

Electronic Document Submission Title Page

Contract No.: 278-C-00-02-00210-00

Contractor Name: Chemonics International, Inc.

USAID Cognizant Technical Office: Office of Economic Opportunities
USAID Jordan

Date of Product/Report: June 2005

Document Title: Jordan National Customs: Human Capital
Development and Management – Phase 3

FINAL

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Activity Title and Number: Achievement of Market-Friendly Initiatives and
Results Program (AMIR 2.0 Program)

PSPI Component, "HR Change Planning," Task No.
555.01

Name and Version of Application
Software Used to Create the File: *MS Word 2002*

Format of Graphic and/or Image File: *N/A*

Other Information: *WinZip Windows*



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Human Capital Development
and Management – Phase 3**

Final Report
June 2005

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

Data Page

Name of Component: Private Sector Policy Initiative

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Practice Area: Trade and Investment

Service Offering: N/A

List of Key Words
Contained in Report: Systems Approach to Training (SAT), Human Resources (HR), Human Resource Management (HRM), Human Capital Development and Management (HCDM), Competencies, Training Center (TC), Skill Sets, On the job training (OJT)

Abstract

Chemonics and Jordan Customs Department (JCD) selected Black Iris/Estarta as the successful vendor to implement the Human Capital Development and Management (HCDM) system including the integration of the Systems Approach Training (SAT). This report details the consultation process between JCD, the AMIR Program, and Black Iris to customize the generic human resource (HR) system, MenaITech, and the design of a SharePoint Portal to accommodate the SAT.

In addition, the report details the considerable preparation by the JCD Training Center (TC) to reshape the way to manage the design, delivery, and evaluation of training. This includes the adoption of On the Job Training (OJT) as a formal and valid training solution with the development of a corresponding TC and workplace training model.

Both of the above activities prepare the way for a pilot of the new HCDM system and expand the link between jobs and training activity.

Abbreviations and Acronyms

HCDM	Human Capital Development and Management
HR	Human Resources
HRM	Human Resource Management
JCD	Jordan Customs Department
OJT	On the Job Training
SAT	Systems Approach to Training
SME	Subject Matter Expert
MOU	Memorandum of Understanding
TC	Training Center

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Executive Summary

Phase 3 of the Human Capital Development and Management (HCDM) project concentrated on working with the Jordan Customs Department (JCD) Human Resource (HR) and Training Center (TC) staff and Black Iris, the system vendor contracted to refine the business requirements for the new HR and training system including the integration of the systems approach to training (SAT). This fact-finding exercise was an extremely time-consuming process that dominated Phase 3.

The other key component of Phase 3 related to the introduction and acceptance of an On the Job Training (OJT) proposal for the TC. The proposal will take time and resources to implement but the Director General and the TC Manager agreed on the suitability of OJT methodology for JCD.

Key outcomes from Phase 3 of this consultancy are:

- Completion of the Black Iris/JCD/AMIR consultation for HR system modifications and SharePoint™ portal design.
- Acceptance by the Director General and the Knowledge Management Committee (KMC) of the TC's OJT Proposal.
- Engagement of the new TC Manager with the HCDM project and OJT in particular.
- Development of an OJT Workplan for TC.
- An assessment of the readiness for change of HCDM key business players.

The implementation of a new system is now becoming a reality for JCD staff in the HR Directorate and at the TC. With this realization, come increased activity and some increase in anxiety. However, constant contact between the two workgroups and AMIR consultants is helping to reassure and encourage.

In addition, project managers from the key business owners are at last showing signs of understanding key concepts related to the underlying HR and training reforms introduced in Phases 1 and 2. The disappointing aspect of Phase 3 has been the lack of time available to continue the HR and training reform program due to the intense program of system consultations through each week of this consultancy.

The recommendations from Phase 3 activity follow:

- **JCD Project Managers and AMIR consultants and Project Manager carefully review Black Iris' written response to the fact-finding consultations.** It is critical that the Black Iris' response demonstrates a clear understanding of the practicalities and intent of SAT and that the integration of the SAT process with the HR system is seamless and provides a user-friendly solution. It is essential that all AMIR and JCD key players agree on this before Black Iris move forward to the design phase of their project plan.
- **AMIR facilitates a change management workshop for HR and TC staff to assist with the preparation to undertake training and operation of a new system. Consultant should deliver the workshop prior to the commencement of new system training.** The identification of some change averse behaviors in a

few key players suggests that intervention of this nature is critical to help some people ‘let go of the known’ so that they can embrace what the change has to offer them and JCD.

- **AMIR facilitates the implementation of the OJT workplan.** The TC Manager has sought AMIR Program assistance in implementing this workplan. It is an area of reform that does not impinge on HCDM Project Managers’ time and therefore is able to progress independently and in tandem with system activity.
- **JCD Project Managers and AMIR prepare criteria for involvement in pilot testing that includes a coverage of:**
 - **job types**
 - **system power users**
 - **system power users ‘back ups’**
 - **train the trainers**
 - **generic JCD staff within the pilot sites.**

This group will be required to test the system functionality, user friendliness, workflow, data input, management, reporting, and employee viewing access through the encyclopedia.

The pilot needs to maximize the short time available to test the systems capabilities from many points of view. It is critical that JCD makes sound business decisions about the sustainability and maintenance of this new system. The new knowledge and skill must be shared and a few key players within the business owners directorates not hold tightly to institutional owned knowledge. JCD needs to make these decisions and commitments prior to the commencement of system training and the system appearing on JCD desktops. Decisions made at this time will set the scene for future system ‘ownership’ and usage.

- **Continue HR reforms through the extension of job competencies into a JCD competency framework.**

This work began with the identification of competencies in the job descriptions. JCD needs to establish competency standards for common competencies and the compilation of a common and technical competency framework will provide a visible alignment of competencies with JCD jobs. AMIR will need to be alert to seizing the opportunity to progress the HR reforms. This can only occur when there is a break in the pressure on HR personnel from the current HCDM system demands.

The above recommendations provide key workplan priorities for the HCDM project for the next few months.

1. Background

The Human Capital Development and Management (HCDM) Project evolved from some earlier USAID-funded AMIR work undertaken by a number of different consultants early in 2004. ‘Human Resource Development – Phase 1’, prepared by John Howard and Walter Hekala, and ‘Systems Approach to Training’, prepared by Gaétan Turgeon, are the most significant of these studies. The aim of this project is to introduce a series of HR and training reforms supported by an integrated HR/training system.

