

Work Description Form

Project Name: **Certification Process Competency Program**

Standard 1: Focus on Results or Outcomes

Describe what you did to ensure your clients and stakeholders were focused on the desired results or outcomes.

The purpose of the project was to develop an employee competency program and tracking system in order to maintain company accreditation with ANSI and other outside tracking bodies.

A statement of work in using Excel was used to track the deliverables, maintain the timeline, and keep the team focused on each step of the project. Each time a new objective for the project was proposed, I made sure the team could explain how it fit into the desired outcomes. If it didn't match, I encouraged them to save the objective for another project, if applicable. The team consisted of the Quality Director, Training Department and business unit subject matter experts. The project plan was located on SharePoint, the company's document online sharing system. It was used to monitor progress and apprise the stakeholders of the project's progress throughout the process.

The Return on Investment for the proposed interventions as well as upcoming audit dates also helped to focus on the team on keeping the company accreditation. Without accreditation, the Certification Program, which is the main revenue source for the company, could not operate.

Standard 2: Take a Systemic View

Describe what you did to ensure your clients and stakeholders took a systemic view. Include at least 3 of the following: society, marketplace, workforce, workplace, work, and worker.

At the project meetings, we discussed how XXXInternational is an open system, affected by the outside environment as well as different parts of the internal organization. We brainstormed the systems that will/could be affected by the new competency program. This brainstormed list was referred to during many of the planning sessions to keep the systems thinking going during each phase of the process.

Here is a list of some of the areas we discussed:

- Workers
 - All workers need to demonstrate competence in their functional areas. The plan includes documenting worker competency.
 - New employees need to be trained on each competency related to their jobs. This has a direct effect on the productivity of the departments (*work*). A standardized program to train new workers will allow them to gain proficiency more quickly. The program may require new workers to be involved in the onboarding process for a longer period of time..
 - Existing employees need to be competent in their work (*workers*). The streamlined

process will allow employees to switch between departments and maintain their competency using the new program. This will have a positive effect on the (workplace).

- Senior and mid-level managers have a big affect on the success of the program. If they embrace it, it will be encouraged and followed. If they choose to ignore the program or use some of the old training strategies, the benefits of the new program won't be long term. (*workers, workplace*). They are key to completing the tracking throughout the year that is required to maintain our accreditation.
- Marketplace
 - Our company reputation and credibility is determined by our accreditations and commitment to employee competency. This directly affects our revenue retention and growth. Any changes in the *marketplace* standards need to be anticipated and included in the new program.
- Society
 - The mission of XXXInternational is to improve public health. The standards at our facilities directly affect the quality of drinking water and safety of appliances and other items used by the public all over the world. All of these things are affected by the quality of our workers and their competency.

Standard 3: Add Value

Describe what you did to add value.

One of the ways I added value was to keep the costs of the program as low as possible. During the design of the Competency program, I proposed ways to eliminate the need for future updates and identify training gaps in each department, saving time and money for redesign at a later date. I encouraged building the program to expand as new trainings and competencies are added in future years. Although this created more work, the framework is set for future growth.

I also facilitated discussions on each of the possible solutions, comparing costs, long term results and sustainability factors. We focused on the likelihood of the departments adopting the new behaviors in each scenario, as well as the company's ability to sustain each solution.

Standard 4: Work in Partnership with Clients and Stakeholders

Describe what you did to facilitate a collaborative relationship with the clients and stakeholders.

You *may* create a table that lists the clients and stakeholders (by position/title) that you partnered with throughout the project. One option is to include the role of the position/title on the project, how you partnered with them throughout the project, and the impact each partnership had on the program's results or outcomes.

