



Strategic Training Plan 2009-2012

EXECUTIVE OVERVIEW

Training on policies, processes, and systems is an essential part of the success of the OCFO organization for both departmental and lab-wide employees. While many training courses have been developed in the past, more are needed and there is a need to transition some of the OCFO training programs to other delivery methods that will not only increase the reach and efficiency of the training provided but also allows Lab employees to obtain the training at the point of their need. These needs require the development of a systematic approach to training not currently existing within the OCFO. This is important as there are restrictions in the resources available to conduct training and training is most effective for adults when delivered in a timely manner. In addition, Lab employees should be able to understand what training is required of them and then be able to find information and training they need quickly, without the need to go to several different websites. This document will outline the strategies, methods and goals needed to provide highly effective training which supports the OCFO's business strategy to OCFO and Lab employees.

VISION

OCFO Training will develop and coordinate educational programs using industry-leading methodology and technology to effectively support the OCFO business strategy by improving financial systems policy, procedures, and systems knowledge for its employees and Laboratory partners.

MISSION

The mission of OCFO Training is to provide training courses and consultative services to enhance Laboratory training in policies, procedures, and systems related to the services provided by all OCFO departments. Training courses are developed and deployed using industry-standard methods to include rapid development practices, electronic delivery, and tracking systems. OCFO Training will aspire to be a leader in effective employee training throughout the Lab and will share its best practices in a collaborative effort with other Lab training entities in order to increase the effectiveness of all Lab training efforts.



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SWOT ANALYSIS

In order to understand the current state of the OCFO training programs, interviews have been conducted with key functional OCFO managers, ad hoc trainers, and others in the Lab who understand training and the Lab culture that currently exists in regards to training. This analysis of the OCFO Training programs strengths, weaknesses, opportunities and threats is presented here to provide the context for the strategies, goals and objectives presented later in this report.

Strengths

- Well-educated and experienced Lab employees.
- Training is supported by line managers and the Lab's culture.
- Employees exhibit a willingness to "lend a hand" in improvement efforts.
- Many training industry standard software and collaboration tools are already purchased and are in use in some manner.
- Providing feedback through surveys is commonly used and response rates are sufficient to be helpful.

Weaknesses

- There is no overall training strategy or consistency of training practices among the various OCFO departments. This presents a different and inconsistent face of the OCFO to its customers.
- Most OCFO employees do not have a job-based curriculum plan which causes confusion as to what is expected of them.
- Key courses relating to financial systems and practices have not yet been developed. Existing courses have been primarily targeted to OCFO employees only but training for other non-financial professionals is needed.
- Training courses are difficult to find as they are on different websites, wikis and systems. A full catalog of OCFO training course is not available in one place.
- Multiple training registration and deployment platforms exist. There is one system for classroom registration and several others for launching eLearning materials.



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- No comprehensive training tracking and reporting system exists. Classroom training and some eLearning materials can be tracked through the JHA site but it does not contain all training course information.
- Only one dedicated OCFO training resource is on staff.
- Ad hoc functional trainers do not receive any Train-the-Trainer guidance to help their success.
- Training needs and plans are not typically considered and developed in the RFP or project planning phases of Lab projects. This causes the training to always be “catching up” to the project and inefficiency in costs and effort needed to provide training.
- Physical classroom training is the primary method used for all training. While appropriate for some types of training, it has limitations in scalability, reach, and timeliness.
- No regular plan for course maintenance is implemented causing many irrelevant or outdated courses to mistakenly continue to be available for employees.
- Continuing education programs for OCFO and Lab employees are inconsistent.

Opportunities

- OCFO senior management desires the development of a comprehensive training strategy which reaches across all departments and is aligned with the OCFO business strategy.
- Self-paced eLearning opportunities are desired by Lab employees and can be primarily developed using the tools the Lab currently has.
- Curriculum plans and mapping can be done for OCFO employees in order to define specific courses and activities needed to improve individual and departmental success.
- The Lab is part of the UCOP learning management system consortium and can use the university-wide implementation of a comprehensive LMS system to provide solutions to the challenges of not having all courses easily seen by users, multiple training deployment platforms, tracking events, and reporting on overall training readiness and effectiveness.
- Virtual classroom technology is available to the lab and the recently hired OCFO Training and Development Specialist is an expert in the effective use of this technology to provide scalable training and archival of courses for “just-in-time” use by Lab employees providing additional reach for these courses



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- The OCFO desires the creation of a standard training course development process to include scoping, objective development, prioritization, and deployment selection will provide consistency in training material development and project planning.
- Continuing education of OCFO and general Lab employees is desired and may be delivered through additional methods such as eLearning, virtual classrooms and enhanced communication plans through existing Lab communication venues.
- Various training departments exist throughout the Lab in a decentralized structure and would be well-served to collaborate on best practices, sharing of tools, and delivery platforms all helping to provide more efficiency in creating and providing training.
- Functional managers are willing to look at existing course and evaluate them with the goal of improving quality of delivery and effectiveness.
- The Lab has a performance evaluation process which includes the creation of an annual development plan. Efforts can be made to improve the use of this existing process to educate both managers and employees on the effectiveness of and availability of training resources which may be used to fulfill these plans.
- There is a willingness to review the Lab's new employee orientation program and improve it to include role-specific courses and expand OCFO training programs to non-financial professionals where warranted.