Work in Phase 1 (October 2004) and 2 (February 2005) of this project included:

- Assessing existing HR and training skill sets and business processes.
- Gaining JCD acceptance of the business requirements of the Request for Proposal (RFP) for an integrated HR and training system.
- Developing a business implementation plan.
- Developing key executive and operational level relationships required to sustain the project.
- Extending the Knowledge Management Committee’s mandate to include overseeing the HCDM project.
- Assessing the qualifying vendor and preparation for AMIR, JCD, and vendor collaboration for customizing the new system.
- Establishing validating committees for job descriptions and training material.
- Developing HR and training center staff competencies in preparation for working with the introduced reforms and the new system.
- Increasing interest in the HCDM project within the Ministry of Finance and the World Customs Organization.
- Identifying skill deficits and planning for skill development for JCD Directors.

Much of the work undertaken in Phase 1 and 2 concentrated on instilling key concepts such as the link between job descriptions and training as well as the need to link training to business needs. Training concepts introduced during Phase 1 included the Systems Approach to Training (SAT) process – analysis, design, development, implementation, and evaluation.

The local HR consultant and the HR and Training Center people completed the documentation of JCD jobs and continued the process of formatting existing training courses into a common format consistent with SAT in the period between Phase 2 and 3.

The context for Phase 3 work is summarized as:

- Facilitated the understanding of some of the key HR and training concepts and processes at both the executive level within the Knowledge Management Committee and at the operational level in corporate areas (HR, Planning, IT, and training).
- Confirmed that the software vendor selected for the project has an understanding of both the technical and business requirements as stated in the RFP.

2. Consultancy

This report is prepared in accordance with the scope of work agreed under activity number 555.01 HR Change Planning. Phase 3 of this project covers the period 22 May to 22 June 2005. The title of this project is Human Capital Development and Management. The objective of Phase 3 of this consultancy is to continue preparation for the HCDM system pilot through a formal consultation process with the system vendor to refine RFP system requirements, agree on a platform of system modifications, and design specifications. In addition, the HR and training reform process is to continue as defined in the HCDM workplan.

The Phase 3 methodology related to project sustainability included:

- Task reviews.
- Short and medium term planning.
- Building internal competencies and confidence.
- Supporting JCD staff in a formal negotiation and consultation process.
- Building relationships and broadening the base of support within JCD.

Priority phase 3 tasks included:

- Holding a series of consultation meetings among Black Iris, JCD, and AMIR regarding system scope, modifications, and design.
- Preparing TC for the formal adoption of OJT as a valid training methodology for JCD.
- Embarking on the first steps towards a competency framework.
- Assessing readiness for change by key players in HR Directorate and TC.

The context for this phase, namely the arrival of a new Director General and the lengthy nature of the system consultations left no opportunity to embark on the early stages of developing a competency framework. This resulted in the rescheduling of the early framework activities.

This report documents the work of the three authors. The term ‘consultants’ is regularly used in the report to reflect the work of the consultant team in Phase 3. A list of consultations for Phase 3 is at Annex 6.

3. Leadership in Jordan Customs Department

A number of important leadership issues emerged during Phase 3. The leadership context for a project of this type is important and as such provides a background to the activities detailed in this report.

3.1 Director General

On June 5, 2005 the Council of Ministers announced a new Director General of JCD, which marked progress as part way through Phase 3. His Excellency Eng. Alaa Batayneh commenced work as the Director General of JCD and sought a briefing from USAID and the AMIR Program shortly after commencing in his new post. The agenda for this meeting included the HCDM along with other AMIR/JCD projects. This appointment comes at a time when the AMIR Program and the JCD are negotiating a modified MOU to continue the HCDM until the close of the AMIR Program next year. JCD Directors and the TC Manager have all briefed the new Director General on their areas of responsibility. The head of the TC and the HR Directorate included the HCDM as an important component of their current work priorities.

This transfer of leadership to a new Director General half way through this project is important and while it is too early at the time of writing to predict what influence this may have on the direction of the project, it is noted here as a potential important project milestone. Early indications suggest training is an important priority for him and his support to resource and highlight AMIR Program activities is certainly encouraging.

3.2 Manager, JCD Training Center

During Phase 2, the leadership of the TC was in a state of flux with a new manager announced but unable to take up his position due to ill health. This situation left the previous manager in a caretaker role, which was unsettling for staff working at the Center as the period of uncertainty increased.

The new TC Manager has now taken up his position and is establishing his leadership within the TC. The new TC Manager has a consultative approach with his training team and. He is positively engaging with the HCDM project and what it offers JCD and the TC. During the next six months, his leadership will be particularly important as the concept of OJT is introduced as a formalized training methodology coordinated from within the TC. Further, his leadership is a positive factor as SAT becomes a training reality for training designers and deliverers. The TC Manager's ownership of the OJT concept and his standing with his Director colleagues will be important in paving the way for this activity, which reinforces the link between jobs, and training.

3.3 Knowledge Management Committee

The Knowledge Management Committee (KMC) is the internal steering committee for this project. It provides the HCDM key business owners of IT, HR, Training, and Planning to meet with the Director General's nominated Chairperson and other Directors to oversee the project.

Unfortunately during Phase 3 of the project there developed a need to review the committees membership and by-laws, as some members became increasingly disappointed in the lack of due consultation during the committee decision making process. This led to a drop off in attendance by some key players and talk about whether the committee was a serious institutional endeavor.

However, the final KMC meeting during Phase 3 proved a forum for lively debate and consultative decision making with attendance from nearly all key players. The KMC agreed at this meeting that AMIR and JCD exchange draft ‘modus operandi’ documents before the next meeting to ensure the committee runs on professional lines. Further, that in the future the KMC will follow formal meeting procedures and consultative decision-making processes. The consultants have prepared a draft for discussion early in July.

This committee is critical as it provides the internal JCD leadership of the HCDM project. Its effectiveness will be important as the project continues and comes to a point where JCD independently manage this project. The facilitation of the committee is currently a JCD/AMIR joint responsibility. Any new erosion of credibility of the committee will need early and preventative action.

4. HCDM Workplan

The review of the workplan and the preparation of the roll out workplan were the two urgent tasks facing the consultants at the commencement of Phase 3.

4.1 Workplan Review

The most significant progress during the period between Phase 2 and the commencement of Phase 3 was the documentation of all JCD job descriptions. A committee consisting of HR personnel and Customs House Directors validated the operational job descriptions. These job descriptions are now awaiting the approval of the Director General.

The completion of the documentation of the 15 existing JCD training courses in the common format that will support the SAT process is the other area of significant progress. This involved considerable effort on behalf of the TC personnel who had to convince trainers of the need for this work to be done. In addition, the delivery of the PC Skills training occurred providing a much needed boost in competencies to the HR and TC people as they anticipate the arrival of a new HR and training system.

