



USAID
FROM THE AMERICAN PEOPLE

CORPORATE LEARNING STRATEGY (CLS)

2009 – 2013

Office of Human Resources
Training and Education Division
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United States Agency for International Development (USAID)

Corporate Learning strategy (CLS) 2009-2013

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Purpose

The purpose of the USAID Corporate Learning Strategy (CLS) is to provide the framework for addressing critical personnel needs and competency gaps, while ensuring that workforce training and development -- no matter where they take place in the Agency -- are appropriately aligned through policies and practices that stress collaboration, consultation, and facilitation. This Agency guidance is meant to increase training's effectiveness, reduce unnecessary duplication of effort, and promote operational readiness. These are all requisites to making sure that the USAID has the right people in the right place at the right time with the right skills.

This Strategy is concerned with USAID's:

- positioning as a world-class foreign assistance and international development organization, trusted and respected for its leadership, technical skills, innovations, and culture of learning as exemplified by its human capital;
- evolving and complex role as an integral pillar in America's national security strategy that is based on diplomacy, defense, and development (the 3 "Ds");
- capacity to meet current and future objectives with a workforce that has a narrow middle management band, a substantial reduction of expertise and experience due to retirements, and significant new junior-level entrants;
- need to be more strategic in its deployment and support of staff, as it works with its partners in the Departments of State and Defense, particularly in crisis, fragile and language designated countries.

Strategy Drivers

Skills required of the 21st Century USAID will be different, primarily because it will be operating in a different environment, coordinating with different partners, and pursuing different missions. Its "business model" is changing to accommodate these emerging realities. For example, one part of the new business model seeks to reduce reliance on "leased" expertise in favor of growing and deploying its own in-house technical capacity. Another aspect of the Agency's new business model is exploiting the favorable leverage potential inherent in joint ventures with private sector partners. As the rebuilding of USAID proceeds, it embraces the use of information and communication technologies (ICT) which give the Agency new capabilities, makes it more competitive, helps it work smarter, act more nimbly, and positions it to better support the learning and performance needs of its workforce. These shifts in the Agency's approach to its work are driven by a number of external and internal factors. This section discusses those drivers and, in italics, summarizes their implications on workforce learning strategies. .

a. International Commitments

1. Millennium Development Goals

In 2000, the United Nations Development Program (UNDP) inaugurated the *United Nations Millennium Declaration*. This Declaration included eight *Millennium Development Goals* (MDG) to be accomplished by 2015 or 2020. This marked a significant milestone in international development. For the first time, poverty alleviation and related challenges were targeted as the main development goals to be met, along with defined targets and indicators. The effects of America's commitment to the MDGs were noted by the Department of State's Deputy Secretary Lew, who observed that FSOs will be required to:

Provide development leadership, technical knowledge, and policy advice, build partnerships with the private sector and civil society, and manage development program resources, working in alliance with country teams.¹

In tandem with USAID's program of recapturing internal technical expertise so its field personnel can provide direct support to host countries (rather than rely on outside contracted services), the Agency's learning and professional development strategies must be correspondingly realigned, focusing more on supporting in-house technical expertise, rather than the current model which emphasizes management of assistance instruments. This commends closer consultation, collaboration, and cooperation with and between the Corporate Training Division and Agency leadership and technical bureaus.

2. The Paris Declaration and Accra Agenda

In 2005 the United States Government (USG), along with 200 other countries, signed the *Paris Declaration on Aid Effectiveness* ("Paris Declaration"). Signatories committed to five key principals: (1) ownership of development strategies, plans, and programs by developing countries; (2) alignment of development assistance with countries' strategies, systems and procedures; (3) harmonization of donors' actions; (4) managing for results; and (5) mutual measurable accountability. For the U.S., with its international development resources spread among many different agencies (USAID only accounts for 46% of the USG's international development budget), implementation of the Paris Declaration is diffused. Nonetheless, with the adoption of the concept of "smart power"², and with a series of progress assessments coming up in 2010 (Columbia) and 2011 (South Korea), USAID's leadership will be a critical determinant of USG success.

The Agency has shifted its business model to accommodate these principles, and training of future (and current) FSOs and FSNs must emphasize the skills needed to (a) assist

¹ Cable, "Expanding Civilian Capacity for Diplomacy and Development". REFTEL State 4183

² Secretary of State Hillary Clinton discussed "smart power" during her confirmation hearings. She defined it as using the full range of the USG's [hard and soft power] tools. http://www.usaid.gov/press/frontlines/fl_mar09/p2_nye.html. See also, "CSIS Commission on Smart Power: A Smarter, More Secure America." Center for Strategic and International Studies, Washington, D.C., 2008.

recipient countries design, monitor and evaluate development strategies and programs, (b) create productive, sustainable partnerships, and (c) consult and collaborate with other donors to optimize harmonization of efforts.

The 2008 *Accra Agenda for Action* ("Accra Agenda") examined the progress of Paris Declaration implementation, finding it to be less than adequate to meet expected goals. Accra Agenda signatories agreed to push for greater progress in three major areas: (1) country ownership; (2) creating effective partnerships; and (3) achieving, and openly accounting for, development results. One key finding was the importance of donor alignment with the development goals of partner countries as a driver of harmonization among donors. For USAID this underscores the value of its current model of leveraging its resources through public-private partnerships, as well as the challenge it faces to work more effectively with other donors operating in host countries. *Learning strategies must appropriately integrate these principles within the Agency's core and technical courses. To accomplish demands that the Corporate Training Division and USAID's leadership and technical bureaus frequently consult to ensure learning strategies and units of instruction are up-to-date and consistent with current plans, policies, and approaches.*

b. Evolving nature of development assistance

1. Private sector involvement

Over the past decade, there has been a proliferation of international development actors and stakeholders. Although development assistance continues to be dominated by major bilateral and multilateral government-backed institutions, there has been a noticeable shift of capital inflows from private sources in support of development. More and more public-private partnerships have emerged, as government and non-governmental organizations seek to leverage their financial resources through joint ventures with private enterprises. This has created a more fluid assistance environment, one calling for a more diversified and more efficient approach to matching solutions with development challenges. USAID has adopted the stance that it will seek to leverage its resources on behalf of host countries through partnerships with private interests. The Office of Partnership Development and the relationships developed through the Global Development Alliance have produced a wealth of data on identifying and structuring public-private partnerships. As a result, the Agency is now pursuing a more wholesale approach to creating alliances, focusing on development sectors, in place of its former transactional strategy. With the rebuilding of USAID, which emphasizes in-sourcing more technical capacity, Alliance Officers will provide the expertise necessary to implement productive partnerships. *From a training standpoint, instruction must be afforded all field personnel on the basics of developing and managing public-private partnerships, working with and/or through Alliance Officers.*

2. Inter-Agency Collaboration

USAID is the development pillar in the USG's foreign policy and national defense strategies. Its major partners are the Departments of State and Defense. In addition to other areas of collaboration, the Agency is helping stand up and support two high priority projects -- the Civilian Response Corps and the Afghanistan-Pakistan (AfPak) Initiative.

The *Quadrennial Review*, currently underway, will further rationalize the respective roles and responsibilities of the three partners, for these activities and others. Also, USAID joins other USG agencies with international development-related portfolios, like the Departments of Commerce and Agriculture.

Preparing and supporting the Agency's workforce to effectively operate within inter-agency environments is critical. FSOs and FSNs must possess the knowledge, skills and abilities necessary to lead and work within the context of inter-agency partnerships. A 2009 survey asked Mission Directors to assess their inter-agency experiences.³ An overwhelming majority reported perceptions of marginalization by their partners.

Consequently, field personnel must be equipped to assert and manage USAID's development expertise, technologies and resources, consistent with the mission, goals, and objectives of each inter-agency agreement. Furthermore, so they understand how their jobs are aligned with the Agency's objectives, employees' individual development programs (IDPs) should include instruction on inter-agency relationships, policies, objectives, and activities.

3. Environments of uncertainty

In the face of the changes discussed above, and the expectation of continued change and complexity, USAID must adopt a more dynamic approach to workforce training and development. Such an approach could be characterized as more focused on developing and promoting technical skills, while imbuing learners with the capacity to be *adaptive*. It calls for expanding the toolkit of Foreign Service (FS) core competencies and the precepts and metrics used for assessing performance. Taking non-traditional and “stretch” assignments will enable staff to exhibit their technical and adaptive skills. Overall, the major emphasis during this era of rapid change must be to create and sustain a FS that is skilled in working within uncertainty, in innovating, in resource mobilization, and in working with varied stakeholders.

Mission critical role of Training

No longer is the traditional, instructor-led classroom considered the default method of training delivery. Research has shown that distance or e-learning may be just as valuable and effective as that achievable in a classroom – and at far less cost and with minimal workplace disruption. Likewise, blended approaches – combinations of self-directed or mediated e-learning and classroom sessions – have proven to be viable ways to deliver content. Self-directed courses are the most learner-centric and have the advantage of convenient and tailored delivery, pacing, and feedback.

USAID has taken substantial steps to balance its training mix to reduce its reliance – whenever practicable – on classroom-based learning. Instead, planning, organizing, and implementing instructional designs can draw from a host of delivery methodologies, to produce the type of experience that encourages learning and promotes Agency objectives.

However, no amount of innovation in philosophy, approach, or execution will succeed unless there is a fundamental shift in some perspectives about the role and value of

³ This survey is a part of a larger OHR project that is creating Mission Director career maps. It will be published in FY 2010.

training. Although the Agency supports the importance of training, and few would deny its worth, on the “ground” level there is often a disconnect. There are clear and convincing signals that training is not viewed as an essential part of the Agency’s work. These signs include:

- supervisors’ declining to release employees for training because of potential staffing shortages.
- insufficient funds for travel and related expenses; and
- unwillingness to commit to 30-45 day enrollment deadlines.

Hence, this strategy emphasizes that training’s role and value be elevated and the legitimate concerns imposed by daily workplace demands be addressed.

Training and career/professional development must be considered “mission-critical”. A mission-critical activity is one that is required to drive or support the overarching goal and priorities of an organization. Two recent changes to USAID’s strategy -- doubling its Foreign Service through the Development Leadership Initiative (DLI) and greater emphasis on working with non-Agency partners⁴ -- demonstrate the critical role of training to ensure objectives are met.

A mission-critical view of training also fosters better recruitment and retention results. USAID’s success will be heavily influenced by its ability to attract and retain a well-qualified and actively learning workforce.

It is not enough to present training and development as mission-critical. There must be aggressive corporate promotion of this position, which would include:

- increasing the prominence of training investments by supervisors and managers as a factor in annual performance evaluations;
- creating an appropriate training float; and
- requiring budgets be aligned to planned training events and requirements.

Recently, the Department of State pointing to its strong training and career development programs, reported one of the lowest turnover rate in the federal government. At State, there has been a fundamental shift in the way training is viewed. There are no excuses for not taking mandatory courses (for example, a leadership course is required at each grade level from FS-06 to FS-01). Foreign Service staff are not eligible for promotion unless they perform satisfactorily and take required training. Although USAID does not mandate management and leadership classes, it does “highly recommend” that they be taken. Strategically, it may make sense to re-visit this policy and opt for making promotions contingent upon successful completion of prescribed competency-based learning opportunities. In a similar vein, it might be prudent to look for ways to reward

⁴ This includes working with the Departments of Defense and State, as well as with non-governmental public and private sector partners.

supervisors and managers for the rates at which their staff complete various learning activities each year.

