

On the Job Training (OJT) Action Plan - SAMPLE

The purpose of this document is to instruct the OJT trainer on how to complete this form. Sample language is *italicized*.

Trainee Name: *John Doe* Classification: *Staff Services Manager I* Working Title: *Operations Manager*

OJT Trainer Name: *Sally Sue* Classification: *Staff Services Manager II* Working Title: *Section Chief, Operations*

OJT purpose: The purpose of this OJT is to document John Doe's OJT supervisor training as permitted by Government Code 19995.4.

Start and end date	Training Topics	Steps and method used to train each topic	Total hours used to train this topic
2/23/15	1. Role of the Supervisor	1.1 – Trainer - Defined the state's leadership philosophy, values, and competencies for a successful supervisor/leader in state service. Task performed to validate learning - Trainee can define how their behaviors model the values.	3
		1.2 Trainer - Described how to work with different personality types in the organization. Task performed to validate learning - Trainee was asked how the different personality types in their unit affect the how they would communicate new policies to the unit.	2
		1.3 Trainer - Described how a supervisor/ leader has to motivate staff through visionary leadership. Task performed to validate learning - Trainee was asked to develop a vision and discuss it with their staff, then we met to discuss the outcome of the conversation.	2
2/18/15	2. Techniques of Supervision	2.1 Trainer – Trained how to establish and maintain effective collaborative relationships. Task performed to validate learning - Trainee was asked how they would develop and maintain relationships with stakeholders.	1

Start and end date	Training Topics	Steps and method used to train each topic	Total hours used to train this topic
		<p>2.2 Trainer - Trained ways to provide and receive feedback. Task performed to validate learning -Trainee was asked to provide feedback to an employee's issue memo.</p>	.5
		<p>2.3 Trainer – Trained strategies to develop high performing teams. Task performed to validate learning -Trainee was asked to apply strategies for developing a high performing team when they returned to work. We had an interactive conversation to discuss the progress.</p>	.5
3/05/15	3. Planning	<p>3.1 Trainer – Trained delegation techniques to the team so organizational goals and objectives can be met. Task performed to validate learning -Trainee was asked to identify effective delegation techniques and then apply them back on the job. We had an interactive conversation to discuss the progress.</p>	.5
		<p>3.2 Trainer – Trained techniques to manage “your time” and “your staff’s time”. Task performed to validate learning -Trainee was asked to identify which time management technique worked best for them and their team.</p>	1.5
		<p>3.3 Trainer – Trained techniques for developing and using metrics, including collection of data and alignment with organizational initiatives. Task performed to validate learning -Trainee applied techniques for developing and using data metrics.</p>	1
1/16/15	4. Organizing	<p>4.1 Trainer – Identified techniques for organizing workspace through a job aid. Task performed to validate learning - Trainee spoke with the Department’s ergonomics single point of contact to determine the best approach and resources to help their staff organize their workspace.</p>	.5
		<p>4.2 Trainer – Provided a completed staff work refresher training and showed the trainee how to organize issue memos. Task performed to validate learning -Trainee was asked to have a conversation with their staff on completed staff work and we discussed the outcomes.</p>	.5

Start and end date	Training Topics	Steps and method used to train each topic	Total hours used to train this topic
		<p>4.3 Trainer – Trained process mapping and other techniques of identifying and eliminating waste in the work stream. Task performed to validate learning - Trainee process mapped their unit's operations, then walked me through the process they took with their staff, and identified wasteful process steps.</p>	1
1/19/15	5. Staffing and Controlling	<p>5.1 Trainer - Described the state's and department's recruitment and hiring process. Task performed to validate learning - Trainee successfully process flowed the state's and the department's recruitment and hiring process.</p>	1
		<p>5.2 Trainer - Describe or apply best practices in hiring a diverse workforce. Task performed to validate learning - Trainee applied best practices in hiring a diverse workforce as they developed their application scoring criteria.</p>	1
		<p>5.3 Trainer – Explained the department's onboarding process. Task performed to validate learning - We met and the trainee clearly articulated the department's on boarding process and their program's onboarding process.</p>	1
1/20/15 – 1/22/15	6. Performance Standards	<p>6.1 Trainer –Described and discussed how to apply California's five step performance management system. Task performed to validate learning - Trainee applied five step performance management system during a performance discussion with their team.</p>	2
		<p>6.2 Trainer – Trained methods for setting performance standards and expectations. Task performed to validate learning - Trainee understood methods of setting performance standards and expectations and met with their team to discuss.</p>	.5
		<p>6.3 Trainer - Identified ways to set and monitor team goals. Task performed to validate learning - Trainee met with team and applied goal setting and monitoring techniques. At the next meeting, the trainee explained the process.</p>	.5