An item that slipped in the period between Phase 2 and 3 was the implementation of the Directors' Management Training Program. The analysis of the skill sets of the Director, documented in AMIR Program consultant John Howard's February 2005 report 'Critical Skills – Gap Analysis and Closing the Gap' established the urgent need to design and implement a Directors' Management Training Program. Further information on the resurrection of the Directors' Management Training Program is at 6.2 below.

The HCDM Workplan at the commencement of Phase 3 is at Annex 1.

4.2 Extension of HCDM Workplan

The MOU under which this project operates is due to expire in July this year. The proposal to extend the MOU required an equivalent extension to the HCDM workplan, which AMIR presented to the Knowledge Management Committee on 19 June 2005.

The new workplan encompasses the period post-system pilot to include a system rollout; reliant on a successful pilot evaluation, as well as a continuation of the HR and training reform process. The new workplan includes tasks that the JCD will complete after the closure of the AMIR Program in Jordan including an extension to the original HCDM workplan. The revised workplan is at Annex 2.

4.2.1 Incentives and HR Reform

Mr. John Howard's consultancy entitled 'Intelligence Unit Support – CASES Data Reformation' dated May 2005 recommended work that clearly aligned to the HCDM project. The Cases database records retrieves, and stores information about smuggling and customs violations in JCD. One of Mr. Howard's recommendations is that a finance/salary specialist reviews how to restructure salary and incentives to link salary and any additional payments directly to workplace performance. He suggests that such a restructure of salary and incentives would address the internal perception that the

incentives program is arbitrary and discriminatory and the public perception that it is inherently corruption by another name.

This recommendation increases the importance of one element of the HR reforms envisaged as part of the longer term HCDM planning, namely performance management and the performance to reward link. The HCDM workplan now lists a review aimed at identifying improved links between performance and salary and rewards. The consultants recognize this work requires the expertise of a salary/finance specialist.

4.2.2 HR and Training Reform Agenda

The consultant agreed to delay the JCD competencies framework and the development of the JCD key jobs to the roll out plan due to the time taken in Phase 3 for the consultation with the system vendor. This change in priorities is difficult to accommodate.

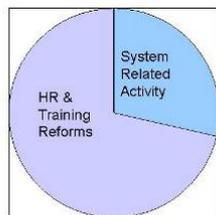


Fig 1. Phase 1 and 2 Comparative Priorities

Figure 1 displays the comparative priorities during Phase 1 and 2, between HR and training reforms and system activity.

Phase 3 has involved some tension for the consultants due to the sidelining of the HR reform agenda while the necessary system consultation takes place.

There was little opportunity to pursue the HR reforms during this period when key

personnel were already heavily committed to system consultation. Figure 2 represents the revised comparative priorities for Phase 3.

This situation has led to the postponement and rescheduling of some of the key HR and training reforms related to competencies, competency standards, and key operational jobs in the extension to the HCDM workplan.



Fig 2. Phase 3 Comparative Priorities

While this situation is disappointing, it is critical in a project like this to pace the change agenda according to the ability of the learning organization to manage and absorb new business processes and new business concepts while maintaining existing HR and training services to the JCD.

The system work has fully occupied the consultants as well as the business project managers reluctantly resulting in the decision to pursue only reforms that that

personnel other than the business project managers manage. See 6. below for further discussion on training reforms.

5. Pilot of New HR and Training System

The pilot of the new HR and training system got underway with a ‘kick off’ meeting at JCD on 23 May 2005. The meeting involved the Knowledge Management Committee members, Black Iris, Estarta, and MenaITech representatives. The schedule for the pilot runs through until November of this year and includes a one-month period of trialing the system on computers in the business owners, Directorate, Centers, and the Amman Custom House. The following table identifies proposed key players for the pilot period.

This kick-off meeting launched the pilot’s first phase namely the two-week envisioning or fact-finding stage. This stage involved on going consultation of system requirements and system design and modifications with the system vendor and is by far the most time consuming component of Phase 3 of this consultancy. In fact, the detailed discussions between JCD, AMIR Program, and Black Iris occupied the consultants for most of the time available. The consultation has been extremely demanding on JCD HR and training people as they balanced these discussions with day-to-day work and the additional demands of Directors/Managers as they prepared formal briefings for the new Director General.

5.1 HR Fact-Finding Stage

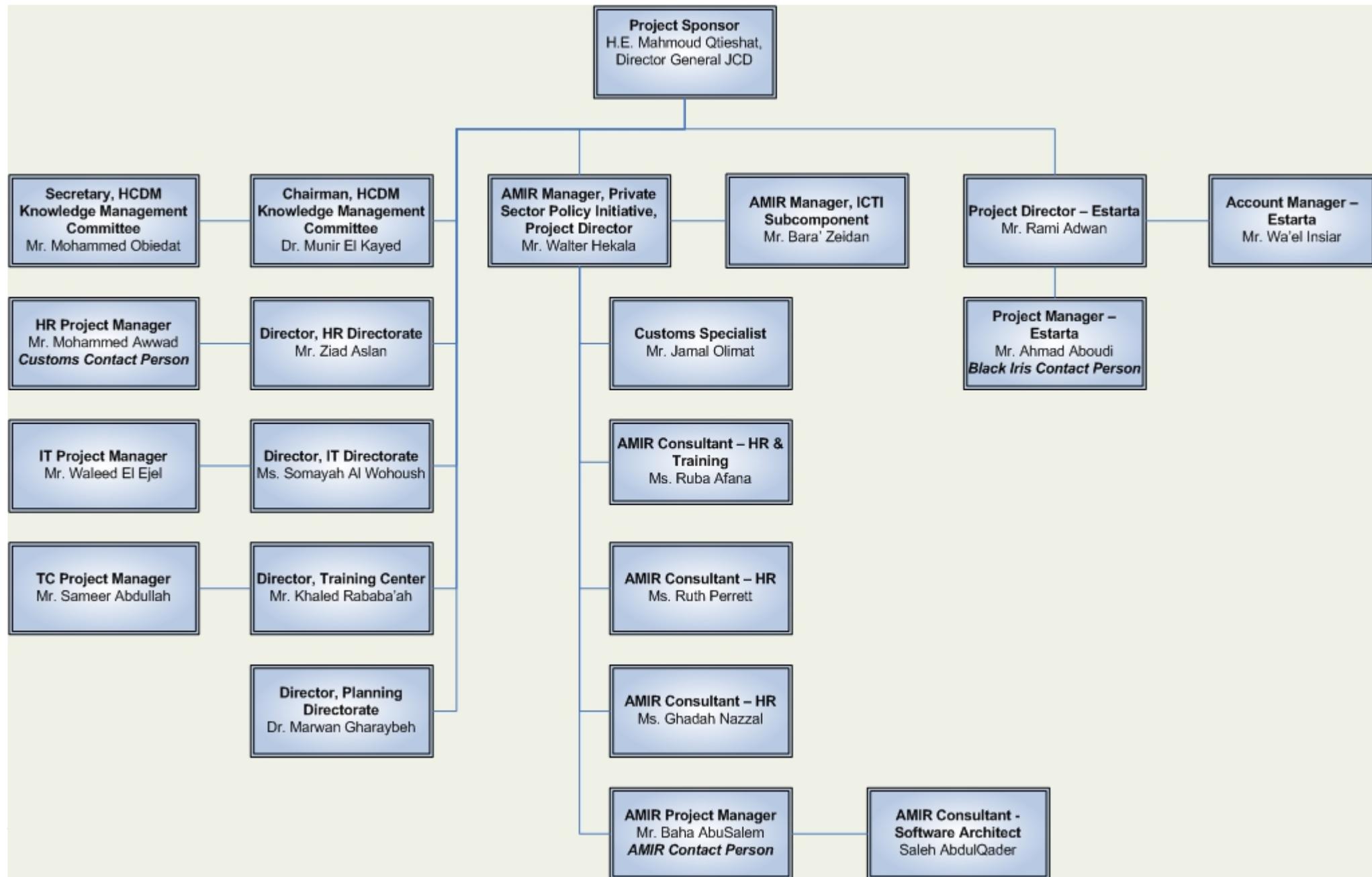
Jordan Customs Department HR personnel are currently operating a HR and attendance system that provides limited functionality and reporting but does provide JCD with a system that maintains many of the standard personnel records.