Threats

- There are technical hurdles to the UCOP/LBL LMS system deployment. If these hurdles cause the Lab to abandon the implementation of the system, the opportunities it provides will be nullified. The existing patchwork of training deployment systems will be the only means available for at least a year.
- Laboratory funding for training may be reduced which will limit the scope of accomplishment of goals and objectives completed in the OCFO overall strategic plan and this OCFO Training strategic plan.
- Functional OCFO managers do not embrace the integration of strategic training plans and practices and continue to provide training in a separate manner.



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STRATEGY

To meet the vision and mission of the OCFO and OCFO Training, the following strategies will be employed:

PROVIDE EMPLOYEES A CLEAR ROADMAP FOR THEIR NEW AND CONTINUING EDUCATION

1. Create role-specific curriculum plans for OCFO employees and Lab employees who have critical financial management responsibilities. These plans will be published in a central location and available for all employees and managers review and action.
2. Create an OCFO employee development program that is effective for individual contributors, supervisors/managers and OCFO senior leadership. The program will define desired standard and leadership competencies, map specific learning opportunities based on individual assessments and can provide goals for recruitment and personal development plans.
3. Create a new OCFO new employee/manager orientation process.
4. Contribute to the creation of a new Lab employee orientation process.

HELP EMPLOYEES FIND RELEVANT TRAINING COURSES AND RELATED INFORMATION QUICKLY AND EASILY

1. Consolidate the OCFO electronic training delivery platform into a “one-stop” shop for finding training events and materials in order to make it easier for learners to find answers to questions and mandatory learning activities.
 - a. The OCFO Website shall be updated to provide links to all existing and relevant training pages and activities for OCFO staff and customers.
 - b. The SumTotal LMS will be the ultimate go-forward platform. The OCFO will drive to move courses, automate curriculum plan assignment and catalog all courses to assist learners in obtaining training easier.
2. Develop a communication plan template for training activities and training program updates that maximizes the laboratory’s current communications infrastructure.



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INCREASE THE NUMBER OF TRAINING OPPORTUNITIES AVAILABLE TO EMPLOYEES TO INCREASE KNOWLEDGE OF FINANCIAL SYSTEMS, PRACTICES, AND CAREER DEVELOPMENT

1. Conduct an OCFO-wide inventory of courses currently available.
2. An OCFO course development and prioritization tracking process shall be instituted to determine how training requests and needs will be developed and in which order. This process will include an intake process, media selection decision trees, and where possible, a quantitative ranking algorithm for prioritization. A publication will be developed and updated monthly to provide visibility to managers and stakeholders in order to allow access to all stakeholders to see the projects in process, their priority, and completion status.
3. Provide additional training opportunities through web-conferencing, self-paced eLearning, and video.
 - a) Regular “Chalk Talk” sessions delivered via web-conferencing highlighting one policy, process, or system per month. Session to be recorded for future viewing
 - b) Interactive short courses (≤ 1 hour) delivered via web-conferencing
 - c) Modular courses delivered via eLearning
 - d) Institute a regular video or web conference series highlighting a functional area of the OCFO

INCREASE THE QUALITY AND RELEVANCY OF TRAINING EVENTS

1. Develop a courseware development process that provides consistency to developers, subject matter experts, and learners in which the final outcome is courses developed in an efficient manner, are easily maintainable, and available to learners in a relevant timeframe.
2. Develop and implement a Train-the-Trainer program for ad hoc trainers within the department. This program will be modularized for physical and virtual classroom trainers.
3. Develop a training measurement process and goals to ensure that training provided is timely, relevant, and effective from both learner and management perspectives.
4. Develop a virtual presenter education program to help presenters be more effective when conducting presentations via web-conferencing.
5. Field a bi-annual survey regarding training effectiveness, service, and needs should be done by the OCFO in order to assess our general view within the laboratory and the OCFO success in it's stated value to “prove to them [our customers] that given the choice, they would come to us first [for services].”



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COORDINATE WITH OTHER TRAINING PROFESSIONALS IN THE LAB, THE UC SYSTEM, OTHER NATIONAL LABS, AND THE PRIVATE SECTOR TO MAXIMIZE EFFECTIVENESS AND PROFESSIONAL LEARNING OPPORTUNITIES IN ORDER TO BE A LEADER IN TRAINING EFFORTS AND PRACTICES.

1. As there are training professionals in several Lab divisions, it will be advantageous to provide a semi-annual or quarterly symposium hosted by OCFO training which allows for the sharing of best practices, resolution of training challenges, reports on conferences attended, new technologies available, and even recommendations on overall future Lab training practices. By end of 2010, OCFO training will coordinate and facilitate the first of these symposiums at which others will be planned.
2. Reach out and work with other training professionals in the UC and National Lab system to determine commonalities/difference in programs and work to share best practices in order to benefit OCFO Training and the training community at large.
3. Attend a minimum of two conferences per year hosted by leading training industry professionals in order to assure the Lab and related training communities are aware of the latest technologies and best practices available. By the end of 2010, the Lab should be a presenter/session facilitator at a minimum of one conference per year to allow the Lab to gain visibility to the general training community as a leader in training as well as research.