In response to concerns that training reduces on-board strength and may have a disruptive effect on the work unit for the period the learner is away, USAID will budget for a 14% training/assignment float (3% for Civil Service). This mirrors the Department of State's approach, begun under former Secretary Colin Powell. The rate of float above attrition is derived from USAID's own Comprehensive Workforce Planning Model (CWPM).

Strategic Principles

Given the challenges USAID faces, it is appropriate to re-think and re-fashion its approach to how it shapes and promotes the professional growth and development of its changing multigenerational workforce. To be effective in the 21st Century, the Agency's learning and development strategy must encompass:

1. Continuous Learning -- providing an array of learning options for its workforce, with the intent of empowering Foreign⁵ and Civil Service employees and their supervisors to identify and pursue activities that align with the Agency's mission and their own career development goals;
2. Right-Timed Learning -- learning activities must be appropriately timed and sequenced so that KSAs can be put to productive use as rapidly as practicable, in much the same way as the traditional concepts of on-the-job training (OJT) and job coaching;
3. Collaborative Learning Models -- research findings demonstrate the value of informal learning activities in promoting KSAs, so USAID's strategy will integrate opportunities for peer-to-peer collaboration through communities of practice, blogs, web-based networking, stretch assignments, and the use of new approaches like crowd-sourcing⁶ and wirearchy⁷;
4. Learning-Convenient Technologies -- with the advent of new, more powerful technology platforms, including MP3s (and iPods) and other mobile devices capable of accessing the Internet (i.e., Web-enabled), there is a plethora of programming options (e.g., podcasts and video-casts) for delivering content to the end user; and,

⁵ Includes Foreign Service Nationals that are, by far, the greatest number of USAID overseas workforce.

⁶ According to Wikipedia, crowd-sourcing is the act of taking a task traditionally performed by an employee or contractor and outsourcing it to an undefined, generally large group of people or community. USAID's Global Development Commons team successfully used this approach in its 2008 USAID 2.0 Challenge, when it initiated an open global competition inviting ideas on how to use mobile technology to "improve the way international development is done". SOURCE: "Karen Turner: Harnessing the Power of Mobile Devices". The Washington Post, May 11, 2009.

⁷ Wirearchy is the term used to denote the flattening of information and knowledge flows within an organization, using the interconnectedness of the Internet. Use within USAID implies encouraging systems or approaches that enable information to flow from workers no matter where they are in the organization's hierarchy.

5. Talent Optimization -- learning activities will not only ensure proficiency in the execution of core and technical competencies, they will also promote the KSAs necessary to be proactive, to anticipate, test, launch and assess solutions to the challenges endemic in evolving and complex situations (i.e., talent optimization fosters understanding, by not relying on "lessons learned", "after action reports" or "best practices", giving learners the confidence to stretch beyond units of instruction/learning).

USAID has adopted an aggressive policy to re-assert its leadership in international development after years marked by a decimation of its FSO ranks, greater reliance on the use of contracts and other assistance instruments to achieve strategic objectives, and sharp reductions in program and operating expense budgets that support training and development.

Like most employers -- public and private -- USAID's most experienced workforce members are retiring or reaching retirement age. The Agency is carefully preparing for this experience gap, as evidenced by its five-year leadership succession and workforce planning models. It will double its complement of FSOs by 2012, add additional FSNs, and increase the number of Civil Service (CS) employees. To mediate the loss of institutional experience and memory, USAID has initiated a number of interventions, including a Knowledge Management initiative, web-based collaboration portals (e.g., AIDSpeak and Developedia) and more robust opportunities to engage retired FSOs in Agency activities (e.g., STAR), and for senior staffers to provide coaching and mentoring.

Like the international development arena, much has changed in the field of training. Today, there is greater emphasis on *learning* and the application of *what is learned* as a primary objective, rather than *training*, to produce usable knowledge, skills and abilities (KSAs). This emphasis on learning is appropriate because it reflects these tenets:

1. learning can occur in any setting, and
2. high performing, knowledge-based organizations maintain organizational cultures of continuous learning.

There are new distance learning models and technologies, to complement or replace traditional classroom based, instructor-led courses. Also, with the ubiquitous nature and high utility value of the Internet, there are new options available to foster and support learning. They include the ability to pull learning to the employee's desktop and the capacity to disseminate knowledge through web-based collaboration (e.g., wikis, blogs, etc.).

This USAID CLS 2009-2013 is aligned with the Agency's transformation goals, and those contained in its Human Capital Management Strategy. Just like the Agency's aggressive reinvention campaign, this Strategy is a roadmap for re-engineering USAID's

approach to training and career/professional development. It starts with the perspective that USAID is a knowledge-based organization and that continuous learning must be an enterprise-wide shared value. It recognizes that the Agency's investments in learning should span the spectrum of formal, informal, and blended learning opportunities, and should incorporate the most appropriate strategies and technologies. Also, it acknowledges USAID's aim to assume leadership within the international development community, an effort which requires reformulating its approach to workforce training and development to ensure its current and future talent are prepared adequately, and given the support to perform successfully.

Case for Learning Investments

USAID has charted an ambitious course of renewal, and is implementing it during a time of rapid change worldwide. This is a period when knowledge enterprises compete fiercely for human resources, so it makes sense that the Agency would invest in developing the knowledge, skills, and attitudes of its people at every stage. Such investments promote recruitment and retention goals by demonstrating USAID's commitment to support each person's learning and career development efforts.

Given the need to have a highly-skilled workforce, and to fill critical current and projected gaps, strategically aligned investments in training are imperative. This corporate learning strategy makes the case for tailoring investments for optimum organizational impact and efficient acquisition of skills by individuals. It underscores the use of an Agency-wide representative structure (the TQAC) to rationalize training by (1) evaluating the content and method of delivery of 1/3 of the Agency's core and technical courses each year, (2) assessing new and revised course offerings to ensure appropriate alignment, and (3) approving performance indicators.

Overall, USAID benefits tangibly and intangibly for every dollar it invests in training and developing its human resources. Appropriately placed, training investments can be expected to lead to:

- **Faster change management results:** Learning facilitates the removal of barriers to change (i.e., oppositional mindsets, complacency, lack of competency, etc.). Through investments in learning, particularly in fast authoring technologies that can make training available almost anywhere, anytime, the Agency is better able to direct how change is to be positioned, adopted, implemented, and evaluated throughout the organization.
- **Maximizing work quality:** When USAID provides training solutions to meet identified needs, it can expect better, more consistent and accountable work performance. Such expectations are built into the front end of every learning opportunity (for example in course descriptions that list learning outcomes, competencies/skills to be acquired, and target audience). USAID has the infrastructure to determine training's impact on post-intervention workplace effectiveness, using course completion data, Annual Evaluation Reports (AERs), and structured interviews with appropriate stakeholders. Other ways of tracking

training and its impact on workplace performance is (or, will be) available through the Learning Management System, particularly when it's fully configured with 360 Assessments, competency models⁸ and related talent management capabilities.

- **Increased productivity:** When workforce members have the requisite knowledge and skills to perform, their productivity increases. Moreover, less time and effort is required of supervisors and managers when employees proficiently execute tasks. Finally, the direction, volatility and intensity of USAID's substantial investments in rapid staffing (e.g., DLI) and different inter-Agency programs⁹, requires a workforce that is competent and motivated to quickly and successfully adapt to a myriad of Agency priorities.
- **Greater job satisfaction:** Studies have shown that organizations that invest in training tend to have more stable and reliable workforces. The research shows that highly effective performing organizations make significant investments in employee development. This, in turn, leads to higher rates of reported job satisfaction, which corresponds to greater rates of retention. Higher rates of retention translate into reduced replacement recruitment and related training expenses.
- **Desirable Return on Investment (ROI):** Although the concept of training ROI continues to be debated, there is ample evidence that strategically linked training investments almost universally offer favorable returns. The "trick", though, is coming up with the valuation metric(s) for intangible returns characteristic of public service organizations. Nonetheless, research shows that favorable economic and other measurable returns are associated with timely investments in learning opportunities for workforce members.
- **Training efficiencies from Web 2.0 and other technology solutions:** As a knowledge enterprise, USAID must be able to efficiently provide learning opportunities to its worldwide workforce. A commitment to technology-based learning is already evidenced by USAID's funding of the LMS and the virtual USAID University. The investment "model" that led to the purchase and roll-out of the LMS, and the maintenance of the USAID University (with its purchased catalog of eLearning courses) must be updated.

Now, investments in knowledge acquisition can take advantage of appropriate newer technologies and practices -- using modalities more familiar with members of generations that have grown up with computers, MP3s, and smart phones. USAID's geographically far-flung operations requires training solutions that produce results, but do so in ways that accommodate the learning styles of workforce members, at times and through vehicles that encourage learning.

⁸ Some capabilities will come on-line in FY 2009-FY 2011.

⁹ Working with Civilian Response Corps Teams/Provincial Reconstruction Teams; Global Development Alliances and other public-private partnerships; and, inter-agency initiatives)

Instructor-led classroom training will not be completely eliminated. However, distance and self-directed asynchronous learning opportunities provide content to the "desktop" at any time, any place -- and, because there are no associated travel and instructor costs, the costs of production are quickly recouped.

- **Attaining the goal of leadership:** USAID operates in a worldwide "knowledge" industry, where similarly situated public and private sector players compete for the same "best and brightest" as the Agency. In today's world, knowledge is a coveted commodity. To achieve its overarching goal of preeminence in the international development community, USAID must be able to create, adapt, use, and institutionalize knowledge. Currently, this is being done through core training supported under the auspices of OHR/TE, and technical and mandatory trainings provided by the B/IOs.

Resources for learning must be substantially increased. In addition to the drivers cited above, a number of other factors justify the need to increase learning investments. For example, the Office of Personnel Management (OPM) and the Office of Management and Budget's (OMB) require training in supervision, leadership, contracting, and related competencies.¹⁰ There are reports published by the General Accountability Office (GAO) and USAID's own Office of the Inspector General.¹¹ And, there are extensive legal, regulatory, and policy provisions governing training investments, ranging from the GPRA of 1993 to the Automated Directive System (ADS).¹² Thus, even if no attempt was made to determine the return on training investments, there is sufficient statutory and policy justification for investing a substantial portion of the Agency's appropriations in developing the capabilities of its human capital.

Comparison of Enterprise-Wide Learning Systems

To design USAID's corporate strategy, the CTD examined other institutions with international portfolios that had strong workforce and leadership development programs. This review focused on policies, programs, and infrastructure.

A small sample was selected, comprised of federal and private sector organizations:

Federal	Exemplar/Best Practice
Dept of State/Foreign Service Institute	--FSO training
Dept of Homeland Security	--CLO and Advisory Board
Dept of Agriculture	--Marketing learning
Millennium Challenge Corporation	-- SOTA training facility

¹⁰ These are listed in OPM's [Training Policy Handbook](#).