The HR business requirements stated in the RFP and responded to by Black Iris in their proposal are very detailed. The stakeholders put much time and discipline into ensuring JCD were happy about signing off on the business requirements back in Phase 2 of this consultancy. However, the discussions that took place as a fact-finding exercise by Black Iris to refine the business requirements were still demanding in terms of both time and people. Demands by JCD for both the familiarity of what they know in the old system and major enhanced functionality as stated in the RFP often surfaced during this period of intense engagement.

5.2 SAT and Training Fact-Finding Stage

Jordan Customs Department TC currently operates a system that provides very limited training management activity and has no system support for instructional design and evaluation. The TC was therefore obliged to discuss detailed system requirements for SAT, which was totally unfamiliar to them in a practical sense as well as considering the stated business requirements for the management of the training function. This was a very difficult task, compounded by the fact that Black Iris are unfamiliar with SAT and that no previous SAT system model was available for them to consider.

The lack of a previous SAT system was in one sense free of the temptation to compare it with what we have; however, it did place a huge burden on all parties to envisage accurately SAT as a JCD operating system, which appears to have been a secondary consideration when compiling the draft RFP.



5.3 Results of the Fact-Finding Stage of the Pilot

All parties cooperated in the fact-finding discussions in good spirits and cooperating in trying to achieve agreement on system implications of all RFP business items. However, a number of challenges faced the consultants during this stage of the pilot. These challenges included:

- Difficulty for some JCD people to ‘let go’ of current systems.
- Insufficient understanding of SAT by key parties.
- Maintaining strong discipline to keep within the identified scope of the RFP proposal.
- Gaining access to records of discussions and agreements in Arabic.
- Maintaining focus during meetings that in some cases lasted 5-6 hours.

The two-week fact-finding stage took an additional two weeks. At the end of that time, Black Iris was preparing a response outlining their solutions to the RFP because of the fact-finding stage. Early indications from the business users’ perspective include:

- Black Iris now understands the SAT concepts.
- Black Iris still has less understanding of details of the stages of SAT but Black Iris is accepting feedback and responding to the feedback. Final sign off will require detailed analysis by JCD and AMIR to ensure all elements of SAT are logically represented in the Black Iris response in accordance with their RFP response.
- System integration (SAT and Mena HR) would still appear to be simplistically represented with some JCD requirements using the functionality of both SharePoint Portal and Mena HR appearing unacceptably cumbersome with poor attention to user friendliness and the minimization of data input.

5.4 Concerns Regarding Early Stages of the HCDM Pilot

The first month of the pilot raises some concerns. The consultants are already discussed the following concerns with Estarta:

- The validity of Estarta’s project plan given that the first item in the plan took twice as long as anticipated.
- The degree of detailed understanding of SAT and the ability of the Estarta project team to provide a user-friendly and integrated solution to both training management and instructional or training design.
- Estarta’s ability to ensure their co-vendor, MenaITech, is responsive to AMIR Program and JCD requests for consultation.
- Availability of JCD project managers for consultation. Some directors are not providing sufficient leadership through backup/relief for project managers. Project managers are all trying to manage their own sections while putting in many hours in regular, sometimes daily, system consultation meetings. In the case of the HR Directorate, the most recent rotation appointment of an HR director without an HR background and requisite competencies unacceptably aggravates the problem. The deputy director of HR is also the HR and training project management from the JCD. He is a key person to the success or failure of the HR and Training reforms and is overextended.

6. Training Reforms including On the Job Training

6.1 On the Job Training

On the Job Training (OJT) is the one area of the reform agenda that progressed, and progressed quickly, during phase 3. There are three reasons for this:

- Preparatory discussions between the TC Manager and AMIR prior to Phase 3.
- Interest and enthusiasm generated by the new TC Manager about OJT as an item, which could be progressed independently of the HCDM system consultations, which fully occupied the TC HCDM Project Manager.
- Availability within AMIR of readily adaptable OJT training material.

This pleasing situation resulted in the following achievements in the area of OJT during Phase 3:

- Agreement by the new Director General for the TC Manager to introduce OJT as a formal training methodology in JCD – original OJT Proposal is at Annex 3.
- Review of a package of OJT material including the Field Training Officers Handbook and Resource Kit, OJT Coaching Instructors and Participants Manuals and accompanying set of overheads for application to JCD. These are now ready for sending out for translation into Arabic in preparation for TC staff to make further changes to meet their internal needs.
- Preparation of and agreement to an OJT workplan – see Annex 4.
- Preparation of a seminar outline for JCD directors to progress the broad training reform agenda and OJT in particular – see Annex 5.

6.2 Additional Training Reforms

The incentives that financially reward JCD staff who develop and deliver training cloud the use of subject matter experts (SMEs) for training development and delivery in the JCD program. This practice has resulted in the delivery of some courses in house that may well have resulted in better training outcomes if a genuine SME (internal or external) had prepared and delivered the training. Particularly concerning are instances where the trainer receiving the incentives was self-selected outside of the formal JCD training programs process.

