



## **Case Study:** Needs Assessment and Development of a Strategic Learning & Development Plan

**Organization:** Inter-American Development Bank

**Situation:** A needs assessment was conducted to develop a comprehensive multiyear Learning and Development strategy to support the implementation of the new Sustainable Infrastructure for Competitiveness and Inclusive Growth strategy. The needs assessment included three divisions of the Inter-American Development Bank's (IDB) Infrastructure and Environment Sector (INE). The assessment examined the knowledge, learning, and development requirements that would support the technical staff, administration, and consultants to contribute toward the organization's strategic objectives.

**Technical Approach:** The needs assessment focused on performance accomplishments of employees and mid-term consultants, and the skills and knowledge required to support those accomplishments in relation to INE's strategic objectives. This is in contrast to traditional needs assessments that limit their focus on an inventory of "wants" for training, not clearly linked to on-the-job performance accomplishments or the organization's strategic priorities.

The planning and implementation of this strategically aligned assessment was significantly enhanced by the close collaboration between the IFNAE team and the client team, which is characteristic of IFNAE's participatory approach to supporting organizational change. Data collection activities were comprehensive and included examination and integration of a wide range of organizational documents, including the new strategic plan, competency models for numerous positions, performance management plans and tools, as well as directing online surveys personalized for multiple job categories, semi structured interviews and focus groups with employees, consultants, management, and internal and external clients.

The organizational needs became the basis for actionable recommendations for INE and the three divisions as well as the Knowledge and Learning Sector (KNL), which included knowledge content and instructional methodologies by target group and job role, as well as key

performance indicators for ensuring transfer of training, tracking effective implementation, and evaluating outcomes on an annual basis.

**Project Outcomes:** A clear five-year roadmap was developed for knowledge and learning solutions that were measurably linked to the organization's strategic objectives and had clear measures of success to help track effectiveness along the way and make necessary improvements. Technical knowledge and expertise was transferred from the consultant team to the client team, due to the highly participatory and collaborative nature of the approach. The L&D function demonstrated its value and earned credibility and influence as an important strategic partner for the organization.