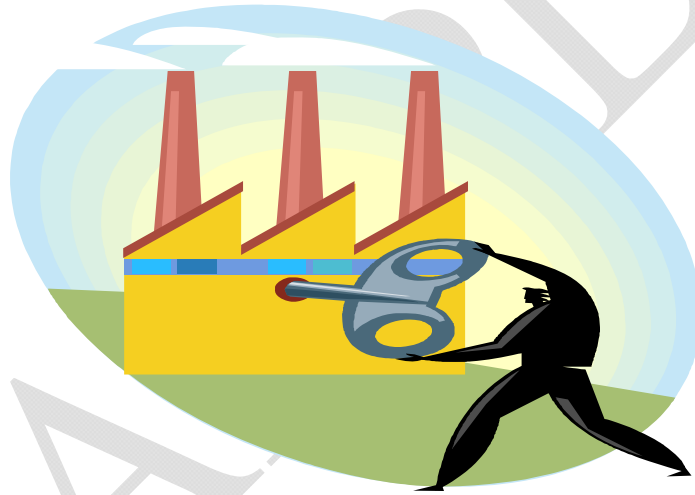




STRUCTURED ON-THE-JOB TRAINING SYSTEM

O-J-T SENIOR TRAINER COMPONENT



PREVIEW PACKAGE

A Competency-Based Approach for Improving the Quality of On-the-Job Training

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INTRODUCTION

Thanks for considering implementing the O-J-T Senior Trainer Component of the National Institute for Metalworking Skills (NIMS) Structured O-J-T System in your company.

We are pleased to provide this Preview Package of the Component to facilitate your decision-making. The package consists of the following elements:

- O-J-T Senior Trainer Component Overview
- O-J-T Senior Trainer Competencies
- Self-Directed Workbook Sample
- Performance Demonstration Report Sample
- Theory Exam Sample
- Implementation Guide
- Component Order Form

The O-J-T Senior Trainer Component provides a systematic and rigorous framework that your company can use to achieve dramatic improvements in the quality of its O-J-T. The primary benefits that you will get by implementing the Component are:

- ✓ Credentialed and certified O-J-T senior trainer
- ✓ Better trained O-J-T trainers and employees
- ✓ More effective and efficient O-J-T training process
- ✓ Enhanced employee performance
- ✓ Increased organizational productivity

We are confident that you will want to implement this Component after you have reviewed the Preview Package. To purchase the Component, complete the order form at the back of this Package and fax or mail it back to NIMS at the address on the form. Or, if you prefer, log on to NIMS website (www.nims-skills.org), go to the Products section and click on "Structured O-J-T System: O-J-T Senior Trainer Component"

I. O-J-T SENIOR TRAINER COMPONENT OVERVIEW

The **O-J-T Senior Trainer Component** of the NIMS Structured O-J-T System has been developed through the direction and input of an Expert Panel of industry stakeholders. It has also been pilot tested with a group of metalworking companies of all sizes and types from across the nation.

Component Focus

The O-J-T Senior Trainer Component has been designed to meet the distinct needs and requirements of the qualified Subject Matter Expert (SME) who is an experienced O-J-T trainer who leads the development, assessment and mentoring of new and incumbent employees and other O-J-T trainers within area of responsibility.

Component Parts

The O-J-T Senior Trainer component is comprised of three parts:

- *Self Directed Workbook* (provides training and development material)
- *Performance Demonstration Report* (used to assess O-J-T competencies)
- *Theory Exam* (used to test O-J-T knowledge)

NIMS Certification of O-J-T Senior Trainer

Each candidate who successfully completes this component will receive the NIMS O-J-T Senior Trainer Certificate. To achieve certification, your candidate follows a simple three step process:

1. Acquires the basic **training knowledge** by completing the *Self-Directed Workbook*.
2. Demonstrates the essential **training skills and abilities** required to complete the *Performance Demonstration Report*.
3. Proves **training subject matter expertise**, by taking and passing the *Theory Exam*.

After these steps are completed successfully, the candidate is awarded the NIMS Certificate. The NIMS Certificate is recognized nationally and provides evidence that the individual has the core competencies required to perform the O-J-T function in a high quality manner.

II. O-J-T SENIOR TRAINER COMPETENCIES

The O-J-T Senior Trainer Component is competency-based. This enables the O-J-T Senior Trainer candidates to proceed at their own pace through the learning and application process.