Position	How we partnered	Impact
Business Units	<p>We collaborated with representatives from the business unit to define what it means to be competent in each functional area. The team completed a job task analysis, wrote the instructional objectives and organized the training to meet each objective.</p> <p>The objectives were used to create assessments for each of the competency areas.</p>	<p>The instructional objectives were used to identify gaps in training for each objective in order to maintain competency.</p> <p>A guidebook was created using the information from the business units to explain the competency program to business unit leaders, employees and outside auditing bodies.</p> <p>Business units used the guidebook and tracking component to run monthly reports to maintain company accreditation.</p>
Managers	<p>The design team worked with managers to get buy in and approval of the competency program.</p>	<p>As a result of this partnership, the design team was able to create a tracking and training system that works within department constraints. Managers identified areas of need in order to implement the program.</p> <p>The data gathered during this collaboration helped to make the competency program more productive and efficient by taking into consideration department needs, software shortcomings and staff availability.</p>
Quality Director and Team	<p>The design team gathered data and collaborated with the quality team in order to identify the training and documentation gaps and requirements to maintain accreditation.</p>	<p>This collaboration allowed the team to meet all the requirements needed for the accreditation of the XXXInternational Certification Process required by ANSI and other outside tracking agencies.</p>
IT Team members	<p>The design team worked with IT to build a competency tracking system for the competencies the be tracked using the required tools.</p>	<p>IT and the design team created a tracking system that is easy to use and maintain, follows the company data requirements and contains all necessary documentation required</p>

		by outside tracking agencies.
Senior Management (HR Director)	The design team partnered with the HR Director and V.P. of Operations to get resources and buy in to create the program, including staff changes to maintain the system.	As a result, permission was granted assign the employees needed to run the program on an annual basis. Permissions to use IT resources was attained, and employee requirements needed to maintain the program were implemented.

Standard 5: Determine Need or Opportunity

Describe your work in meeting this Standard by answering the following questions.

1. How did you define and scope the project?

The objectives for the project were defined and prioritized with the quality director and V.P. of operations.

The purpose of the project was to develop an employee certification process competency program and a system to track competencies in order to maintain company accreditation with ANSI and other outside tracking bodies.

- 1.) Create 8 assessments for each business unit to test for competency in the certification process
- 2.) Create a guidebook defining each competency, required trainings and assessments
- 3.) Create an employee competency tracking system in Oracle

2. What performance level(s) did you investigate and why? Each project requires the inclusion of at least 3 of the following levels: society, marketplace, workforce, workplace, work, and worker.

Workforce (Worker)	The workers were the main focus since they need to be competent in the certification process. They must receive the required trainings and take the required assessments. The new system must have a way to grandfather established employees to eliminate training redundancy.
Workplace	The IT infrastructure was investigated to affirm it had sufficient capabilities to perform the tracking functions required by the outside tracking agencies. The business unit structure was investigated in order to create a program that could be easily implemented by the units once the project was complete.
Society (World)	The international standards for certification process as well as outside tracking agency auditors needed to be investigated in order to meet all the required standards.

3. What was your data sampling strategy?

- Systematic samples of each employee job task were taken in order to write the objectives for each of the competencies.
- Random sampling was used when choosing employees to represent the pilot groups so all levels and departments were represented.

4. What data collection and analysis methods did you use?

Both quantitative and qualitative data were collected to define the need. Quantitative data was gathered when doing the job task analysis for each business unit. Qualitative data was obtained through verbal interviews and email questionnaires in order to design the tracking system that would satisfy the requirements and be a feasible solution for the business units.

Data Gathered:
<ul style="list-style-type: none">• Task analysis for each step of the certification process• Current training and tracking processes in each business unit• Cost of the current competency program vs. the new proposal• Literature reviews on competency standards requirements worldwide
Focus of Survey Questions:
<ul style="list-style-type: none">• Who is in charge of the competency tracking and training?• What are the problems with the current tracking system?• What are the time limits for tracking and reporting the competencies during the average work day?• What are the current retraining methods?• Who will be in charge of running reports and tracking failed assessments
Data Analysis:
<ul style="list-style-type: none">• Task analysis' was reviewed and performance objectives written• Dashboard of each standard requirements according to literature review was created to serves as a guide when designing trainings and assessments• Surveys were charted and grouped using an excel worksheet to discover current tracking and training trends, differences among departments and future needs

5. Describe how the methods supported the purpose of the investigation.

- The job task analysis gave us the information in order to write effective learning objectives for each of the competencies required
- The surveys and graphs provided information needed to design a program that filled the current gaps of the training and tracking programs of the business and served as a guide to design a system that could be sustained by the user groups.

