training with PG&E business strategy.

Continued on next page

Needs Assessment Strategy, Continued

Questions
(continued)

Below are some sample questions I would ask my stakeholders during Organizational, Person, and Task Analysis.

(Adapted from Table 3.1 Key Concerns of Upper-Level and Mid-Level and Trainers in Needs Assessment) (Noe, p. 105)

<p>Organizational Analysis</p>	<p>James Palsgaard Questions:</p> <ul style="list-style-type: none"> • What business objectives are you trying to meet through this project? • Does this training fit into any strategic training plans currently in progress? • How does this support PG&E business strategies? • Are there any threats to the audience? <p>Mark Robb Questions:</p> <ul style="list-style-type: none"> • How much money has been budgeted for this project? • What line of business goals do you want this project to meet? • Who will be my resources for this project? <p>Thom DeYoung Questions:</p> <ul style="list-style-type: none"> • What is our timeline for this project? • How many hours may I spend with my subject matter experts?
<p>Person Analysis</p>	<p>James Palsgaard Questions:</p> <ul style="list-style-type: none"> • Which business groups require training? • Have they taken similar training in the past? <p>Mark Robb Questions:</p> <ul style="list-style-type: none"> • Which roles need to be trained? • How have they received training in the past? <p>Thom DeYoung Questions:</p> <ul style="list-style-type: none"> • Who specifically requires training? • Do you have records of their past trainings?

Continued on next page

Needs Assessment Strategy, Continued

Task Analysis	<p>James Palsgaard Questions:</p> <ul style="list-style-type: none"> • What standards and regulations need to be followed when designing this training? • Who will be my contact at the Learning Center? <p>Mark Robb Questions:</p> <ul style="list-style-type: none"> • What are some common performance issues you would like me to look for? • What documents or standards do I need and how do I get access to it? • What is the scope of this project? <p>Thom DeYoung Questions:</p> <ul style="list-style-type: none"> • What are the specific tasks and topics I need to cover in this project? • What are the skills and qualifications necessary (prerequisites) for attempting these tasks?
----------------------	---

Requested Documents

- *What documents or records might you ask to see?*

First, I would want access to (could be a resource with access) to:

- Related internal document sharing sites (includes technical documents, manuals, records, etc).
- Related LMS training programs for comparison
- Audience/Learner training records for audience analysis

In this case, employee qualifications for work mean there is a training trail for each learner. Understanding how the content was delivered (for comparison) can help for understanding the learner and company culture for learning. "Online technology is available to monitor and track employee performance. The information is useful for identifying training needs and providing employees with feedback regarding their skill strengths and weaknesses." (Noe, p. 108)

Needs Assessment Techniques

- *What techniques would you employ (see Table 3.2 on page 108 of the Noe text), and why?*

The two most common techniques I employ when conducting analysis on a client or project is through Interviews or Documentation.

Continued on next page

Needs Assessment Strategy, Continued

Needs Assessment Techniques
(continued)

The primary reason I use interviews and documentation to learn about my client /project is because my clients are not geographically near me. I live in Washington, but my client is in California. Keeping the budget in mind, there are many things that I can do remotely such as access internal document sites (SharePoint and Technical Library) or do a phone interview.

Certain information can be more accessible in my analysis depending on my analysis technique. In the same respect, my chosen analysis techniques can hinder my analysis.

There are some disadvantages identified by Noe in the adapted table below, which can be planned and prevented, or at least adapted. For example, under documentation disadvantages, obsolete materials are a concern. An adaption to that disadvantage could be if I review the documentation before the interview, I could bring my questions about material content to the SME.

(Adapted from Table 3.2 Advantages and Disadvantages of Needs Assessment Techniques) (Noe, p. 108)

Technique	Advantages	Disadvantages
Interviews	<ul style="list-style-type: none"> • Good at uncovering details of training needs as well as causes of and solutions to problems. • Can explore unanticipated issues that come up. • Questions can be modified. • Can be done over the phone, or in a web meeting on the internet. • Can be recorded to analyze at a later time. 	<ul style="list-style-type: none"> • Time consuming. • Difficult to analyze. • Needs skilled interviewer. • Can be threatening to SME. • Difficult to schedule. • SMEs only provide information they think you want to hear.
Documentation (Technical manuals, records)	<ul style="list-style-type: none"> • Good source of information on procedure. • Objective. • Good source of information for new jobs and jobs in the process of being created. 	<ul style="list-style-type: none"> • You may be unable to understand technical language. • Materials may be obsolete.

References:

Noe, R. A. (2010). *Employee Training and Development* (5th ed.). New York, NY: McGraw-Hill.

Pacific Gas & Electric. (n.d.). *Pacific Gas & Electric*. Retrieved October 30, 2011, from About/Company/Profile: <http://www.pge.com/about/company/profile/>

©Not for use outside of academic learning, explicitly at Walden University.

®Information in this document is not meant to be copied, replicated, or used in any manner outside of the purpose of this document.