¹¹ See Bibliography and Reference Sources at the end of this Strategy.

¹² Along with the *President's Management Agenda 2002*, the Government Performance Results Act of 1993 (GPRA) provides for the establishment of strategic planning and performance measurement in the federal government. Consequently, this Act is forcing many government organizations to establish metrics for expenditures and to report results.

Private Sector

Caterpillar Corporation
 Goldman Sachs
 Lockheed Martin

Exemplar/Best Practice

--Corporate university
 --Learning strategies
 --Leadership succession/
 --Center for Leadership Excellence

The CTD used best practices identified by the Office of Personnel Management, like C-level champion, learning advisory/governance body, organizational culture of continuous learning, and other features. These and other factors provided the overlay for comparing USAID with other progressive institutions with aggressive knowledge management and workforce learning and development strategies. .

ENTERPRISE NAME	TYPE	LEARNING CULTURE	CLO	C-LEVEL CHAMPION	LMS	UNIVERSITY	TRAINING FACILITY	CONTRACT TRAINING
Dept of State	Fed Gov	Y	N	Office of the Secretary	Y	Y	Y	Y
Dept Homeland Security	Fed Gov	Y	Y	Secretary	Y	Y	Y	Y
Millennium Challenge Corporation	USG Corp	N	N	None	Y	N	Y	Y
Dept of Agriculture	Fed Gov	Y	Y		Y	Y	Y	Y
Lockheed Martin	Corp	Y	N	CEO	Y	Y	Y	Y
Caterpillar Corporation	Corp	Y	Y	CEO	Y	Y	Y	Y
Goldman Sachs	Corp	Y	N	CEO	Y	Y	Y	Y
USAID	Fed Gov	N	N	None	Y	Y	Y	Y

USAID compares favorably on all key features of most rigorous training/learning management infrastructure and system, particularly:

- use of a corporate governance body;
- virtual university with extensive online offerings; and,
- Learning Management System.

However, unlike the Department of Homeland Security, Goldman Sachs, and Caterpillar, USAID does not have:

- C-level champion (OPM recommended); or
- “culture of continuous” learning guidance

All surveyed organizations had easy-to-access information about learning and career development opportunities. While others tout their extensive array of online learning

titles and number of seats, the Department of Agriculture devised an aggressive approach to marketing its courses. Its marketing campaign includes:

- email notifications to selected job series/classifications, supervisors and senior managers detailing training that might interest them;
- in-person and virtual briefings with field and HQ training coordinators, employee associations, and partners;
- strategic workshops for the Agency’s training community on AgLearn’s capabilities and ways of incorporating online training;
- top-level leadership presentations on the range of learning options offered by AgLearn;
- improved desktop presence, with a redesigned interface that better communicates AgLearn’s training opportunities; and,
- posters focusing on the major benefits and advantages offered by AgLearn.

Again relying on proven marketing techniques, AgLearn set out to learn more about each user segment. Using 40 data elements, obtained through email surveys, AgLearn was able to better target notifications. One tactic it found successful is based on the Amazon.com model. Notifications are targeted to former participants that say:

“If you liked this _____ course, then you will probably like _____.”

Another successful technique is the use of welcome screen “pop-ups”. This resulted in a 291 percent increase in course completions and a 2,205 percent increase in participation for those courses spotlighted.

USAID’s Strategy is designed to embrace all the features employed by others, as appropriate.

Present State

USAID’s approach to workforce development is somewhat compartmentalized, with a corporate division responsible for core and leadership training; pillar and geographic bureaus providing training in their respective fields of specialization; and Missions, offering on-the-job and related training. Currently, regional offices act as platforms for the offerings designed and funded by the corporate division or the bureaus/offices – although, there are instances where centers that operate regional programs will initiate and implement training for the benefit of all those within its geographic reach.

It makes perfect sense to have training planned by the organizational unit that has the *subject matter expertise* to do so. This fixes accountability for developing and managing technical competence at an appropriate level of the Agency. This includes:

- establishing baseline requirements (core and mandatory learning experiences);
- fixing learning and performance standards (beyond core competencies); and,
- ensuring technical learning strategies are aligned with USAID’s.

OHR/TE possesses the subject matter expertise to plan, design and implement Agency-wide learning programs, those that have cross-cutting interest and benefits, no matter what ones backstop or occupational category happens to be. This centralized function ensures that corporate standards for entry-level, supervisory, management and leadership training are uniform, widely-accessible, and form the basis for shared understanding of how each individual fits within USAID’s system. Devolved upon OHR/TE is the role of *central learning authority* – it not only provides training and related learning options, it also employs learning professionals who are capable of providing technical assistance and support to those units with subject matter expertise who wish state-of-the-art, high-impact instructional packages tied to their respective technical areas.

The OHR Training and Education Division is responsible for implementing Agency-wide learning solutions. These are considered *core* to effective operation of the Agency, management of its workforce, and development of its leadership. Core training includes:

- a. Orientation – for new employees
- b. Supervision and Management – learning packages for new, intermediate, and advanced-level supervisors and managers
- c. Leadership Development – programs designed for emerging leaders through Senior Executive Service level
- d. Mandatory – instruction mandated by law, regulation, or as earmarked to support surge and related special requirements
- e. Language – proficiency training

The content of core courses does not rely on the learner’s assigned technical area – these are corporate, cross-sector learning curricula, designed to meet certain objectives and delivered in a variety of ways to learners.

Figure: *Core Learning Packages*

<u>Orientation</u>	Introduces Agency’s mission, objectives, SOPs, etc., to new employees.	<u>Location:</u> HQ, online
<u>Supervision/Mgmt</u>	Supervisory/Management training required by federal regulation; mgmt training expands skills and knowledge base.	<u>Location:</u> Online, HQ, Regional
<u>Leadership Development</u>	Required by federal regulation and mandated by Agency policy; one-to-two week seminars, facilitated by FEI	<u>Location:</u> Online, FEI
<u>Mandatory</u>	Required to support a discretely defined <i>policy</i> (e.g., diversity) or, <i>certification</i> (e.g., activate/maintain Contracting Officer’s Technical Representative warrant), or, <i>special/surge initiative</i> (e.g., preparing to serve in Critical Priority Country).	<u>Location:</u> Online, HQ, Regional, mobile platform
<u>Language</u>	Required to be assigned overseas and to be tenured in the Foreign Service.	<u>Location:</u> Foreign Service Institute (FSI), online, mobile.

Core learning support functions, also performed by OHR/TE, include publishing annual Agency training catalog and periodic notices; administering the Learning Management System (LMS), with its competency and talent management modules, and virtual University; and, conducting and evaluating USAID-wide Training Needs Assessments (TNAs). OHR/TE is staff to the Training Quality Assurance Council (TQAC) -- the central body charged with general oversight of training.

Each Bureau and Independent Office (B/IO) designs its own learning strategy and implementation plan. These are tailored to the B/IO's needs, and – like the design and packaging of courses – tend to be produced with outside contractor assistance. Approaches to training vary. Some training is in the traditional instructor-led classroom mode. Increasingly the B/IOs are porting to e-Learning platforms. Also, blended instructional packages are becoming the norm, with learners required to complete one or more self-study modules, in addition to successful classroom participation.

Although there is an online catalog of distance learning courses maintained through the USAID University, more specialized, mission-oriented e-Learning solutions are often needed. The Global Health Bureau, for example, has commissioned a number of e-Learning packages, and has its own catalog. The Economic Growth, Agriculture and Trade Bureau (EGAT) has its own training needs, and is currently working to certify learners can demonstrate their technical capabilities in selected tracks, using professional development “maps” designed by the Bureau.

Competencies for each technical backstop are now available¹³, and will be used to produce truly competency-based learning strategies and programs. Over the course of many months, the staff of the CTD and each Bureau met to identify, define, test, and map competencies. This illustrates the type of collaboration, consultation, and cooperation envisioned by the Corporate Learning strategy. Continued joint efforts like competency mapping are aligned with sustaining a corporate culture of continuous learning.

Arguably the only corporate imprint on Agency-wide coordination results from USAID University's use of a centralized Learning Management System (LMS), and OHR/TE's management of the limited-function TQAC. Otherwise there is no formal Agency-wide system to coordinate learning designs, use of instructional media and tools, unifying and sequencing learning objectives, or other important approaches to harmonizing and rationalizing workforce training and development. Presently, cooperation, coordination, and shared learning activities are done on an *ad hoc* voluntary basis.¹⁴ As a result, learning and development activities are not seamlessly integrated throughout USAID.

¹³ Completed Q4 FY 2010.

¹⁴ Greater coordination of training was a key recommendation at the May 2009 South America Regional Support Services and Mission Directors Meeting held in Lima, Peru. (March 3-5, 2009).

Future State

The current state requires re-engineering to ensure more efficient and effective implementation of the Agency's workforce development objectives. According to ADS 458.1, "the objectives of USAID's training and career/professional development programs are to help achieve the Agency's mission and performance objectives by improving individual and organizational performance and to support the Agency's core values of *teamwork and participation, valuing diversity, customer service, results management and empowerment, and accountability.*"¹⁵ These goals can only be attained by fostering a *culture of continuous learning*, aligned to the Agency's mission, which in turn requires greater coordination, cooperation, and collaboration among organizational units. (See Business Model.)

The future state calls for more corporate guidance on, and support of, learning activities that occur at USAID's various sub-organizational units. This includes, but is not limited to:

- formal commitment by the Agency's leadership to the principles of highly effective learning organizations, asserting the primacy of continuous learning as essential to support USAID's leadership role in international development;
- fostering more coordination and collaboration without the B/IOs relinquishing their important positions as the subject matter experts charged with promoting technical excellence in their respective areas of authority;
- re-configuring the corporate training division (OHR/TE), providing it with the resources to better assist all parts of the Agency's develop and implement State-of-the-Art (SOTA) learning designs, coordinate learning plans, utilize effective learning aids and technologies, and more seamlessly integrate Knowledge Management with learning activities;
- updating the Agency's physical training facility and its ability to deploy effective learning technologies on a variety of platforms and giving it the capacity to better support distance and eLearning programs;
- utilizing regional training hubs to promote greater access for Foreign Service Officers and Foreign Service Nationals, reducing training related costs, hosting B/IO training, and facilitating DLI training;
- creating a training float to address the concerns of Missions and B/IOs about releasing staff to participate in scheduled learning activities; and,
- establishing a new career development system, one that maps core, technical, leadership, and management competencies, defines career ladders, and supports alternative learning models, like stretch assignments, temporary duty assignments (TDYs), and cross-training.

To reach the desired future state requires some fundamental changes. Just as the Agency is transforming itself, using new business models, working with new partners, and employing new development strategies, it must cultivate a new corporate workforce development culture. To ensure it is able to efficiently and effectively operate, USAID

¹⁵ Emphasis added.

must adopt a mindset that makes learning and knowledge management top priorities. In short, it must institute, resource, and foster a *culture of continuous learning*.