The Expert Panel identified nine core competency areas for the O-J-T Senior Trainer:

- **O-J-T Development**
- **Job Aids**
- **Training of O-J-T Trainers**
- **Training Methodology**
- **Communication**
- **Coaching**
- **Adult Learner**
- **Mentoring**
- **Multiple Task Management**

O-J-T Development Competencies

- Performing a task analysis
- Conducting a needs assessment
- Preparing Individual development plans
- Doing performance assessment and monitoring
- Measuring and reporting results

Job Aids Competencies

- Writing a variety of job aids
- Developing checklists

Training of O-J-T Trainers Competencies

- Recruiting and selecting trainers
- Developing training
- Delivering training
- Evaluating training

Training Methodology Competencies

- Implementing the four step O-J-T training process
 - Show
 - Tell
 - Do
 - Check
- Reporting on training outcomes

Communication Competencies

- Utilizing active listening skills
 - Sending and receiving message
 - Giving clear directions and instructions
 - Checking for understanding
 - Acknowledging understanding
 - Giving and receiving feedback
- Overcoming communication barriers

Coaching Competencies

- Instilling and reinforcing positive behavior
- Establishing environment conducive to learning
- Representing company policies and procedures (including safety)
- Taking ownership for trainee progress
- Maintaining focus on desired learning outcomes

Adult Learner Competencies

- Treating trainees like adults
- Applying adult learning principles
- Adhering to adult learning guidelines

Mentoring Competencies

- Helping the employee to link with and understand company goals and culture
- Using full range of O-J-T skills to modify behavior and deal with problem areas
- Facilitating succession planning

Multiple Task Management Competencies

- Scheduling and coordinating O-J-T tasks
- Ensuring compliance with safety/company procedures
- Acting as liaison for administrative correspondence

III. SELF-DIRECTED WORKBOOK SAMPLE

The Self-Directed Workbook is the centerpiece of the O-J-T Senior Trainer Component. The Workbook is unique. It is designed so that your candidates can use it independently to gain the knowledge to be an O-J-T Senior Trainer.

Competency Modules

The heart of the Workbook is its nine competency modules:

- **O-J-T Development**
- **Job Aids**
- **Training of O-J-T Trainers**
- **Training Methodology**
- **Communication**
- **Coaching**
- **Adult Learner**
- **Mentoring**
- **Multiple Task Management**

Module Structure

Each module includes the following:

- **Learning Objectives** – describe what a candidate will be able to do upon successful completing the module
- **Assessment Activity** – allows candidate to assess initial knowledge and perspective before beginning the module
- **Content Pages** – present the training information for the module
- **Learning Activities** - enable the candidate to interact with and apply the module's content to "learn by doing"
- **Review Activity** – allows the candidate to reflect upon what has been learned and the insights gained by completing the module

- **Review Questions and Answers** – test the candidate’s understanding of selected module content
- **Application/Implementation Aids** – provide tools that the candidate can use to apply and implement the module content

The **Table of Contents** from the Workbook and sample pages from **Module 1: O-J-T Development** follow.

SAMPLE

O-J-T SENIOR TRAINER SELF-DIRECTED WORKBOOK

TABLE OF CONTENTS

FOREWORD.....2

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O-J-T SENIOR TRAINER COMPETENCIES.....7

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MODULE 2: JOB AIDS.....36

MODULE 3: TRAINING OF O-J-T TRAINERS.....52

MODULE 4: TRAINING METHODOLOGY.....80

MODULE 5: COMMUNICATION.....102

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MODULE 8: MENTORING.....155

MODULE 9: MULTIPLE TASK MANAGEMENT.....173

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SAMPLE

MODULE 1: O-J-T DEVELOPMENT

“When I hear, I forget. When I see, I remember. When I do, I understand.”
-Confucius



OVERVIEW

This module provides a systematic framework for developing O-J-T programs for your area of responsibility. It sets out the stages and steps in that framework and presents tools that can be used to implement the framework in an organized and consistent manner.

LEARNING OBJECTIVES

As a result of completing this module, you will be able to:

- List the three stages of the structured O-J-T framework
- List and define the major steps in each stage of the framework
- Conduct a task analysis
- Set task standards
- Identify trainee needs

SAMPLE

ACTIVITY 1.1. O-J-T DEVELOPMENT ASSESSMENT

Before you begin this module, review the 10 steps listed in the table below and rate your level of experience and expertise on each step as either “High, Medium or Low.”

<u>O-J-T Development Steps</u>	<u>Experience</u>	<u>Expertise</u>
1. Identify jobs for O-J-T		
2. Conduct task analysis		
3. Set task standards		
4. Identify skills and knowledge requirements		
5. Develop training plan		
6. Identify trainee needs		
7. Schedule training		
8. Prepare to train		
9. Do the training		
10. Evaluate and review O-J-T		

- Review your ratings. Overall, how would you assess your experience in O-J-T Development? Overall, how would you assess your expertise?