6. Describe the goal of the project in measurable terms.

The primary goal of the program was to have zero citations during outside audits of the XXXcertification process.

The secondary goal is to have 100% of the tracking contained in the Oracle data system.

7. What performance deficiencies or unmet opportunities did you discover?

Each of the business units do not have an identified person in charge of training or tracking. Most departments break up the responsibilities, allowing for important tracking and reporting data to be missed. As a result, there is lack of communication within the department about training and competency tracking, as well as redundancy in each business unit.

Standard 6: Determine Cause

Describe your work in meeting this Standard by answering the following questions.

1. How did you determine the underlying causes?

The causes were determined by analyzing outside certification requirements and identifying any gaps in the current system. The worker and manager surveys were analyzed to identify current training and tracking policies.

2. What cause(s) did this analysis uncover for each performance gap?

- The main cause of the performance gap is that the Marketplace (World) instituted new competency standards that must be followed.
- The secondary causes of possible problems are the inability of Workforce (Workers) to meet the requirements due to inconsistent training and tracking practices in each department.

Standard 7: Design Solutions including Implementation and Evaluation

Describe your work in meeting this Standard by answering the following questions.

1. How did you design the solutions as they relate to the outputs of Standards 5 and 6?

In order to support the goal of attaining and tracking employee competency in the certification process required by the outside certification bodies, a blended approach was created and outlined below.

To meet the workers' and workplace needs:	<ul style="list-style-type: none">• Guidebook listing for each business unit that explains the following:<ul style="list-style-type: none">○ Required competencies○ Learning objectives to reach competency○ Trainings to meet each objective○ Assessments required to prove competency○ Job roles that require each competency• 8 online assessments per business unit to prove competency
To meet Workplace Needs:	<ul style="list-style-type: none">• Competency tracking system in oracle that provides the following:<ul style="list-style-type: none">○ Learning paths for job roles according to required competencies that includes required trainings and assessment○ Automatic recording of competencies to employee learner profiles○ Automatic emails to managers regarding employee competency status○ Monthly reports competency status reports by business unit
To meet the managers' needs:	<ul style="list-style-type: none">• Focus on ease of use and automatic tracking• Clear, concise guidebook outlining the process• Appropriate SSD's created (Job Aids) for each part of the process

2. How did you plan to implement the designed solutions?

Implementation of the solution was planned by using project management tools in Excel. Different members of the development team were responsible for different parts. We had weekly status meetings as well as group huddles for brainstorming and evaluation. We also worked with senior management and IT to create a system that would integrate with the company tools and guidelines.

3. How did you plan to evaluate the designed solutions?

Each output went through several evaluations. An evaluation form was created for each of the online assessments to be filled out by pilot groups, stakeholders, and other members of the training department. After the initial reviews and suggestions were implemented, a second round of evaluations was sent out to quality, training, some managers and a focus group of employees.

Evaluations were also completed by the outside auditing agency to confirm the solution will meet the international requirements.

A formalized pilot of the program will be rolled out for each business unit in a staggered progression, allowing changes and updates to be implemented before the next business unit starts the process.

Standard 8: Ensure Solutions’ Conformity and Feasibility

Describe your work in meeting this Standard by answering the following questions.

1. How did you ensure the solutions conformed to the design specifications during development?

The development team met regularly with subject matter experts and other stakeholders to align solutions to the design specifications during development. Each intervention was thoroughly defined as well as the guidelines for developing each component. A manager toolkit with all examples and templates needed to meet each step was created to maintain conformity and standards, allowing managers all over the world to create the needed documents.

The following list defines the interventions, objectives and guidelines (design specification) for the development team that was provided at regular stakeholder meetings.