The new Director General and the new TC Manager have recognized the need to address training delivery according to content and delivery expertise and to this end; the TC Manager is in the midst of discussing a potential MOU with Jordan University for the delivery of some of the Director General's training priorities: personal computer skills and English language training. In addition, the new Director General has agreed that the delivery of the JCD Directors' Management Training Package will be by internal JCD funding to an external subject matter expert(s).

7. Change Preparedness

The system consultation meetings provided an excellent venue to assess project managers' preparedness for adapting to a new system. The meetings were lengthy, testing, and often held in uncomfortable venues. People often displayed their underlying emotions about the new system through their body language, tone, and content of their input.

The process has lead the consultants to identify a couple of key people who are demonstrating a distinct reluctance to 'let go' of their current system which is therefore making it difficult for them to embrace the potential of the proposed system. The consultants recognize the magnitude of the change particularly for people who seem to have a sense of personal ownership of their current system.

This raises a separate but connected issue of long-term system sustainability. The current HR and training systems appear to be 'owned' and operated by only a couple of people in the TC and the HR Directorate. This presents a considerable business risk to have the operating knowledge of a key business system in the hands and heads of so few.

The consultants are therefore proposing a new approach to system 'ownership' in which system power users have trained and practicing 'back ups' who have responsibilities for some system functionalities and that these are rotated amongst others in the HR Directorate and Training Center. To address these issues, AMIR Program consultants will provide a change management workshop, with the objective of providing a business sustainability approach to the identification of personnel involved in the pilot training and pilot testing.

8. Conclusions and On-going Planning

The system pilot preparation will be a constant call on local consultants' time and expertise between now and the commencement of Phase 4. It is critical to take in consideration the project tasks, the time constraints, and needs of individual key players and key groups during this time of heightened activity.

The following planned activities for this period take into consider this approach:

- Change management workshop for HR and TC staff and the potential for individual coaching on adapting to new ways of doing things (people activity).
- Development of criteria to identify personnel to be involved in system training and pilot activity (people and task).
- Review of Black Iris's written proposal for completeness, workflow, integration, and user friendliness (task).
- Implementation of OJT workplan (task).
- Continue HR reforms through the introduction of competency standards and a competency framework.
- Facilitation of Directors' Management Training Program.

These activities reflect the recommendations made in the Executive Summary above.

In addition, the new Director General has indicated already that he has his own agenda in relation to training. This will need to be adopted and managed within the overall training reform agenda. That means designing, delivering, and evaluating new training using the SAT process and document using the revised TC common format. The strong interest of the DG in training indicates that the HCDM may well have its strongest supporter and critic leading the JCD. Such a healthy situation would position the project to fulfill its business potential.

Annex 1: HCDM Workplan Commencement of Phase 3

ID	Task Name	Duration	Start Date	Finish Date	Predecessors
1	Customs HCDM	238.25 days?	03-Oct-04	06-Sep-05	
2	Technical Tasks	223.25 days?	06-Oct-04	21-Aug-05	
3	HCDM Procurement & Implementation Team On boarding	128.25 days	06-Oct-04	11-Apr-05	
4	Project Planning and On boarding	4 days	06-Oct-04	11-Oct-04	
5	Compile HCDM Technical Plan	7 days	17-Oct-04	27-Oct-04	
6	Compile HCDM Implementation Plan	3 days	27-Oct-04	01-Nov-04	5,43
7	Determine and Document Systems Integration Requirements (for RFP)	10 days	12-Oct-04	27-Oct-04	
8	Determine and Document HCDM Detailed Requirements (for RFP)	15 days	12-Oct-04	04-Nov-04	4
9	Approve Detailed Requirements	3.43 days	06-Nov-04	10-Nov-04	8,7
10	Develop RFP	15 days	20-Oct-04	11-Nov-04	4
11	Approve RFP	2 days	16-Nov-04	17-Nov-04	10,44,9
12	Select Pilot Customs Departments (HQ & Branch)	1 day	02-Nov-04	03-Nov-04	
13	Pilot Locations Selected	0 days	03-Nov-04	03-Nov-04	12
14	Publish and Manage RFP	37 days	18-Nov-04	06-Jan-05	11,13
15	Proposals Received	0 days	06-Jan-05	06-Jan-05	14
16	Evaluate Proposals and Select HCDM Vendor	42 days	09-Jan-05	09-Mar-05	15
17	Evaluate Proposals	38 days	09-Jan-05	03-Mar-05	
18	Conduct Live Software Demo at Customs - Jordan	4 days	06-Mar-05	09-Mar-05	17
19	HCDM Vendor Selected	0 days	09-Mar-05	09-Mar-05	16
20	USAID Contact Office Approval to Proposed Budget	21 days	09-Jan-05	07-Feb-05	15
21	Contract Preparation	7 days	10-Mar-05	20-Mar-05	16
22	Contract HCDM Vendor	1 day	21-Mar-05	21-Mar-05	21
23	Contract HCDM Vendor Implementation Team Mobilization & On boarding	15 days	22-Mar-05	11-Apr-05	22
24	Pilot Implementation	95 days?	12-Apr-05	21-Aug-05	3
25	Pilot Implementation Re-Planning (based on selected Vendor)	4 days?	12-Apr-05	17-Apr-05	
26	Pilot Implementation Plan Sign-off	0 days	17-Apr-05	17-Apr-05	25
27	ALS Implementation Management	95 days	12-Apr-05	21-Aug-05	
28	Requirements Verification, Analysis, Pilot Acceptance Criteria	10 days?	12-Apr-05	25-Apr-05	
29	Implementation Design	5 days?	26-Apr-05	02-May-05	28