- Given your ratings, what are the two or three steps that are most important for you to concentrate on in working on this module?

STRUCTURED O-J-T FRAMEWORK

O-J-T is the primary means that many companies use to promote performance and productivity from all members of the workforce – both new and experienced.

The best way for you as a Senior Trainer to ensure that this O-J-T training is done well and achieves the desired results is to implement a systematic and structured O-J-T framework that is adhered to rigorously. This module presents a three stage framework for accomplishing this.

O-J-T STAGES

- **STAGE ONE: PLANNING**
- **STAGE TWO: IMPLEMENTATION**
- **STAGE THREE: EVALUATION**

The steps in each of these stages are listed and defined on the pages which follow.

Review the stages and each of the steps and compare them to the current practices and needs in your area of training responsibility. Then, customize and adjust the framework to make it work best for you and your company's particular situation.

Stage One of the O-J-T Framework is doing the proper planning to establish the parameters for a systematic O-J-T program for your area of responsibility. There are six steps in this phase:

STAGE ONE: PLANNING

- 1. Identify Jobs for O-J-T**
- 2. Conduct Task Analysis**
- 3. Set Task Standards**
- 4. Identify Skills and Knowledge**
- 5. Develop Training Plan**
- 6. Identify Trainee Needs**

To begin our analysis of this stage, let's focus on the first two steps.

- **Step 1: Identify Jobs for O-J-T.** In this step, you determine which jobs should be part of the O-J-T program. Remember that O-J-T is not just for new employees. If you have conditions in your area such as high scrap rate, accidents, or new equipment, they may be indicators of the need for O-J-T.
- **Step 2: Conduct Task Analysis.** The task analysis provides the foundation on which an O-J-T program is built. The task analysis consists of detailing all the tasks that the average, competent employee must be able to do on the job. A task analysis typically consists of defining major tasks first and then breaking each of those tasks down into a sequential set of task elements. You should conduct an analysis for each job to be included in O-J-T.

Before we continue to the next steps, let's look at the task analysis step in more depth. Below is a list of the major tasks for a supervisor followed by a detailed and sequential list of the task elements for **Major Task 5. Trains employees.**

Supervisor Task Analysis Example

Major Tasks Listing

1. Assigns work.
2. Counsels problem employees.
3. Makes decisions.
4. Writes goals and objectives for section.
- 5. *Trains employees.***
6. Conducts yearly performance appraisals.
7. Gives positive feedback to employees.
8. Writes exception reports.
9. Holds meetings.
10. Assists in selecting new employees.
11. Records daily time Cards.
12. Coordinates work with other sections.

Major Task Detailing

5. Trains employee

- a. Determines training needs of individual employees.
- b. Schedules time for training.
- c. Does task listing.
- d. Does task detailing.

- e. Develops training plans
- f. Locates training aids.
- g. Trains.
- h. Follows up to determine whether training was adequate.
- i. Develops revised training plan to meet any needs that still exist.
- j. Retrains as necessary.
- k. Does paperwork.

As another example, below is a detailed listing for “soldering components” - one of the major tasks of an electronics technician.

Electronics Technician Task Analysis Example

Major Task Detailing

Soldering components

- a. Identify joint to be soldered.
- b. Select the appropriate iron and solder.
- c. Clean joint and tin if necessary.
- d. Place the iron on the joint.
- e. Apply the appropriate amount of rosin core solder to the joint
- f. Check and examine the joint; seal if necessary.
- g. Clean surroundings and replace tools when finished.

<u>Notes</u>

ACTIVITY 1.2. TASK ANALYSIS

Painter Task Analysis

Most of us have probably done painting at some point in our lives. One of the major tasks for a painter is refinishing wood. Use the space below to list in order all of the tasks that you can think of that are required to do that task effectively.

Task: Refinishing Wood

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

After you've completed your list, turn to the next page and compare it to the list there.

Task: Refinishing wood

1. Identify the type of wood to be refinished.
2. Select appropriate paint or finish remover.
3. Remove old finish with appropriate remover.
4. Sand and fill where necessary.
5. Apply stain, sealer, or other agent.
6. Apply finish coat of lacquer, paint, varnish, or some other finishing agent.
7. Smooth and polish when dry.
8. Repeat steps above as often as required for quality finish.
9. Check for color, smoothness, and completeness.
10. Clean work area and equipment.