Intervention	Objectives Targeted (Design Specification)	Intervention Guidelines
Design Documents: Business Unit Guidebook	Provide each business unit with an employee competency	<ul style="list-style-type: none">• Each business unit must have their own guidebook

	<p>program explanation, guide and instructions in the competency program</p>	<ul style="list-style-type: none"> • Guidebook must contain learning objectives, appropriate trainings, and matching assessments for each competency • Guidebook must explain the competency program to auditors, managers and employees • Guidebook must be expandable and easily edited when future trainings and competencies are added
<p>Online Assessments</p>	<p>Provide proof of competency to outside tracking agencies</p>	<ul style="list-style-type: none"> • Assessments must be at a high enough level so they don't have to be revised every year • Solid assessment design principles must be followed • Assessments should be performance based as much as possible • Assessments must run on the current LMS
<p>Learning Management Tracking System</p>	<p>Provide a competency tracking system for managers and outside auditors</p>	<ul style="list-style-type: none"> • Tracking system must use current LMS • System must be easy enough for managers to input trainings and tracking • System must send automated emails and reports to track competencies
<p>Business Unit Competency Toolkit</p>	<p>Provide a system for each business unit to reproduce the competency program</p>	<ul style="list-style-type: none"> • Provide a turnkey solution for other business units to reproduce the

		competency program <ul style="list-style-type: none"> • Include examples and ready to use templates • Provide established feedback channels during the process
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2. How did you ensure the feasibility, workability, adoption, or success of the solutions during development?

- Ongoing meetings with Quality, IT and the business units were held to make sure the competency program met the required standards.
- Outside auditors were asked to review the program to make sure all international standards were met.
- A long-term plan was developed that included ongoing audit results, manager surveys and quarterly check ins so the program will be successful long term. A yearly review is scheduled to complete updates according to original design specifications.

Standard 9: Implement Solutions

Describe your work in meeting this Standard by answering the following questions.

1. What implementation strategies were developed to allow clients to sustain change?

- A guidebook for each department was completed to explain the process for each business unit. SSD's (job aids) were created to explain each step of the competency process.
- Motivational sessions and an animated video, including reasons for the program and why it's important to each employee were delivered to all business units. Yearly updates and revisions are scheduled by Quality to provide support, feedback and auditor results as the program continues.
- Audit results are shared with departments to keep the program as a top priority in all business units.

2. What methods did you use to track or monitor the new behaviors or changes during implementation?

- New behaviors were tracked using reports from the Learning Management System data management system. Employee competencies are tracked in the data system.

3. What methods did you use to sustain new behavior or changes?

- Monthly reports were set up to run in order to continue tracking of the competencies.
- Auditor responses and citations are shared with the departments so changes can be addressed if needed.

Standard 10: Evaluate Results and Impact

Describe your work in meeting this Standard by answering the following questions.

1. How was the impact of the solution measured in terms of a change in results or outcomes on individual, team, or organizational performance as identified in Standard 5?

Workforce (Worker)	Current and new workers need to be competent their area of the certification process. They must take the required trainings and assessments. The system needed to have some way to grandfather established employees to eliminate training redundancy.
How Measured	Each employee is tracked in the Learning Management System for the required competencies for their job role on a monthly basis. The goal is to have 100% competency rate in each business unit.

Workplace	The IT infrastructure needed to have sufficient capabilities to perform the tracking functions required by the outside tracking agencies.
How Measured	The Learning Management System is checked to make sure 100% employees, trainings and assessments are tracked.

Society (World)	The international standards for certification process and the outside auditors needed to be included to define the scope of the project.
How Measured	The auditor reports are analyzed to make sure there are zero citations in the certification process competency program.

How was ongoing evaluation integrated into a performance sustainment and/or continuous improvement strategy?

A plan to revisit and evaluate the program on a quarterly basis was created. Some of the ongoing evaluation strategies are listed below:

Surveys are sent out to employees and managers yearly to monitor the competency program and how it is meeting future needs of the company.

Literature review is scheduled quarterly to document changes in the competencies in order to keep the XXXcertification program up to date.

Audit findings are analyzed to make sure standards are met.