Critical to establishing such a culture is re-defining and re-positioning its division responsible for training and career development, making it the linchpin that ties together the disparate strategies and programs produced throughout USAID. This 5-year Corporate Learning strategy is an important step in that direction, because it outlines structures, processes, and procedures designed to facilitate greater cooperation, coordination, and collaboration Agency-wide.

The Agency's corporate division needs to be re-branded. It must be viewed by all as the central repository of expertise in all facets of learning, capable of guiding and supporting other organizational units. The quest to instill a culture of continuous learning would be enhanced by branding this corporate body the "Division of Learning and Development". By substituting "learning" for "training", USAID signals its intent to focus on, and value, what is learned, rather than what is taught in formal classes, workshops, and seminars. This recognizes that most workplace skills and knowledge are not acquired from completing classes. Learning is owned by individuals; training is owned by the purveyors of instruction. "Development" is substituted for "education" to signify USAID's concern that its human resources are afforded the resources and opportunities to grow professionally and personally, with clear guidance on career paths and options.¹⁶

These are the underpinnings of USAID's new corporate learning strategy. By 2013, these and other initiatives will produce a more comprehensive, unified and effective system for meeting the evolving learning requirements of the Agency, as well as the career and professional development needs of its human capital.

Responsibilities of Key USAID Stakeholders

This Corporate Learning strategy will leverage the Agency's training and development resources so they more efficiently reach and support workforce and workplace needs. It requires expanding existing infrastructure (to accommodate new learning technologies and approaches), broadening intra-Agency consultation, and continuously testing USAID's offerings and their impact on performance.

No strategy is complete without stakeholder concurrence, particularly around expectations. In this instance, there are three major internal stakeholders: (1) employees, (2) B/IO executives, and (3) corporate governance board (TQAC/OHR/TE).

1. Employees

To create and effectively use the power of knowledge, USAID's employees must commit to continuous learning, and be highly self-directed in acquiring and sharing knowledge. Individuals are responsible for their work place performance and

¹⁶ Throughout this Strategy, the terms "learning" and "training" are used interchangeably. Because the Strategy proposes re-naming OHR/TE, the term "Corporate Training Division" (CTD) is used as a proxy.

therefore responsible for securing and demonstrating competencies associated with their positions within the Agency. Having the requisite skills to satisfactorily perform is a baseline measure. But, as stated earlier, USAID requires a workforce whose members are committed to continuous learning. This is evident in the "up-or-out" policy of the Foreign Service side of the Agency and is consistent with the general merit promotion policies governing Civil Service employees. USAID provides the infrastructure and tools for career planning and promotion (e.g., IDPs, LMS, 360 Assessments, promotion boards, etc.). It is incumbent upon the individual to use these resources to plan and implement an appropriate learning strategy.

2. B/IO Executives and Managers

This leadership cadre is responsible for establishing and managing learning consistent with the competencies needed to meet the unit's strategic and operational objectives. Also, these are the Agency's primary drivers of innovation, and are expected to be its thought-leaders and best practice paragons (for their respective areas of specialization). Therefore, these senior-level officials are responsible for promoting and rewarding learning (and its subsequent workplace application) as a valued trait.

3. OHR/TE and the Training Quality Assurance Council (TQAC)

The TQAC acts as a corporate governing body, with broad representation throughout the Agency. Chaired by the Office of Human Resources Director/DAA, the TQAC meets quarterly.¹⁷ The Division of Training and Education is responsible for facilitating TQAC meetings and operations, which it does with contractor support. Together, the OHR Team and the TQAC are responsible for:

- standardizing training policies and practices throughout the Agency;
- assessing current and projected training needs and implementing appropriate solutions;
- evaluating and documenting training effectiveness;
- producing the Annual Training Strategic Guidance Report;
- referring issues that may significantly affect core, technical, and mandatory training to the Business Transformation Executive Committee (BTEC).¹⁸

Through the TQAC, OHR/TE will be better able to identify current and emerging needs and -- acting as an internal consultant -- fashion responsive solutions.

Notably, the Division (a) supports recruitment diversity efforts; (b) identifies and supports learning technology requirements; (c) interfaces with OPM, the General Services Administration, and other externals on training; (d) procures contractor assistance and assigns U.S. Direct Hire staff to perform contract administration functions; and (e) documents training evaluations. Comprised of only 6 direct hires, it performs many of its functions through contractors. The Agency's announced intention to sharply

¹⁷ The OHR Director also heads the Agency's Human Capital Management (HCM) system.

¹⁸ See TQAC Charter, February 2009.

reduce the use of contractors and other non-direct hire personnel, is consistent with its workforce planning strategy. A strategy that supports the notion that it is better to develop and maintain a permanent cadre of human resources than "lease" talent through contractors and consultants.

In the Agency's FY 2009-2013 Plan, there is a provision to increase OHR's service capabilities by adding direct hires -- primarily human resource specialists. The Division will be unable to take on significantly greater responsibilities (particularly in standing up and marketing new learning models and vehicles) without an upward adjustment of its permanent staff, and without reliable future funding. A proposed re-organization of the Division is provided in the Appendix.

The Strategy

CLS Goals and Objectives

The goal of the CLS is to support USAID's preeminence as a world-class, knowledge-driven, public enterprise that values and rewards continuous, lifelong organizational and individual learning.

CLS core values:

- Investing in human capital training and development is essential to promote excellent performance.
- Opportunities for training and development must be equitably afforded to all members of our workforce.
- All workforce members have an obligation to acquire knowledge, and to engage in teaching, coaching, mentoring, or other methods of expanding the Agency's knowledge/skills base.
- USAID values and supports learning, technical competencies, results, leadership, teamwork, and other demonstrable attributes that contributes to its mission, goals, and objectives.

The CLS is intended to expand the concept of USAID as a learning organization that is committed to empowering its human resources to continuously grow and develop professionally and personally. Alignment of the Strategy to the Agency's priorities is accomplished by broadening the TQAC's governance role, by having a C-level champion, by actively soliciting input from the B/IOs, and by promoting learning and knowledge as responsibilities shared by all stakeholders.

The CLS has three major objectives:

1. To brand USAID as a world-class learning organization by rationalizing and harmonizing the Agency's core, technical, and mandatory training.
2. To reduce gaps and foster performance improvements with training and development interventions designed to reach the widest possible audience, achieving intended results.
3. To establish foundational principles and incentives for encouraging innovation, leveraging resources, and promoting ownership at every stakeholder level.

CTD's Business Model

The business model consists of the Division's design and components that, together, deliver services according to its strategic direction. Its components are described below, after the Business Model graphic.

The current service delivery model relies on permanent staff, consultants, and institutional support contractors. Permanent staff are essentially dedicated to planning and implementing core training courses; overseeing contracted services; and providing some technical support to other organizational units. The Division's operations are funded primarily from the Agency's Operating Expenses (OE) account.

The new business model design calls for greater interaction with the Bureaus, Independent Offices, Regions, and Missions, and their training coordinators¹⁹; expanded responsibility for unifying and aligning learning strategies and approaches; more capability to deliver learning solutions using appropriate technologies and regional platforms; better collaboration with the CIO's Knowledge Management (KM) activity; increased capability to timely serve learning requirements imposed by special and surge initiatives; and, increased, systematic corporate-level scrutiny and governance of learning programs and systems. In addition, the Division's model must accommodate the learning needs of a significantly increased and more blended FSO, FSN, and CS workforce.

These demands implicate the current business model, creating a need to revamp the Division's design. The CLS presents a revised organizational approach to delivering services, consistent with its strategic direction. It calls for a Division with three branches, providing services in (1) planning, evaluation, and governance; (2) core supervisory, management and leadership strategies and program implementation; and, (3) technical assistance to, and support of, all Agency units responsible for learning and professional development.

Business Model's Relationship to the HCAAF

The CTD will promote the Agency's culture of continuous learning by directing and supporting professional development, knowledge acquisition and management, and shared learning activities, throughout USAID. It ensures strategic alignment with USAID's mission, goals, and actions through close collaboration with the Bureaus, Independent Offices, Regions, and Missions and their partners and stakeholders, and by acting as the central point of coordination for planning, designing, implementing and evaluating learning strategies, technologies, and competency-based solutions. It uses an array of tools and techniques, including instructor-led classes, web-based learning, performance support tools, social networking, or a blend of these approaches, to encourage and support learning objectives.

¹⁹ This includes others with different titles that perform the same function as training coordinators, i.e., professional development managers/specialists, training officers, etc.

The CTD contributes to the five standards for success in the Human Capital Assessment and Accountability Framework (HCAAF) -- strategic alignment, leadership/knowledge management, performance culture, relent management, and accountability. The two most critical for this Strategy are these HCAAF elements:

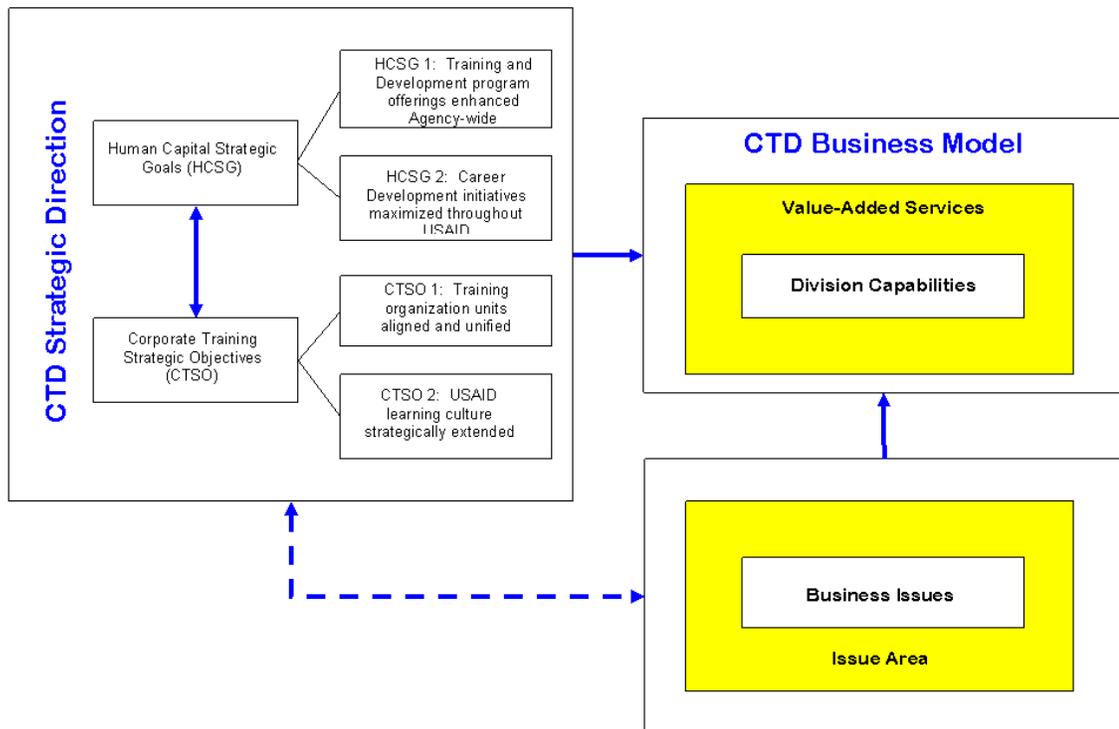
Strategic Alignment:

The CTD manages the Training Quality Assurance Council (TQAC), which is comprised of representatives from all units with training responsibilities. This ensures alignment with USAID's Human Capital Strategic Plan (HCSP) for FY 2009-2013. Also, the Corporate Learning strategy was developed in consultation with key Agency informants, is based on the HCSP and other Agency guidance, and becomes effective after approval by USAID's Administrator.