Start and end date	Training Topics	Steps and method used to train each topic	Total hours used to train this topic
4/01/15	7. Performance Appraisals	7.1 Trainer – Identified the state’s performance appraisal documents and described the purpose and benefits of performance appraisals. Task performed to validate learning - Trainee was asked to repeat the process the next time they appraised an employee’s performance, then meet with me to discuss the outcome.	.5
		7.2 Trainer - Identified the steps in applying the State’s Performance Evaluation System. Task performed to validate learning - The trainee successfully applied the State’s performance evaluation system during a mock situation.	.5
		7.3 Trainer – Identified strategies for providing effective feedback. Task performed to validate learning – The trainee met with a member of their staff to provide feedback on an assignment using the techniques trained.	2
4/14/15	8. Equal Employment Opportunity	8.1 Trainer – Reviewed the department’s equal employment opportunity statement. Task performed to validate learning – The trainee recited the department’s equal employment opportunity statement and articulated how it applied in the workplace.	1.5
		8.2 Trainer – Showed the trainee a video proving the value of diversity in the workplace. Task performed to validate learning - The trainee successfully completed a mock scenario illustrating how diversity plays a role in the department.	.5
		8.3 Trainer – Asked the trainee to review plans that identify how to recruit a workforce that reflects California’s population. Task performed to validate learning - The trainee applied techniques identified in the department’s recruitment plan to increase diversity in their unit.	1
4/15/15	9. Discipline	9.1 Trainer – Met with the trainee and the performance management and labor teams to discuss the progressive discipline process. Task performed to validate learning - The trainee walked me through the progressive discipline process.	2

Start and end date	Training Topics	Steps and method used to train each topic	Total hours used to train this topic
		<p>9.2 Trainer - Described the supervisor's/ leader's role in the progressive discipline process. Task performed to validate learning - The trainee walked me through the progressive discipline process and identified how to increase efforts in the preventative phase so less time will be needed in the corrective or adverse phases.</p>	.5
		<p>9.3 Trainer - Explained to the trainee when and how to guide an employee through progressive action. Task performed to validate learning - The trainee walked me through the progressive discipline process and identified when to apply corrective and adverse phases.</p>	.5
4/02/15	10. Labor Relations	<p>10.1 Trainer – Asked the department's labor team to explain the “Ralph Dills” act and the role does it plays in state employment. Task performed to validate learning - The trainee met with department's labor team to discuss the “Ralph Dills” act and identify its major components.</p>	1
		<p>10.2 Trainer – Introduced the trainee to the bargaining unit contracts, what they are responsible for as supervisor/leader, and where to find them on the CalHR's website. Task performed to validate learning - The trainee researched and we discussed the bargaining unit agreements applicable to their staff.</p>	1
		<p>10.3 Trainer – Asked the department's labor team to describe the circumstances under which employees are entitled to union representation. Task performed to validate learning - The trainee completed a post training test and successfully identified the situations when employees are entitled to union representation.</p>	1
4/22/15	11. Employment Law Relating to Persons with Disabilities	<p>11.1 Trainer - Describe the key components of the Americans with Disabilities Act (ADA) and provided the employee with a copy of the law and a fact sheet. Task performed to validate learning - The trainee successfully passed a test which asked them to identify key components of the ADA.</p>	1

Start and end date	Training Topics	Steps and method used to train each topic	Total hours used to train this topic
		<p>11.2 Trainer – Described how the employee recognizes and engages in the reasonable accommodation interactive process. Task performed to validate learning - The trainee successfully passed a test on the reasonable accommodation process.</p>	2
		<p>11.3 Trainer - Identified the state’s resources for hiring, retaining, and promoting applicants and employees with disabilities. Task performed to validate learning - The trainee successfully developed and implemented a program plan for hiring and retaining employees with disabilities and collaborated with the department’s disability advisory council to identify ways of modifying work so it is more ADA compliant.</p>	2
4/02/15 - 4/10/15	12. Grievances	<p>12.1 Trainer – The department’s labor team met with the trainee to describe the grievance process and the supervisor’s / leader’s role. Task performed to validate learning - The trainee successfully passed a test which asked them to identify scenarios where the supervisor had a role in the grievance process and what that role was.</p>	1
		<p>12.2 The department’s labor team met with the trainee to describe the differences between a contract grievance and a complaint or policy grievance. Task performed to validate learning - The trainee differentiated the contract and complaint or policy grievance to the department’s labor team.</p>	1
		<p>12.3 Trainer – The department’s labor team met with the trainee and identified resources available if a grievance is filed. Task performed to validate learning - The trainee met with the labor team a week later and successfully identified three resources available if a grievance is filed.</p>	1
Total amount of time spent on OJT			40

Comments about the OJT:

At the conclusion of the OJT, the trainee and trainer must sign below to certify the training is completed. A copy of this document must be provided to the trainee and included in their training file.

Trainee Signature: _____

Date: _____

Trainer Signature: _____

Date: _____

Upon conclusion of the OJT

The supervisor below has discussed this document with the trainee and the trainer and the supervisor understands the trainee's performance level.

Supervisor Signature: _____

Date: _____