

Applying the FEA and the OEM to Strategic Needs Assessment of Faith-Based Daycare

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Tales from the Field, a new monthly column, consists of reports of evidence-based performance improvement practice and advice, presented by graduate students, alumni, and faculty of Boise State University's Instructional and Performance Technology department.

The Field —Abundant with Opportunities to Apply IPT Tools in Business Settings!

There is great opportunity for students to gain professional experience in the business setting. Organizations have a need for analysis of performance issues and often have lessening resources available to address these issues, while academia can offer both the resources and capability needed to conduct such analysis. Academia can offer resources through the availability of time, personnel (i.e., students), and technical expertise in the use of evidence-based tools and models. There is a natural marriage opportunity between business and academia and this narrative outlines a story of one such occurrence.

In Dr. Don Winiecki's Needs Assessment class at Boise State University, one group of students conducted a strategic needs assessment project for a local church that offers faith-based daycare services in the community.

The performance issue(s)

This project was initiated because the daycare did not consistently earn a monthly profit for the 2007 calendar year, and projections suggested that the daycare might continue to lose money over the next few months if the status quo continued. There had been debate among church leadership over whether the financial loss should be treated as a problem. Similarly, there had been disagreement around how to address the potential problem, as there were conflicting perspectives on the purpose and goals of the daycare. The daycare did not have a formal business plan and lacked an established vision, mission, and strategy. Because a general lack of agreed-upon direction is what the daycare's key leaders had cited as a roadblock to determining what, if anything, must be done to improve the organization's financial situation, it was believed that a strategic needs assessment would yield usable findings for the daycare leadership to develop a vision, mission, and strategy.

Framing the system

Two models were employed to guide the project's data collection and analysis: an adapted form of Joe Harless' (1973) Front End Analysis (FEA) and Roger Kaufman's (1981) Organizational Elements Model (OEM). The FEA provided key questions that were asked of daycare leadership to understand the problem outlined above, prepare the project plan, and identify the client's preference to address the need for an established vision (rather than conduct a financial assessment).

Analysis: Documenting the dynamics

The OEM was used to design the data collection framework for the strategic needs assessment, some of which is shown below.

Table 1. Data Collection Framework

Types of Data	Collection Methods	Data Sources	Corresponding OEM Element
<i>Data Collection Methods</i>			
Potential daycare goals (includes goals related to services)	Open-ended interviews	Daycare director, church pastor, church elders, daycare school board	Products, outputs, outcomes
Potential performance measures	Open-ended interviews	Daycare director, church pastor, church elders, daycare school board	Products, outputs, outcomes

Types of Data	Collection Methods	Data Sources	Corresponding OEM Element
Perceived performance gaps	Open-ended interviews	Daycare director, church pastor, church elders, daycare school board	Products, outputs, outcomes
Potential tactics for closing potential performance gaps	Open-ended interviews	Daycare director, church pastor, church elders, daycare school board	Processes
Existing daycare activities	Open-ended interviews	Daycare director, daycare employees	Inputs, processes, products
Typical goals, objectives, and strategies of other daycares	Semi-structured interview	Owner of another Private Industry Daycare Entity	Products, outputs, outcomes
<i>Additional Data Collection Methods</i>			
Potential daycare goals (includes goals related to services)	Written survey (informed by previous interviews)	Daycare director, church pastor, church elders, daycare school board	Products, outputs, outcomes
Existing daycare performance	Extant data review	Financial reports	Inputs, processes, products

The collected data were analyzed by incorporating them into three tools to ground further analysis and NA advice in systems thinking and doing: (1) The OEM was used to identify potential strategic directions for the daycare and their corresponding supporting elements; (2) Behavior Over Time Graphs were used to identify context for various performance levels over time; and (3) Causal Loop diagrams were employed to show relationships between various factors.

Project recommendations

The data analysis produced a “menu” of potential strategic directions the daycare could consider, along with a map of supporting interventions that would likely be needed to support each strategic direction. In addition to this, a few overarching recommendations resulted as well. They are:

- Develop a business plan based on a common vision, mission, and set of strategic objectives.
- Hold off on determining whether to subsidize daycare services for low-income families until decisions are made regarding the financial sustainability issue.
- Survey parents to identify which daycare services are most important to them, and leverage/focus on those services.
- Integrate daycare parents into the daycare board.

HPT-grounded advice

- Collect detailed data early in the project when using Behavior Over Time Graphs and Causal Loop Diagrams in order to obtain a clear and complete understanding of the issue.
- Start with exploratory approaches to data collection (e.g. unstructured interviews) to gain a broad understanding of the situation and later incorporate more structured methods (e.g. surveys) to determine the extent of consensus around the issues.
- Use the OEM to ensure strategic alignment when working through an ill-structured problem and to generate practical roadmaps toward a menu of strategic directions for the client.
- Examine the external environment when analyzing a problem, as this can lead to a broader perspective of issues and ideas for possible solutions.

References

Harless, J. (1973). An analysis of front-end analysis. *Improving Human Performance: A Research Quarterly*, 4, 229-244.

Kaufman, R. (1981). Determining and diagnosing organizational needs. *Group & Organization Studies (also, Group & Organization Management)*, 6(3), 212-222.

Author bios

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