Leadership/Knowledge Management:

A continuous learning system is a key component of the HCAAF's Learning and Knowledge Management system. Creating and maintaining a culture of continuous learning is paramount to achieving success, and is a principal thesis of this CLS. The CLS objectives (described in the Appendices) are keyed to the definitions and standards of the HCAAF.²⁰

Corporate Training Division Business Model



²⁰ The Leadership/Knowledge Management system "focuses on identifying and addressing agency leadership competencies so that continuity of leadership is ensured, knowledge is shared across the organization, and an environment of continuous learning is present. HCAAF, Office of Personnel Management..

Strategic Direction

Strategic direction is the course of action that leads to the achievement of the goals of an organization's strategy. It is informed by a number of factors and variables, including the organization's mission and vision.

The Corporate Training Division's strategic direction is aligned with the Agency's, providing the expertise, tools, and related resources needed to establish and maintain a culture of continuous learning, so that all members of the workforce are equipped with the knowledge, skills, and attitudes necessary to perform effectively in their current jobs and future assignments. This is consistent with the Human Capital strategy of ensuring the right people are in the right jobs at the right time.

Strategically, the Division will embark upon a series of actions designed to facilitate better coordination, cooperation, and collaboration of USAID's workforce development activities worldwide. This will be accomplished, as noted in the Corporate Learning Strategic Objectives (CLSs), by providing leadership and technical support on learning and professional development options, and by robustly engaging every organizational unit to better define, implement, and evaluate learning strategies. Eliminating unnecessary duplication, promoting appropriate technologies, unifying technology platforms, and providing a central governance structure are key components of the CLSs.

Specific objectives are presented in two parts in this Strategy:

1. Corporate Learning Strategic Objectives (CLSs), which will produce a culture of continuous learning and unify learning strategies throughout the Agency; and,
2. Human Capital Strategic Goals and Results Framework, which were derived from formulations in USAID's Human Capital Strategic Plan for FY 2009-2013..

Both are to be pursued simultaneously, and if executed well, will support USAID's strategic goals.

Division Capabilities

USAID's business model includes the goal of reducing reliance on contractor assistance. To align with this part of the Agency's business model, the Division, which as noted earlier relies on consultants and contractors, must employ additional staff, with more diverse expertise. Their duties (and, those of current staff) will conform to the CTD's strategic direction, business design, and value-added model.

The CLS envisions the following components and capabilities in this new business model:

- a. permanent staff with expertise in instructional design and delivery, capable of providing options and direction to the Division's customers and other stakeholders;
- b. in-house technical capacity to identify learning needs, plan learning solutions, and meet surge and special initiative requirements;

- c. implementation of new or revised competencies, and their integration into the Agency's workforce planning, learning, professional development, and performance appraisal systems;
- d. rosters of Agency learning talent, individuals with defined areas of expertise drawn from current and former FSOs, FSNs²¹, and Civil Service specialists;
- e. program funding of staff for dedicated customer support services²²; and,
- f. administrative and logistic support consistent with the Division's responsibilities.

In 2009, the Division began reviewing and rationalizing its use of institutional contracts to determine services that might be in-sourced. This process will be performed annually, with findings and determinations reported to the BTEC. By the end of the CLS period, the CTD will have increased its internal capabilities to serve its customers, based on these annual assessments.

Business Issues and Issue Areas

In this Strategy's model, business issues are defined as problems or challenges (within the Agency or the Division) that are associated with one or more of the Division's capabilities (extant or proposed). As shown below, these can be aggregated under thematic headings ("issue area"). Corresponding to each issue area and issue is the Strategy's response ("capability").

Issue Area	Business Issue/Challenge	Capability
Policy	No Agency learning strategy	CLS; C-level support
	Ambiguous corporate culture	Continuous learning culture; C-level champion; TQAC
	Precepts/Skills Matrix unaligned	Competencies; TQAC
Planning	Lack of corporate direction and vision	CLS; TQAC

²¹ FSNs would be selected and pre-qualified members of USAID's Foreign Service Advisory Corp (FSN SAC). See, USAID Foreign Service National Senior Advisory Corps Concept Paper, adopted by the Business Transformation Executive Committee, August 2009.

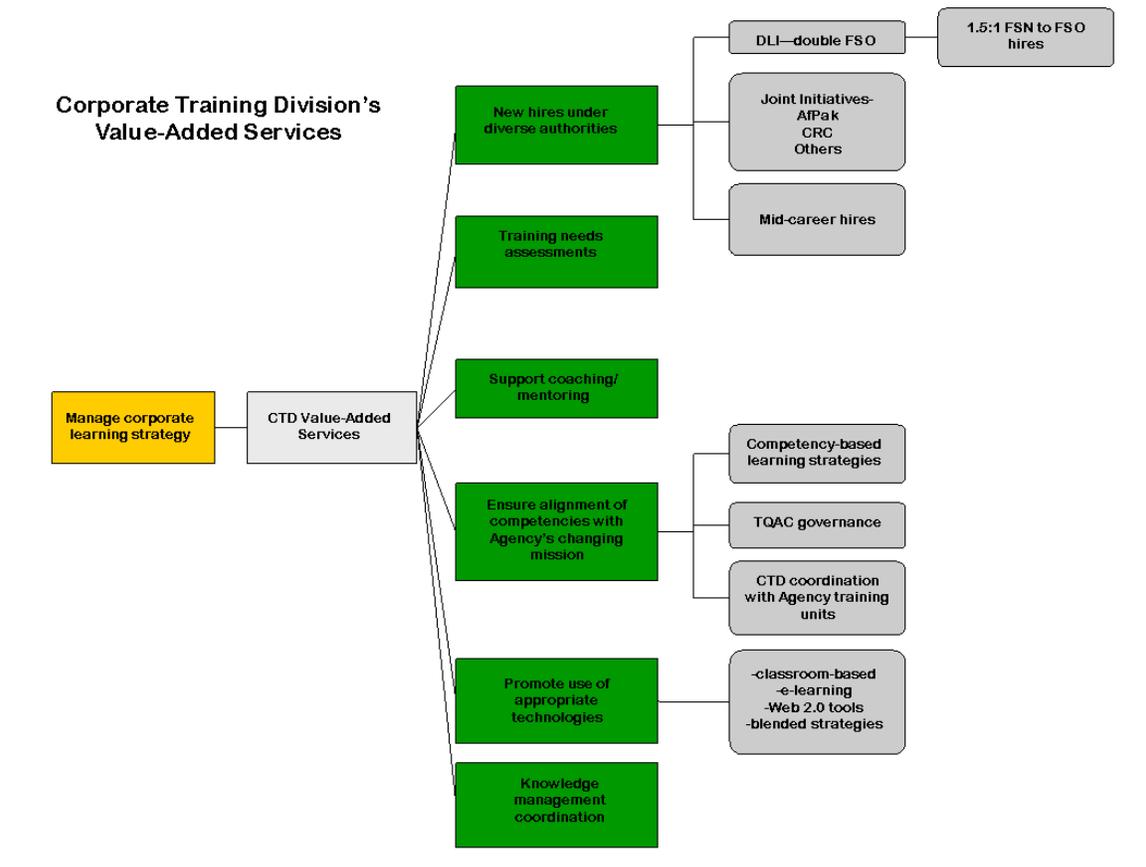
²² Currently, the Division fields two staff using this model to support learning requirements of the Afghanistan-Pakistan (AfPak) and Civilian Reconstruction Corps (CRC) initiatives. Allocating program funds for a dedicated CTD staffer fosters better alignment and coordination of an initiatives learning strategy and programming with those of the Division and, in turn, with all parts of the Agency. Given the importance, and the Agency-transforming effects of the Development Leadership Initiative, consideration should be given to transferring program funds to the Division for a fully, or partially, dedicated learning specialist or, alternatively, increasing the CTD's OE for the same purpose. This would produce several salutary results, particularly normalizing the approach to planning, scheduling, and implementing learning solutions at all stages of those hired through the DLI flexibility.

Issue Area	Business Issue/Challenge	Capability
Design	Inadequate information about learning needs and strategies	Agency-wide TNA; CTD-led intra-agency planning and coordination process; training inventory
	Little intra-agency communication	CTD implemented strategy; TQAC; BTEC
	Distributed authority for learning solutions without corporate guidance	CTD technical assistance; TQAC published guidance
	Diverse learning platforms	Platform & intra-agency decision model
	Grafted/surge initiatives	Second or dedicate a CTD specialist; optimize integration with Agency's learning system
Implementation	Linkage to knowledge capture and management	CTD promotes integration of KM
	Diverse implementing authorities	CTD & TQAC coordinate; unifying implementation guidance
	Certification programs	CTD & customer link technical and cross- competencies; BTEC sanctions
	Accessibility	CTD assistance on optimizing learner access; annual marketing plans; accessibility extension strategies
Evaluation/ Assessment	Exploring new media and technologies	CTD develops innovative learning solutions; CTD provides certain content delivery platforms
	No corporate level training needs data	Training Needs Assessment; Training Inventory; incorporate data obtained from intra-agency sources
Resourcing	Efficacy of learning solutions	Unified formats for reporting intervention satisfaction and subsequent performance impact
	Historically training not a high priority	C-level champion makes learning and development "mission critical" & promotes culture of learning; CTD input solicited when new initiatives planned; CTD re-branded to align

Issue Area	Business Issue/Challenge	Capability
	Training facility under-resourced	CTD procures and manages upgrades of facility infrastructure and equipment
	Control of learning delivery	CTD ownership of non-CIO distributed learning technologies/media platforms (includes region-based information/communication systems) to ensure access and cross-user compatibility; CTD coordinates with CIO/KM on use of, and space for Web 2.0 and other collaboration tools

Value Added Services

Based on the mandate to "manage the corporate learning strategy", this describes the major actions that must be executed well to fulfill the Corporate Training Division's mission.



New Hires

a. DLI

Among the Agency's most important new programs is the Development Leadership Initiative (DLI) which calls for doubling the size of the Foreign Service by 2012. Since its inception in 2008, there have been 277 new hires under the DLI recruitment program, and another 300 will be added in 2011. (Although current projections envision another 300 DLI officers being hired in 2012, the actual number will be governed by Congressional appropriations.)

In addition to the new DLI entrants, there will be a substantial increase in the number of Foreign Service Nationals (FSNs). The Agency's Workforce Planning Model predicates an average ratio of 1.5 Foreign Service Nationals hires (above attrition) for each DLI officer.