30	Implementation Development	10 days?	03-May-05	16-May-05	29
31	Implementation Test	5 days?	17-May-05	23-May-05	30
32	Acceptance Testing	5 days?	24-May-05	30-May-05	31
33	Deployment Planning	8 days	24-May-05	02-Jun-05	31
34	Deploy	25 days?	05-Jun-05	06-Jul-05	33,32,45
35	Deploy at HQ	5 days?	05-Jun-05	09-Jun-05	
36	Deploy at Branch(es)	5 days?	10-Jun-05	15-Jun-05	35
37	Business User Training	15 days?	16-Jun-05	06-Jul-05	35,36
38	Technical User Training	15 days?	16-Jun-05	06-Jul-05	35,36
39	Pilot Period	30 days?	16-Jun-05	27-Jul-05	35,36
40	Final Acceptance	0 days?	21-Aug-05	21-Aug-05	39,70
41	Business Tasks	238.25 days	03-Oct-04	06-Sep-05	
42	AMIR IT/HR integration (Project Management)	205 days	03-Oct-04	21-Jul-05	
43	Compile HCDM Business Plan	7 days	17-Oct-04	27-Oct-04	
44	Determine and Document Business Requirements (for RFP)	22 days	03-Oct-04	03-Nov-04	
45	Review and consolidate job descriptions	101 days	03-Oct-04	28-Feb-05	
46	Facilitate Knowledge Management Committee meetings	189 days	01-Nov-04	27-Jul-05	
47	Facilitate IPR training	8 days	16-Nov-04	24-Nov-04	
48	Project Management Training	11 days	20-Nov-04	02-Dec-04	
49	Document training administration process	4 days	04-Nov-04	10-Nov-04	
50	Prepare training administration proformas	5 days	10-Nov-04	20-Nov-04	49
51	Review and Consolidate training material	4 days	07-Jul-05	12-Jul-05	50,49,34
52	HR & TC Team Building Workshop	6 days	05-Dec-04	12-Dec-04	
53	Executive Start Up Workshop	1 day	23-Dec-04	23-Dec-04	
54	Presentation to Trainers on the suggested Training Material format	1 day	18-Jan-05	18-Jan-05	
55	Assess Directors' job descriptions and skill sets (for HQs only)	10 days	28-Feb-05	14-Mar-05	45
56	Presentation to Directors on organization restructure @ Australian Customs	2 days	16-Feb-05	17-Feb-05	
57	Develop phase 2 workplan HR & TC	2 days	16-Feb-05	17-Feb-05	
58	Testing job descriptions	20 days	28-Feb-05	28-Mar-05	45
59	Computing skills upgrade TC & HR staff	20 days	15-Mar-05	11-Apr-05	
60	HR/TC Workshop 1	5 days	14-Feb-05	20-Feb-05	
61	HR/TC Workshop 2	4 days	01-Mar-05	06-Mar-05	

62	HR/TC Workshop 3	4 days	14-Apr-05	19-Apr-05	52,61
63	Design standard training reports with TC staff	4 days	20-Apr-05	25-Apr-05	62
64	Workplace information sessions conducted by HR & TC	97 days	26-Apr-05	06-Sep-05	63
65	Design development plan for Directors	7 days	14-Mar-05	23-Mar-05	55
66	Deliver Directors training aligned to development plan (for HQs only)	75 days	23-Mar-05	05-Jul-05	65
67	Acquire Knowledge Management Committee Decision	0 days	05-Jul-05	05-Jul-05	65,66
68	Test Jordan Customs job descriptions against key Customs composite jobs*	14 days	09-May-05	26-May-05	55,58
69	Evaluation of business aspects of the pilot	10 days	28-Jul-05	10-Aug-05	39
70	Pilot Report to Knowledge Management Committee	7 days	11-Aug-05	21-Aug-05	69
71	Acquire Knowledge Management Committee Decision	0 days	21-Aug-05	21-Aug-05	69,70
72	Prepare Project Report	7 days	22-Aug-05	30-Aug-05	69,40
73	Project Celebration	1 day	31-Aug-05	31-Aug-05	72

Job descriptions were introduced in the report "AMIR Report - Human Resources Development - Phase I" developed by John Howard and Walter Hekala - June 2004

Legend	
Milestone	Milestone I
Task Completed	Task II

Annex 2: HCDM Workplan Accompanying Revised MOU**Customs HCDM**

Project Start Date: Sun 10/3/04

Project Finish Date: Sun 12/31/06

HCDM Project Schedule - Pilot & Rollout

ID	Complete	Task Name	Start Date	Finish Date	Predecessors
1	11%	Customs HCDM	Sun 10/3/04	Sun 12/31/06	
2	17%	Pilot Phase	Sun 10/3/04	Wed 5/31/06	
3	67%	Technical Tasks	Wed 10/6/04	Thu 10/13/05	
4	100%	HCDM Procurement & Implementation Team On boarding	Wed 10/6/04	Thu 5/26/05	
5	100%	Project Planning and On boarding	Wed 10/6/04	Mon 10/11/04	
6	100%	Compile HCDM Technical Plan	Sun 10/17/04	Wed 10/27/04	
7	100%	Compile HCDM Implementation Plan	Wed 10/27/04	Mon 11/1/04	6,28
8	100%	Determine and Document Systems Integration Requirements (for RFP)	Tue 10/12/04	Wed 10/27/04	
9	100%	Determine and Document HCDM Detailed Requirements (for RFP)	Tue 10/12/04	Thu 11/4/04	5
10	100%	Approve Detailed Requirements	Sat 11/6/04	Wed 11/10/04	9,8
11	100%	Develop RFP	Wed 10/20/04	Thu 11/11/04	5
12	100%	Approve RFP	Tue 11/16/04	Wed 11/17/04	11,29,10
13	100%	Select Pilot Customs Departments (HQ & Branch)	Tue 11/2/04	Wed 11/3/04	
14	100%	Pilot Locations Selected	Wed 11/3/04	Wed 11/3/04	13
15	100%	Publish and Manage RFP	Thu 11/18/04	Thu 1/6/05	12,14
16	100%	Proposals Received	Thu 1/6/05	Thu 1/6/05	15
17	100%	Evaluate Proposals and Select HCDM Vendor	Sun 1/9/05	Mon 3/28/05	16
18	100%	Evaluate Proposals	Sun 1/9/05	Mon 3/28/05	
19	100%	Conduct Live Software Demo at Customs - Jordan	Sun 2/27/05	Tue 3/15/05	
20	100%	HCDM Vendor Selected	Mon 3/28/05	Mon 3/28/05	17
21	100%	USAID Contact Office Approval to Proposed Budget	Tue 3/29/05	Tue 4/26/05	16,20
22	100%	Contract Preparation	Tue 3/29/05	Wed 4/6/05	17
23	100%	Contract HCDM Vendor	Wed 4/27/05	Wed 4/27/05	22,21
24	100%	Contract HCDM Vendor Implementation Team Mobilization & On boarding	Sun 5/15/05	Thu 5/26/05	23
25	0%	Pilot Implementation	Sun 5/29/05	Thu 10/13/05	4
26	7%	Business Tasks	Sun 10/3/04	Wed 5/31/06	
27	0%	AMIR IT/HR integration (Project Management)	Sun 10/3/04	Sun 7/24/05	
28	100%	Compile HCDM Business Plan	Sun 10/17/04	Wed 10/27/04	