Comparison Questions

- How many of the steps for this task did you have listed? What steps didn't you list?

- Did you have steps not listed?

- If so, how important are they?

Job-Specific Task Analysis

Finally, think about a job in your area of responsibility that you will be doing training on. Identify one of the major tasks for that job and list it in the space below. Then, enter in order all of the steps required to do that task effectively. Give your task analysis to a peer to review. Revise it, as required, based upon their input.

Task: _____

Steps/Task Elements Detailing

Task Analysis Peer Review Comments

IV. PERFORMANCE DEMONSTRATION REPORT SAMPLE

The Performance Demonstration Report (PDR) is the official report for documenting successful performance in meeting the NIMS skill requirements for the O-J-T Senior Trainer credential. The PDR defines the work history and experiences requirements for the O-J-T Trainer position. It also requires evaluation of the candidate's skills on all of the O-J-T competencies by a performance evaluator.

A sample of the format from the PDR used by the evaluator to conduct this assessment follows. The PDR is self-explanatory and contains complete directions for its use. You can receive a full PDR for review by contacting NIMS.

SAMPLE

O-J-T SENIOR TRAINER PDR SAMPLE

JOB INFORMATION

Candidate Name: _____

Nature of Structured O-J-T Program; _____

Number of O-J-T Trainees: _____

Other: _____

Competency Area	Process-Performance Standards	YES	NO
1. Structured O-J-T Program: Stage One - Planning	<ul style="list-style-type: none"> <input type="checkbox"/> Identified at least three jobs for O-J-T <input type="checkbox"/> Conducted task analysis for those jobs <input type="checkbox"/> Set task standards <input type="checkbox"/> Identified required skills and knowledge <input type="checkbox"/> Developed training plan <input type="checkbox"/> Developed required training materials <input type="checkbox"/> Assessed and identified trainee needs 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
2. Structured O-J-T Program: Stage Two - Implementation	<ul style="list-style-type: none"> <input type="checkbox"/> Scheduled training <input type="checkbox"/> Prepared to train – including recruitment and training of company O-J-T trainers <input type="checkbox"/> Ensured training delivery as scheduled 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
3. Structured O-J-T Program: Stage Three - Evaluation	<ul style="list-style-type: none"> <input type="checkbox"/> Monitored training delivery and assessed quality and performance as defined in the training plan. <input type="checkbox"/> Evaluated and reviewed the results of the O-J-T process <input type="checkbox"/> Prepared report for management summarizing and highlighting the O-J-T results 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

SAMPLE

V. THEORY EXAM SAMPLE

The theory exam is administered according to NIMS standard testing procedures. The procedures for registration and test administration are posted on NIMS website. The theory exam is open book and the candidate has 90 minutes to complete it.

Because of its use for testing and assessment purposes, the theory exam is not included with the O-J-T Senior Trainer Component material. However, the questions on the exam are similar to the Review Questions at the end of each module in the O-J-T Senior Trainer Self-Directed Workbook. Sample questions from the end of the O-J-T Development module included in this Preview Package follow.

O-J-T Development Module Sample Review Questions

1. There are 10 steps in the three stages of the Structured O-J-T framework. These include: conduct task analysis; prepare to train; evaluate and review O-J-T and:
 - a. Research alternatives
 - b. Investigate options
 - c. Do the training
 - a. Determine the consequences
2. A task analysis typically consists of
 - a. Breaking the job down into its major components and tasks
 - b. Defining major tasks first and then breaking those tasks down into a sequential set of task elements
 - c. Listing of all the tasks to be performed on a job
 - d. Identifying the key tasks in a job
3. The tool that is used to customize training to the needs of the trainee is called a:
 - a. Job Aid
 - b. Individual Development Plan
 - c. Personal Performance Enhancer
 - d. Training Evaluation Form

SAMPLE

VI. IMPLEMENTATION GUIDE

NIMS has prepared an Implementation Guide for the O-J-T Senior Trainer Component. The Guide is thoroughly documented and detailed and makes implementation of the Component a fail proof and painless process.

The Implementation Guide sets out the steps and provides all of the basic tools that you will need to administer the implementation of the Component within your company. It was developed based upon the direction of the industry Expert Panel that oversaw the creation of the Component and the experience of the companies that pilot tested it.

The Table of Contents for the Guide follows.

SAMPLE

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CONCLUSION

Thanks again for considering implementing the NIMS O-J-T Senior Trainer Component and reviewing this Preview Package.

We trust that you will see the value of the Component for your company. We look forward to being your resource for improving the quality and the results of your on-the-job training.

SAMPLE