Approximately 60 new Civil Service employees will be added to USAID's workforce, to support this complement of DLI and FSN staff (as well as others hired under the "joint initiatives" and mid-career hires discussed below). The CTD will work with the Civil Service Branch/OHR to assess the needs of incoming CS hires, and devise appropriate learning packages and methods of delivery.

This CLS requires the CTD to expand its business model to include more active collaboration with the Foreign Service Branch of OHR, looking specifically at how to improve training, based on lessons learned adduced from surveys of DLI participants, and the bureaus, offices, and missions that support the DLI program. Also, the CTD will consult with the FSN hiring authorities to determine how best to address the learning needs of these new entrants. Greater use of mentors and coaches requires the CTD to increase its capacity to deliver training on mentoring and coaching techniques.

b. Joint Initiatives

USAID is responsible for training hires under initiatives with its Department of State and Department of Defense partners. This includes additions to the workforce under the Civilian Reserve Corps (CRC), the Provincial Reconstruction Team (PRT) and the Afghanistan-Pakistan (Af-Pak).

The current business model supports planning, designing and implementing learning strategies using direct hire training specialists employed by the CTD, using program funds. These training specialists work with their counterparts in State and Defense to define and develop appropriate learning packages, consistent with the mission and role of USAID. In addition, online and classroom learning is supported through a CTD contractor.

The CLS will continuously examine ways to provide value-added to these efforts through consultations with USAID's partners, and by using lessons learned to improve and expand learning strategies. The Division will devise instructional units on the Agency's role, mission, and programs under these interagency agreements for incorporation into

existing and future training programs²³, to help all staff understand and appreciate how their respective jobs and positions are aligned.

The CTD's new business model anticipates the Division being involved early in planning, designing and implementing other initiatives. This will be accomplished through various mechanisms, counting on the support of the corporate learning (i.e., "C-level") champion, who mandates the Division's input before authorization of any new initiative, and the role of the Training Quality Assurance Council (TQAC), that has Agency-wide responsibility for ensuring aligned allocation and use of learning resources.

c. Mid-Career Hires

USAID's workforce is being expanded with the recruitment and hire of staff at the mid-career level, particularly in hard-to-fill, and other mission-critical occupations. Although hired based on relatively higher levels of experience and competency over entry-level employees, nonetheless, mid-career staff will require learning support in areas like supervision and leadership -- thus, increasing the demands on the CTD.

To accommodate mid-career hires, as well as others who are promoted (from DLI and other initiatives), the CTD will roll out additional offerings of its supervision, management, and leadership programs, as well as design and implement new ones.²⁴

Conduct Training Needs Assessments

Assessing Agency-wide training needs assessments (TNA) is a corporate function, and is another CTD value-added service. The CTD's launch of a TNA in 2009 will accomplish several mission-critical objectives, including:

- giving USAID employees the opportunity to identify learning needs²⁵, preferred approaches and styles of learning²⁶;
- defining training needs from the standpoint of learners and their supervisors;
- providing the CTD, the TQAC, and other Agency stakeholders, with data that will help shape training beginning in 2010; and,
- establishing a baseline to evaluate learning strategies

The new business model requires conducting similar corporate-level needs assessments no less than every two years.

²³ This may include web-based discussion groups, electronic newsletters, and other informal learning and communication tools.

²⁴ See discussion of leadership programs.

²⁵ As indicated in the 2007 Administrator's survey, less than 50% of respondents indicated that their training needs are assessed. Although this metric is subject to debate, given the fact that no Agency-wide TNA had been conducted for more than a decade, the current TNA is expected to significantly increase positive responses.

²⁶ This includes learning delivery systems, which is important given the fact that there are 4 generations in the Agency's workforce and provision must be made to align learning strategies with the way each best acquires and utilizes information.

Supporting Coaches and Mentors

The CTD provides training and related support to coaches and mentors in a number of ways. There are e-learning courses available through the USAID University for both coaches/mentors and for those being coached/mentored. The Division's webpage includes links to various external resources on coaching and mentoring under the site, "Mentoring Matters". A CTD staff member coordinates the USAID side of the Civil Service Mentoring Program, administered by the Department of State, as well as the mentoring option made available to graduates of the USAID's Senior Executive Seminar (SES), conducted by the Federal Executive Institute (FEI).

Under the new business model, the CTD will work in tandem with other Agency units to expand mentoring/coaching activities, both formally and informally. For the DLI program, the Division will provide coaches with briefings on core courses and its recommended progression and timing for FSOs to benefit from these offerings. DLI coaches will participate in no less than a two day overview of Community of Practice (CoP) "best practices" training conducted by the Division. CTD and CIO/KM will monitor the needs of these coaches and resolve access issues.

Alignment of Competencies with Agency's Mission

a. Competency-based learning strategies

The Division will complete its definition of occupation/backstop specific competencies by 2011, developing its models in consultation with cognizant units of the Agency. As competencies are mapped, learning strategies will be reviewed and updated by those with associated training responsibility. The CTD will provide technical assistance, as jointly determined between it and the affected Agency training unit, and will revise training announcements, marketing efforts, and USAID University catalog entries. Also, in consultation with other Agency stakeholder, procedures and schedules will be devised for validating these competencies (as well as cross-cutting competencies).

b. TQAC Governance

This value-added service component of the CTD's business model contemplates an expanded role for the TQAC, as evidenced by the TQAC charter published in 2009. For example, the TQAC will perform an inventory of all learning programs and strategies, to fix the efforts being expended by each unit within USAID. This will help define possible areas of duplication, potential points for consolidation, and identify instructional units that may be amenable to more efficient and effective methods of delivery to, or access by, learners. TQAC's operations will be facilitated and managed by the CTD.

c. CTD Coordinates with Agency Training Units

As the corporate division responsible for guiding, delivering, and supporting the Agency's learning activities, it will devote more resources to consulting and collaborating with all USAID's units responsible for learning activities. The new business model envisions a range of strategies, ranging from regular meetings and communications with training coordinators, professional development advisors, country/regional training

officers, and others involved in designing and implementing learning, to identifying and promulgating best practices, promoting intra-agency use of subject matter experts (including members of the Senior Foreign Service Nationals Corps), and fostering greater intra-Agency cooperation to extend learning to primary and secondary²⁷ learner cohorts.

Using Appropriate Technologies

The CTD is the central authority on the applicability and utility of learning tools and technologies. It "owns" the Agency's University, with its online offerings of more than 2000 courses (under a license for 7,000 seats), and contracts with the major purveyors of core and program-specific learning packages. Its staff and contracted resources possess expertise in adult learning principles, and in instructional design, delivery, and evaluation. To inform the Agency's units responsible for training, the Division commissioned a report on alternative learning strategies, which outlines a plethora of "non-traditional" and technology-based methodologies.

The pillar bureaus have adopted technology-based learning strategies to varying degrees. However, for the most part, these efforts were undertaken and implemented for their own customers -- without consultation or coordination with the CTD or other agency organizational units. Until this Strategy, there was no Agency guidance on the acquisition and use of instructional technology and platforms.

Under the Division's new business model, its value added service includes developing guidelines and providing technical assistance on the use of technologies to its intra-agency partners. The Division has already introduced the use of mobile devices to deliver some content. Its lessons learned will be shared with other organizational units with training responsibility, and technical assistance will be provided to help them design current and future content for delivery via handhelds. In addition, the CLS expands the accessibility of learning by introducing approaches based on Web 2.0 platforms and tools. These include, as discussed below and elsewhere, the use of wikis, social networking, and collaboration software. The Division also contemplates working with Regional platforms on technology-based learning and communication solutions.

Knowledge Management Coordination

Learning and knowledge management (KM) strategies and systems -- although organizationally ensconced in different Agency offices (OHR and CIO) -- are intrinsically linked to USAID's interest, and ultimately its success, in creating and maintaining a culture of continuous learning. Currently, the CTD funds the head of the Agency's Learning Resource Center (LRC), and one of its staff acts as the Division's representative on KM-directed workgroups.

²⁷ A "secondary" group of learners is defined as those workforce members who would benefit from acquiring information that was principally constructed for users supported by the designing unit. For example, instruction on engaging the private sector originally designed for new Alliance Officers may be appropriate and valuable for Agriculture Officers. By facilitating cooperation between and among bureaus, independent offices, missions, and regions, the CTD promotes shared learning and more efficient use of resources.

It is critical that there be seamless integration of knowledge management and learning activities. This new business model encourages the CTD to more actively engage the KM unit, exploring ways to have the lessons learned and other data acquired by the latter be appropriately incorporated into the former's learning packages. Similarly, the learning needs, content, performance feedback, and other information developed by the CTD needs to be shared with KM. The CLS addresses this value-added service by requiring the Division to collaborate with KM on information-sharing, innovation-designing, and customer-support processes. This will be accomplished by negotiating a memorandum of understanding that defines the relationship between the units, as well as governing policies, mechanisms, and outcomes.

Summary

An effective CLS is one that aligns learning strategies with the needs of the enterprise and its human resources. Just as there is no one model for every type of organized human enterprise, there is no single prescriptive paradigm for devising and maintaining successful training and development schemes. Nonetheless, there are a number of elements that are found in every successful enterprise-wide learning system, including:

- high-level enterprise ownership and commitment;
- enterprise-wide owned governance structure;
- organizational philosophy and structures that emphasize and reward life-long learning;
- data-driven decision-making and accountability; and,
- adequate resourcing

With these elements in place, at the end of this Strategy period, USAID's culture of continuous learning will be in place, as will the policies, programs, and systems to:

- align workforce development objectives with those of the Agency;
- improve performance and expand “bench strength”;
- anticipate and close competency gaps;
- support strategic and tactical changes; and, .
- monitor performance and tactics, and make adjustments as appropriate.

These outcomes will be achieved, assuming the investments called for are made and there is ongoing, visible C-level support of the value of continuous learning.

APPENDIX 1

Corporate Training Strategic Objectives with Targets 2009 – 2013

1. Corporate Training Strategic Objectives

CLSO 1: Training organization units aligned and unified

I.R.1: All training designs are based on competencies and priorities authorized by the TQAC.

Currently, each USAID organization unit develops its training plan and programs based on its respective mission and objectives, without coordination or collaboration with others. By FY 2011, competencies will have been mapped for both Foreign Service and Civil Service employees. The mapping process is being collaboratively done between each Bureau and Independent Office and the OHR/TE. A similar process is being used for Civil Service employees.

1.1 Once the competencies have been mapped, they will be vetted by the TQAC. This represents corporate sanction of their alignment with Agency objectives and priorities. Beginning in FY 2012, training coordinators representing each segment of USAID's workforce will be required to submit an annual training plan for the subsequent year to the TQAC, along with any resource requests needed to execute this plan. OHR/TE will work with the respective organization training units to determine the best way to provide training services, including advice on instructional design, development, and delivery.

1.2 An annual Agency-wide training catalog, with schedules and a list of competencies to be learned will be published online by OHR in conjunction with TQAC.

Targets:

1.1 FY 2012 Annual training plans produced by training coordinators for the TQAC

1.2 FY 2013 Agency-wide training catalog launched

I.R. 2 Career development tracks designed for Mission Directors, Technical Officers, and Civil Service employees.