29	100%	Determine and Document Business Requirements (for RFP)	Sun 10/3/04	Wed 11/3/04	
30	0%	Review and consolidate job descriptions	Sun 10/3/04	Tue 4/5/05	
31	0%	Facilitate Knowledge Management Committee meetings	Mon 11/1/04	Thu 7/28/05	
32	100%	Facilitate IPR training	Tue 11/16/04	Wed 11/24/04	
33	100%	Project Management Training	Sat 11/20/04	Thu 12/2/04	
34	100%	Document training administration process	Thu 11/4/04	Wed 11/10/04	
35	100%	Prepare training administration proformas	Wed 11/10/04	Sat 11/20/04	34
36	0%	Review and Consolidate training material	Sat 11/20/04	Wed 11/24/04	35,34
37	100%	HR & TC Team Building Workshop	Sun 12/5/04	Sun 12/12/04	
38	100%	Executive Start Up Workshop	Thu 12/23/04	Thu 12/23/04	
39	100%	Presentation to Trainers on the suggested Training Material format	Tue 1/18/05	Tue 1/18/05	
40	100%	Assess Directors' job descriptions and skill sets (for HQs only)	Mon 2/28/05	Mon 3/14/05	30
41	100%	Presentation to Directors on organization restructure @ Australian Customs	Wed 2/16/05	Thu 2/17/05	
42	100%	Develop phase 2 work plan HR & TC	Wed 2/16/05	Thu 2/17/05	
43	0%	Testing job descriptions	Tue 4/5/05	Tue 5/3/05	30
44	100%	Computing skills upgrade TC & HR staff	Tue 3/15/05	Mon 4/11/05	
45	100%	HR/TC Workshop 1	Mon 2/14/05	Sun 2/20/05	
46	100%	HR/TC Workshop 2	Tue 3/1/05	Sun 3/6/05	
47	0%	HR/TC Workshop 3	Sun 5/15/05	Thu 5/19/05	37,46
48	0%	Design standard training reports with TC staff	Wed 6/8/05	Sun 6/12/05	47
49	0%	Workplace information sessions conducted by HR & TC	Sun 6/12/05	Tue 10/25/05	48
50	100%	Design development plan for Directors	Mon 3/14/05	Wed 3/23/05	40
51	0%	Deliver Directors training aligned to development plan (for HQs only)	Sun 7/10/05	Thu 9/8/05	50
52	0%	HCDM Solution Customization	Mon 5/23/05	Tue 8/30/05	
53	0%	Envisioning discussions with Estarta/Black Iris – early HR and SAT consultation	Mon 5/23/05	Mon 6/6/05	
54	0%	Consultation on customization solutions – HR and SAT	Mon 5/23/05	Tue 8/30/05	
55	0%	Test Jordan Customs job descriptions against key Customs composite jobs (see task note)	Wed 8/10/05	Tue 9/13/05	40,43
56	0%	Acquire KMC Decision on MOU with Black Iris	Wed 5/25/05	Sun 6/5/05	50
57	0%	Prepare draft pilot evaluation plan	Wed 6/15/05	Thu 6/30/05	
58	0%	Consultation regarding draft evaluation plan	Sun 7/10/05	Wed 7/20/05	
59	0%	Complete JCD organization/structure	Mon 5/23/05	Mon 5/30/05	

		chart			
60	0%	Establish HR and TC newsletter – roles responsibilities, timeframes etc	Mon 5/30/05	Tue 6/14/05	
61	0%	Deliver regular HR & TC newsletter	Thu 6/16/05	Wed 5/31/06	60
62	0%	Validation of non-operational jobs	Tue 5/31/05	Tue 6/21/05	30
63	0%	Review job/person codes	Tue 5/31/05	Sun 6/12/05	59
64	0%	Assess effectiveness of single point communication strategy	Sun 5/29/05	Sun 6/12/05	
65	0%	Formalize TC delegations	Mon 5/23/05	Sun 6/12/05	
66	0%	Consultation on customization solutions – HR and SAT	Sun 7/17/05	Tue 8/30/05	
67	0%	Identify privileges for levels of system access for pilot	Tue 7/5/05	Sun 7/17/05	59
68	0%	Identify key personnel for system training program	Wed 8/10/05	Sun 8/21/05	30,59,62
69	0%	TC consultation/monitoring/documenting system training activity and personnel	Tue 9/6/05	Thu 9/15/05	
70	0%	Testing of HR and SAT customization with end users	Sun 9/11/05	Thu 10/13/05	
71	0%	Monitoring of system testing with end users	Sun 9/11/05	Thu 10/13/05	
72	0%	Identify and document operational training infrastructure, activity & personnel	Sun 8/14/05	Sun 8/21/05	
73	0%	Prepare O-T-J training strategy	Mon 8/22/05	Mon 9/12/05	72
74	0%	Develop roll out strategy	Sun 9/25/05	Wed 10/12/05	
75	0%	Conduct pilot evaluation	Wed 8/31/05	Thu 10/13/05	52
76	0%	Evaluate directors' management training program	Sun 9/11/05	Sun 12/25/05	51
77	0%	Evaluation of business aspects of the pilot	Wed 9/14/05	Thu 9/29/05	55
78	0%	Pilot Evaluation Report to KMC	Mon 10/10/05	Thu 10/20/05	58
79	0%	Acquire KMC Decision on Pilot Evaluation and Rollout	Thu 10/20/05	Thu 10/20/05	77,78
80	0%	Prepare Project Report	Sun 10/2/05	Mon 10/10/05	77
81	0%	Project Celebration	Tue 10/11/05	Tue 10/11/05	80
82	0%	Rollout Phase	Sun 10/2/05	Mon 7/31/06	
83	0%	Technical Tasks	Sun 10/9/05	Wed 11/30/05	
84	0%	Develop Rollout RFP	Sun 10/9/05	Thu 10/20/05	
85	0%	Publish RFP to Black Iris	Sun 10/23/05	Thu 11/3/05	79,84
86	0%	RPF Questions/Answers	Sun 10/23/05	Thu 11/3/05	
87	0%	Receive and evaluate the Black iris proposal	Sun 11/6/05	Thu 11/10/05	86
88	0%	Request and receive CO consent	Sun 11/13/05	Thu 11/17/05	87
89	0%	Contract to Black Iris	Sun 11/20/05	Sun 11/20/05	88
90	0%	Acquire Additional Software Licensing	Wed 11/30/05	Wed 11/30/05	89
91	0%	Business Tasks	Sun 10/2/05	Mon 7/31/06	