Several B/IOs are developing career ladders that include certification points. Career maps will provide employees with guidance about how promotion eligibility will be judged. They will also include the minimum amount of time that must be served in a grade or position, as well as the competencies (including knowledge, skills and abilities) that must be mastered.

Certification provides tangible evidence that a person has achieved mastery of certain skills sets and competencies, as defined and determined by the conferring B/IO. Some

career ladders will include points of certification. Because certification implies Agency recognition, such programs must be approved by the TQAC.

2.1 A policy decision must be made about certification for Foreign Service Nationals and career development tracks. Currently, some missions provide career development tracks for FSNs. However, such career maps’ applicability is localized to the sponsoring mission. A task force, comprised of representatives from the Foreign Service Nationals Advisory Council, the Foreign Service Program, the B/Ios, and OHR/TE, should be formed to explore the feasibility of designing and implementing Agency-wide guidance for FSN career ladders and certification.

2.2 Career development maps will be established for all FS, SFS, and GS employees. These career development maps will include mandatory and recommended training and other recognized types of experiences and exposure related to grades and positions such as successful completion of authorized stretch assignments, mentoring, and rotations. Such non-training experiences will be particularly important to demonstrate leadership competencies. All training and non-training aspects of each career ladder will align with the Agency’s precepts and skills matrix, as appropriate.

Targets:

2.1 FY 2010: Task force formed to explore and make recommendations on career tracks and certification for FSNs.

FY 2011: Recommendations made to TQAC and BTEC for career tracks and certification programs for FSNs.

2.2 FY 2009: Research undertaken on career tracks for Mission Directors. Separate project begun to identify career paths to the SFS by technical officers wishing to remain within their technical areas.

FY 2010: Reports submitted for BTEC approval.

I.R. 3 Leadership Training Suite expanded.

2.1 OHR/TE has been providing leadership training since 1999 through the Office of Personnel’s Federal Executive Institute (FEI).

Leadership Training Participants FY 2006 – FY 2011

Fiscal Year	Emerging Leader Program	Leadership Program	Senior Executive Seminar
FY-06	139	69	0
FY-07	141	32	27
FY-08	159	62	20
FY-09 planned	190	59	18
FY-10 projected	190	60	20
FY-11 projected	220	90	20

With the doubling of the Foreign Service and the planned expansion of the number of field offices, more leadership training will be required. Currently, leadership training is highly recommended, but not mandatory, nor is there mandatory Mission Director training. USAID should follow the example of the State Department and make leadership training a requirement at the upper levels of management, and promotions contingent upon completing such training. This will ensure greater transparency and foster a greater sense of shared experience, values, and purpose.

Even if such a policy is not adopted, there is adequate justification for expanding the leadership training suite. The principal drivers for this expansion include:

- Increased hiring – additional FS, CS, and FSN workforce entrants compel more training, particularly in the area of leadership competencies and techniques;
- DLI hires moving into leadership positions – the first group of DLI FSOs will be ready to assume leadership positions in FY 2011;
- More opportunities – there is a need to expose FSNs grade 9/10 and GS grades 11/12 to leadership competencies and an expanded suite allows more access to training for all employment categories;
- Availability of regional training platforms – offers additional facilities and resources for training, providing training opportunities for a wider audience, and reducing travel cost;
- Supports continuous learning – allows leadership training to be offered earlier and more often in the careers of staff; and,
- Feedback from evaluations – FEI participants consistently stated the need for more training opportunities to develop and maintain leadership competencies.

New leadership courses may include a Resilience Course, a Foundations Course, Intermediate Leadership Skills, and a Great Leaders series.

3.2 OHR/TE and the B/Ios will work closely together to identify ways of collaborating that lead to the inclusion of more leadership and leadership-related courses in B/IO-sponsored training. For example: the Global Health Bureau has indicated an interest in developing health-specific leadership courses. A collaboration between OHR/TE and GHA will be attempted and similar working relationships will be explored with other B/Ios.

Targets:

- 2.2 FY 2010:** Develop and pilot intermediate course, *Resilience*
- FY 2010:** Develop and pilot *Foundations* course

FY 2010: Develop and pilot *Great Leaders*
FY 2010: Develop and pilot *Team Commitment*
FY 2011: Implement expanded Leadership Training Suite

- 3.2 FY 2010:** TE and Global Health jointly plan training modules that address health-specific leadership competencies.
FY 2011: Leadership training modules developed by TE with other technical offices.

I.R. 4: Greater collaboration achieved between OHR/TE and C/IO Knowledge Management (KM)

KM's principal role within USAID is to capture institutional knowledge and memory, using a host of tools and techniques. The relationship between KM and OHR/TE will continue to be expanded. Information maintained by KM will be regularly assessed for use in training, to further exploit lessons learned, best practices, and after-action reports.

4.1 TE will work with KM to establish a USAID Training Community of Practice (COP). The COP will be open to all concerned with training (i.e., training coordinators, trainers, managers, and policy makers). This will be co-managed by KM, which has designed a web-based space for COPs and provides a suite of on-line collaboration tools.

Targets:

- 4.1 FY 2009:** Enhance and Expand current KM working groups.
FY 2010: Establish USAID Training Community of Practice

I.R. 5: Training provided on organizational and inter-Agency programs, standards and processes

USAID is working closely with the Departments of State and Defense, but unless an employee is directly engaged in an inter-Agency activity (e.g., PRT or CRC), there is little understanding about how these relationships impact the mission of USAID and the employee's job. Similarly, unless one has been exposed to the tools, techniques, and practices of development, there is no real context for the job one performs. To ensure the Agency's workforce has a shared vision of USAID's mission, purpose, objectives, and approaches, it is essential that there be mechanisms to provide all members of the workforce with adequate information.

OHR/TE will work with OHR/FSP and OHR/CSP to identify ways of introducing organizational relationships, standards and processes, and to develop training modules that cover USAID's role and working arrangements with other USG and key non-USG partners. These training modules will be used in future orientations, and will be the subject of one or more online courses for current employees.

Targets:

2.3 FY 2009: FSP/CSP led working group established to identify information that should be shared knowledge throughout USAID.

FY 2010: FSP/CSP delivered training modules developed and units of instruction produced and integrated.

CLSO 2: USAID learning culture strategically extended

I.R. 1 Strategic plans produced by Agency training units to market training and learning opportunities.

Currently, training opportunities are publicized in a number of ways, including announcements directly from the sources of training to eligible populations; by publication in the Agency's General Notice; and, by listing in the USAID University catalog. There is some question about the efficacy of these approaches, particularly when it comes to staff exploring and selecting options for their Individual Development Plans (IDPs). It may be the case that the information exists and has been publicized, but staff (particularly overseas) may need to be directly marketed to make them aware of opportunities, and how these relate to their work and development.

2.4 OHR/TE, the B/Ios, and representatives of the FS, GS, and FSN communities need to:

- a. Examine their current practices and methods for creating awareness of opportunities throughout the Agency, and develop strategies for improvement.
- b. Survey training units to determine their current awareness programs and level of success with each.
- c. Use this information to design a training event (announcement) template for print and electronic media.

1.2 Alternative channels of information dissemination will be documented. This may include, for example, working through key groups¹, like the FSN working group, country coordinators, the front office, and at Mission Director Conferences. The TQAC will take the lead on producing guidance for the use of key group platforms.

1.3 Annual training plans submitted by each organization training unit will include a plan for marketing, based on a collaboratively designed template. OHR/TE will consolidate these annual plans and schedules and catalogue them in the Agency's LMS.

Targets:

1.1 FY 2010: Current marketing of learning opportunities surveyed and documented.

¹ This recommendation comes from the Global Health Bureau's recent Professional Development Needs Assessment. See page 8.

FY 2010: Training event template designed for print and electronic media.

1.2 FY 2010: Guidance on disseminating learning opportunities through key groups is published by the TQAC.

1.3 FY 2011: Template designed for marketing training in annual training plans.

FY 2012: Information dissemination and marketing strategies produced.

FY 2013: Annual training plans, with competencies, incorporated in LMS.

I.R. 2: Better liaison with overseas training units established

Regional Training Centers (RTCs) will play an important role in the USAID system. In addition to being responsible for supporting the Missions (and other operations) in their respective portfolios, the RTCs (and other regional platforms) offer an appropriate forum for coordinating training and other development opportunities. Although staffing will vary, RTCs will be an appropriate venue for supporting DLI (and other staff) training, as well as to meet “surge” requirements. To ensure appropriate coordination throughout the Agency, the CTD must be intimately involved in planning, coordinating, and oversight activities. Ideally, the CTD would assign a senior level FSO as its liaison with each RTC.

2.1 Regularly scheduled video-teleconferencing between OHR/TE and regional training staff will promote joint planning and coordination of training. These sessions would include OHR/TE technical assistance on training designs and delivery systems, as well as developing and implementing future training needs assessments. If OHR/TE is given an additional FTE, then OHR/TE could serve as the central point of coordination. With its database of information about efforts in all the regions, it can act as a vital link for sharing training best practices. The additional OHR/TE staffer could be a liaison with overseas missions. Another approach to increasing collaboration may be the establishment of a COP or Community of Interest

Targets:

2.5 FY 2010: Working group established to explore and recommend regularized system for coordinating training plans and resources between and among OHR/TE and regional platforms. Quarterly video-conferences begun

Additional FTE approved Position Description developed and graded. Recruitment and hiring by 2nd QTR of 2010

APPENDIX 2

Human Capital Strategic Objectives with Targets 2009 - 2013

Human Capital Strategic Goals

The current USAID Human Capital Strategic Plan (HCSP) FY 2008-2013 outlines the Agency's principal strategic objectives in human resources-related areas.¹ Although training has a role to play in all five HCSP objectives, its primacy as an Agency tool is established in SO 4, "*Ensure employee high performance through continual development and performance management*". A number of important actions are described under this SO, including:

The training and development program offerings will be enhanced. Employee development programs will be offered that close competency gaps and enhance performance. In addition, the Agency will utilize the capabilities of the Learning Management System. Career development initiatives will be increased. The Agency's career development officers were eliminated due to funding constraints. The Agency needs to reinstate that capacity.

Strategic Goal 1: Training and Development program offerings enhanced Agency-wide

Offer best in class, targeted employee development programs that close competency gaps and enhance performance.

- **Optimize use of alternative delivery modes:**

Current training will be re-examined to determine if technological solutions might make offerings more widely available, without sacrificing quality. Distance learning may often prove a viable alternative to classroom based instructor-led program delivery. OHR/TE will increase training and development effectiveness by leveraging the use of technology and different learning strategies.

USAID's workforce is multigenerational. This has profound human capital management implications. Each generation brings to the Agency its own set of shared social and cultural experiences and perspectives. Even the way they are used to acquiring information, sharing knowledge, and approaching challenges often differ. For example, DLIs, Junior Officers (JOs), and entry-level Civil Servants come from a decidedly more sophisticated technological era than that of Baby Boomers. Consequently, as studies have shown, these younger workforce members tend to be more experienced in the use of information and computer technologies to acquire knowledge and to communicate with others than their older counterparts. On the

¹ The five HCSP strategic objectives are: (1) strategically align staff with Agency priorities; (2) increase staff mobility and readiness to rapidly meet emerging priorities; (3) ensure a diverse workforce and culture of inclusiveness; (4) ensure employee high performance through continual development and performance management; and (5) provide first rate HR services and tools to support USAID's mission and increase efficiencies.

other hand, their counterparts received instruction through more traditional instructor-led classroom-based training models. Then, information/knowledge sharing was more limited and less fluid than it is today. Now, computer-based technologies and platforms provide anyone with a desktop, a laptop, or an appropriately outfitted mobile device, access to banks of data and links to countless other individuals and groups.

USAID's challenge is to design and deliver training and development opportunities aligned with the learning styles of all its customers. This means understanding that older workers may be intimidated by computer-based and other electronic delivery modalities. Making their learning experiences anxiety-free may require additional support, like help-desks, or other intermediation. On the other hand, younger workers tend to embrace computers and other electronic devices.

Through the USAID University, OHR/TE offers distance, blended and traditional classroom training. A substantial number of classroom training events are delivered in Washington, D.C. This includes new employee orientation courses, which ranges from three days for CS personnel to 5 weeks for FS staff. Technical training is provided by USAID's operating units, primarily using classroom instruction. Leadership, management, supervisory, and language instruction are also predominately classroom-bound, as well as most of the mandated training (like diversity and ethics).

Many of these classroom-based training courses might be more effectively delivered using a blended approach. This would entail parsing certain topics for delivery via computer, or on handheld devices (e.g., MP3s, iPods). Learners would be required to complete e-training course segments before or after classroom instruction (blended delivery model).

OHR/TE already provides an extensive catalog of distance learning (DL) courses, available to USAID workers through the LMS, USAID University. There are two categories of DL offerings -- courses that are USAID-specific and commercial off-the-shelf (COTS). The former provide instruction on core USAID competencies; the latter is offered for staff to engage in self-directed learning. Although these DL courses attract a good number of users (particularly the USAID specific subjects), participation rates in the commercial segments could be improved. As reported recently by two OHR/TE staffers who conducted interviews in three USAID field missions, customers felt somewhat intimidated approaching the online SkillSoft courses. OHR/TE intends to address these concerns after completing a Training Inventory.

OHR/TE will explore other technology-based methods for delivering training. These include synchronous and asynchronous e-learning approaches, deployed through webinars/webcasts, podcasts and DVC.

Finally, to aggressively exploit the ways communication technologies produce and facilitate learning and knowledge-sharing communities, OHR/TE will consult with the other divisions of OHR and with its customers in the B/IOs, about the use of social networks, wikis, blogs, cloud computing, and other Web 2.0 platforms and stratagems. Not all will prove viable because of the sensitive/privileged nature of much of USAID's communications. For example, at this point, USAID policy prohibits authorized users to access certain interactive social network sites from Agency computers.¹

Looking at “outside-the-box” ways of enlivening content, facilitating delivery using appropriate technologies, and tailoring learning opportunities to maximize participation are just some of the ways to achieve USAID's goal of offering *best-in-class*, targeted employee training and development services.

- **Training needs determined:**

Conduct an Agency-wide training needs assessment (TNA) to determine gaps that must be closed to achieve consistently high levels of performance. After contractor selection (FY 09/Q4), B/IOs will be canvassed for input at major phases of the TNA (instrument design; field work; and, analysis). Information resulting from the TNA will be used for planning, revising, and implementing training beginning in 2010.

- **Produce a Training Inventory (TI):**

In order to enhance training and development activities Agency-wide, a complete inventory will be conducted. The TQAC Secretariat will take the lead on contacting every USAID unit responsible for training, to inventory the training/learning opportunities provided. The inventory will include the purpose, course/activity description, topics, outcomes, and other important data. Of particular interest are “lessons learned” and “best practices”, as well as identifying shared learning objects (i.e., portions of a course that could be used in another course or perhaps by a different office. This Inventory will form the basis for scheduling training reviews – one of the mandates of the TQAC.²)

- **Develop Specialized Training:**

OHR/TE will respond to the need for specialized training in “soft skill” subjects like “partnering” and “interpersonal skills”, building upon the treatment of these topics in other courses. The TNA and TI will produce data needed to tailor each course. Like every new training program, these will employ appropriate pedagogy and options will be examined to “push” as much content to the learner’s desktop using distance learning or blended training.

¹ Over three hundred colleges, universities, and researchers conduct classes and research in the virtual world of Second Life (SL). This platform fosters collaboration in a high-quality cyber environment at relatively low cost. However, access to SL is restricted under Agency Policy ADS 545.3.5.10 (“Access to web content category “Games: Social Networking” is not allowed by Agency policy.”)

² The mandate is to review at least 1/3 of USAID’s training offerings annually.

Support continuance of Agency-wide LMS to increase learning and employee development capabilities.

- **Increase functionality:**

During FY 09, OHR/TE will increase LMS functionality in two main ways: (a) building out the competency management tool, and (b) rolling out the Expertise Locator module, part of the Talent Management suite.

- **Promote staff utilization of the LMS**

For the LMS to gain better traction within the Agency, it must be better known and understood outside of OHR. An aggressive communications and marketing program will be planned and implemented, touting the features of the LMS, its user-friendliness, and comparing it with similar training and talent management systems employed in award-winning private sector companies like The Caterpillar Corporation and Motorola. For baseline comparison purposes, the TNA will include survey items related to LMS usage, customer satisfaction, and other relevant factors.

Strategic Goal 2: Career development initiatives maximized throughout USAID.

Reinstate an in-house OHR Career Development staff that offers and coordinates, career counseling for all staff who desires it.

- **Complete career tracks for all employees**

The Department of State provides extensive career development support for its Foreign Service and Civil Service personnel. Individuals interested in joining the Department are encouraged to review its website, where career options and tracks are described. Its Foreign Service Institute (FSI) clusters training in a similar format. In 2007, State further articulated career paths by making a number of courses mandatory. All of this is supported by robust career counseling.

USAID's Human Capital Strategic Plan FY 2009-FY 2013 provides for the reinstatement of an OHR-based career development service. To realize this goal, it is essential that competencies for every technical backstop area be stipulated, so that career ladders can be structured. This process is underway with contractor assistance. By FY 2011, competency models for each occupational area in the Foreign and Civil Service will have been defined.

As an interim strategy, OHR/TE is producing a career path map for Mission Directors, and a normative model for promotion to the Senior Foreign Service from other technical backstop disciplines. These paradigms will be validated after the competency models are produced.

- **Initiate electronic IDP function that allows all staff to set and monitor career goals.**

The electronic IDP (eIDP) function resides in the LMS under the management purview of the OHR/TE. Currently the LMS is capable of nesting the eIDPs prepared

by staff, in conjunction with their supervisors. However, -- without the competency models -- there are no uniform standards to consult when attempting to set career development goals. Nonetheless, eIDPs can be electronically generated by staff and supervisors, and stored for ready retrieval in the LMS. Thus, employees can input their eIDPs and monitor progress against the projected goals and activities contained therein.

Once the competency models have been rolled out and career tracks (see above) have been established, OHR/TE will provide written guidance on how to design, manage, and monitor competency-based eIDPs.

Configure, Pilot and Launch the 360/Multi-rater Feedback System for the FS Senior Management Group (SMG).

The 360/Multi Rater Feedback System was piloted in FY 2008, for the SMG selection and assignment process. Minor changes were recommended by OHR FS personnel staff and the system was fully launched for the FY 2009-2010 bidding cycle. This system will continuously be evaluated and monitored for enhancements as the Agency needs change.

Participation in formal and informal mentoring is increased.

Learning does not occur solely in classrooms or through electronic devices. The most powerful and durable approach to acquiring the knowledge and skills needed for high achievement in the workplace often is found in one-to-one knowledge transfer – through mentoring and coaching.

Although OHR/TE offers mentoring and coaching, and has publicized the availability of these services, the Division intends to market these career supports more aggressively. Already an evaluation report for the Civil Service mentoring program (a Department of State and USAID joint enterprise) has been produced, showing positive results. However, more can and will be done to promote mentoring and coaching (the latter offered to Foreign Service personnel). The following strategies will be pursued during the remainder of FY 09 and during FY 10 through FY 13.

Promote mentoring and coaching as important knowledge-sharing activities

Mentoring and coaching should be viewed as legitimate career development activities, rather than as stand-alone initiatives. These programs advance the Agency's strategic interests in harnessing and disseminating knowledge. OHR/TE will test its approach to mentoring and coaching programs and relationships, through evaluations and by experimenting with different mentoring/coaching arrangements. For example, although mentorships are usually considered a one-on-one activity, OHR/TE will examine clustered (where a mentor works with more than one individual) and networked (where

two or more mentoring programs collaborate on learning objects) mentorships as ways to encourage “group-based” soft skills such as leadership, teamwork, and management. Overall, the intent is to gain Agency-wide concurrence that mentoring/coaching is a valued, integral part of the Agency’s learning strategy.

- **Civil Service Initiative**

Promotional materials for CS mentoring have been prepared by USAID and the Department of State. The brochures and applications will be widely disseminated in accordance with an Agency-wide communications strategy designed to encourage participation by mentors and mentees. This communications strategy will be produced after consulting with each B/IO, and with the Union. The intent is to obtain input from each of these stakeholders and to elicit their support as partners in creating awareness and enrolling participants. The communications strategy will include appropriate incentives and awards (i.e., certificate of appreciation or something similar). To underscore the value USAID ascribes to mentoring, successful completion of a mentoring activity will be registered in the Agency's LMS and will be duly noted in the Annual Evaluation Reports of participants. If authorized by the Agency (with Union concurrence), the Civil Service appraisal system will be modified to include metrics for successful participation.

- **Foreign Service Initiative**

Mentoring of FS personnel occurs early in their careers. OHR/TE, after consulting with the B/IO, will devise a promotional program aimed at broadening the pool of mentors, generating a cadre of experienced individuals with highly specialized skills or unique experience profiles. Such a cadre might include experienced Foreign Service Officers who have completed non-traditional assignments at, for example, the National War College or with an office of the United Nations. Unlike traditional mentors who work one-on-one with mentees, these specialists would work with two or more Foreign Service staffers interested in acquiring information not readily available in a training program. Mentors would agree to convene seminars, workshops, webcasts, or engage in other knowledge sharing activities for their groups, during the course of the relationship.

Coaching -- not mentoring -- is the norm for Foreign Service officers as they progress in their careers. OHR/TE will continue to provide and promote "situational" coaching -- a less formal way of individualizing knowledge, skills, and insight transfers for Foreign Service personnel.

Incentives and rewards are extended for participation in mentoring and coaching programs.

As noted above, OHR/TE will promote mentoring and coaching as valued elements of successful career growth and development. This will require re-defining incentives and

rewards for participation. Incentive and reward packages will be developed by FY 2012, based on consultations with Agency stakeholders and feedback obtained from evaluations.