92	0%	Publicize roll out strategy including timetable	Tue 11/1/05	Wed 11/30/05	74
93	0%	Design and deliver site information sessions	Tue 11/1/05	Thu 3/30/06	74
94	0%	Deliver user training	Tue 11/1/05	Tue 2/28/06	69
95	0%	Implement roll out monitoring program	Sun 1/1/06	Tue 2/28/06	74
96	0%	Implement O-T-Job training strategy	Sun 10/2/05	Sun 4/30/06	73
97	0%	Develop JCD key jobs framework and associated competency framework	Sun 1/1/06	Thu 6/29/06	55
98	0%	Review job descriptions to include competency measures	Sun 4/2/06	Wed 5/31/06	
99	0%	Review annual evaluation process to include assessment against competency measures	Mon 5/1/06	Mon 7/31/06	
100	0%	Review of salary structure	Wed 3/1/06	Thu 3/30/06	
101	0%	Identification of strategy to align performance and pay	Sun 4/2/06	Sun 4/30/06	100
102	0%	HCDM evaluation and report	Sun 4/2/06	Wed 5/31/06	
103	0%	Program hand over	Mon 5/1/06	Wed 5/31/06	
104	0%	Post-AMIR	Thu 6/1/06	Sun 12/31/06	
105	0%	Conduct roll out evaluation	Thu 6/1/06	Thu 6/29/06	
106	0%	Review and implement recommendations from roll out evaluation	Sun 7/2/06	Thu 9/28/06	105
107	0%	Develop plan to implement strategy to align pay to performance	Thu 6/1/06	Sun 7/30/06	101
108	0%	Implement pay and performance strategy	Mon 7/31/06	Sun 12/31/06	107

Annex 3: On the Job Training Proposal

Structured On the Job Training (OJT) for Jordanian Customs Department

Introduction

Structured OJT is a training method that is used in the systems Approach to Training (SAT). SAT ensures that training is developed in an orderly fashion, includes an in-depth needs analysis of the tasks and trainees, allows for development and tryout of training prior to full implementation, and incorporates evaluation and continuous improvement within all aspects of the process. When used wisely and appropriately, structured OJT can be as effective as many off-the-job training methods. It is also a planned instruction occurring on the job and during work and is delivered as a collateral duty by an experienced coworker or supervisor trained in coaching techniques; and documents the training process. In other words, a structured OJT includes a planned process with specific outcomes where an experienced employee trains new employees in the actual work place.

Currently classroom training can be either at the Customs Training Center or at a remote location such as at a Custom Center. Both classroom training at the Customs Training Center and at remote locations is currently practiced by the Jordan Customs. The decision of the location of classroom training is most often driven by cost factors. Is it less expensive to bring the trainers to the trainees or the trainees to the trainers? Instructors may be internal staff, vendor trainers or a combination of both, and the curriculum is based on specific training needs.

OJT is not practiced at the JCD in a formalized way. All new staff receive training on the job when they are hired or re-located, but not in a systemized manner. This is called unstructured On the Job Learning.

On the Job Training is different from On the Job Learning. In On the Job Learning, the employee is often left to learn on their own, an inefficient process. In *Formal On the Job Training*, as in classroom training, a systematic approach to providing learning opportunities is provided to the trainee. On the Job Trainers, like classroom instructors, use proven training techniques, such as the familiar practice of using a Training Diary, or similar training record. Training is provided from established materials identifying the subject matter to be covered in the training. Using a common training system and common coaching techniques for the delivery of On the Job Training insures quality delivery. Using the same training materials by all trainers for each particular topic insures the quality of the subject matter content.

Currently, the Jordan Customs Department is preparing to meet the continuous need for adapting to changing environments through training. To meet this objective, the Customs Administration should receive assistance in defining itself as a **Learning Organization** and using a **Systems Approach to Training (SAT)**. On the Job Training is a component of a modern training program for a learning organization using the SAT, as are classroom training and the Training Center.¹

¹ Attachment 1 is a flowchart for on the job training.

To assist the Jordan Customs Department in the further development of its Training Center and a modern training structure, materials are being prepared by the Customs Training Team, using the Systems Approach to Training (SAT).

On the Job Training (OJT) provides:²

- an effective precursor to classroom training;
- a bridge for the transit of skills and techniques learned in the classroom to the “real time, real world” work environment of Customs;
- crucial training methodology when classroom training is not practical.

The organizational structure of JCD

Currently, the JCD has a training center functioning since 1998.

Current training practices of OJT

A “remote-site classroom training” system is identified at the Customs Department controlled and managed by the Customs Training Center.

Budgetary limitation issues are mainly forcing such a training system. The need for a structured OJT for JCD is urgent. Therefore, the following steps should take place prior to any structured OJT. This will include:

1. Analyze tasks that need to be learned and identify the outcomes of the OJT.
2. Select the participants in the process (Supervisor, Field Training Coordinator, and Field Training Officer) and assure they have expertise in both the task being trained and training skills and techniques.
3. Prepare training material including instructor manual and participant manual.
4. Deliver the structured OJT. This stage can be divided into the following:
 - a. Explain the tasks required from the trainee.
 - b. Demonstrate the tasks that need to be learned.
 - c. Let the trainee practice what he learned under your supervision.
 - d. Evaluate the performance of the trainee after the training is finished.
This evaluation should be on-going.
5. Proper documentation of the whole process.
6. Finally, evaluate the entire OJT process.

Proposal

To meet the current and future needs of Jordan Customs Department, the following action plan is suggested:

1. The Customs Expert will work in an advisor capacity with JCD. The Selected Customs Officer(s) from JCD will be assisted by the Consultant in:
 - Further review of current Customs legislation governing the practical On the Job Training in the Customs Administration.
 - Review of current Customs curriculum and procedures regarding OJT.

² Attachment 2 is breakout of OJT training use

- Review of current Instructional Material.
 - Development, within the context of the Customs Administration’s governing legislation and procedures, of an On the Job Training Program³ adapted to the current needs and future requirements of the Customs Administration. Program development will include:
 - Administration
 - Guidelines
 - Procedures
 - Training Curriculum
 - Training Materials
 - Instructors and Training Delivery
 - Monitoring and Follow up
2. The Customs will be assisted in organizing OJT follow on training to classroom training delivered.

To insure the quality, consistency, and transparency of the delivery of the On the Job Training, the following recommendations are made:

1. All OJT coaches will use the training methodology and system selected by the Customs Administration.
2. Coaches will, for all subject matter, use the same training reference materials and training guides as approved by the Customs Administration.
3. All On the Job Training will be coordinated through the Customs Training Center.

By using a common approach to OJT training, a training structure that will become an integral component of the Customs Administration’s Training Program will be developed. All materials used in the On the Job Training will be incorporated into the Training Libraries for the Customs Administration.

Attachments

1. Flow chart for On the Job Training
2. Breakout of OJT training use
3. Materials drafted and prepared for use by the Customs Administration

³ Materials drafted and prepared for use by the Customs Administration are listed in Attachment 3.

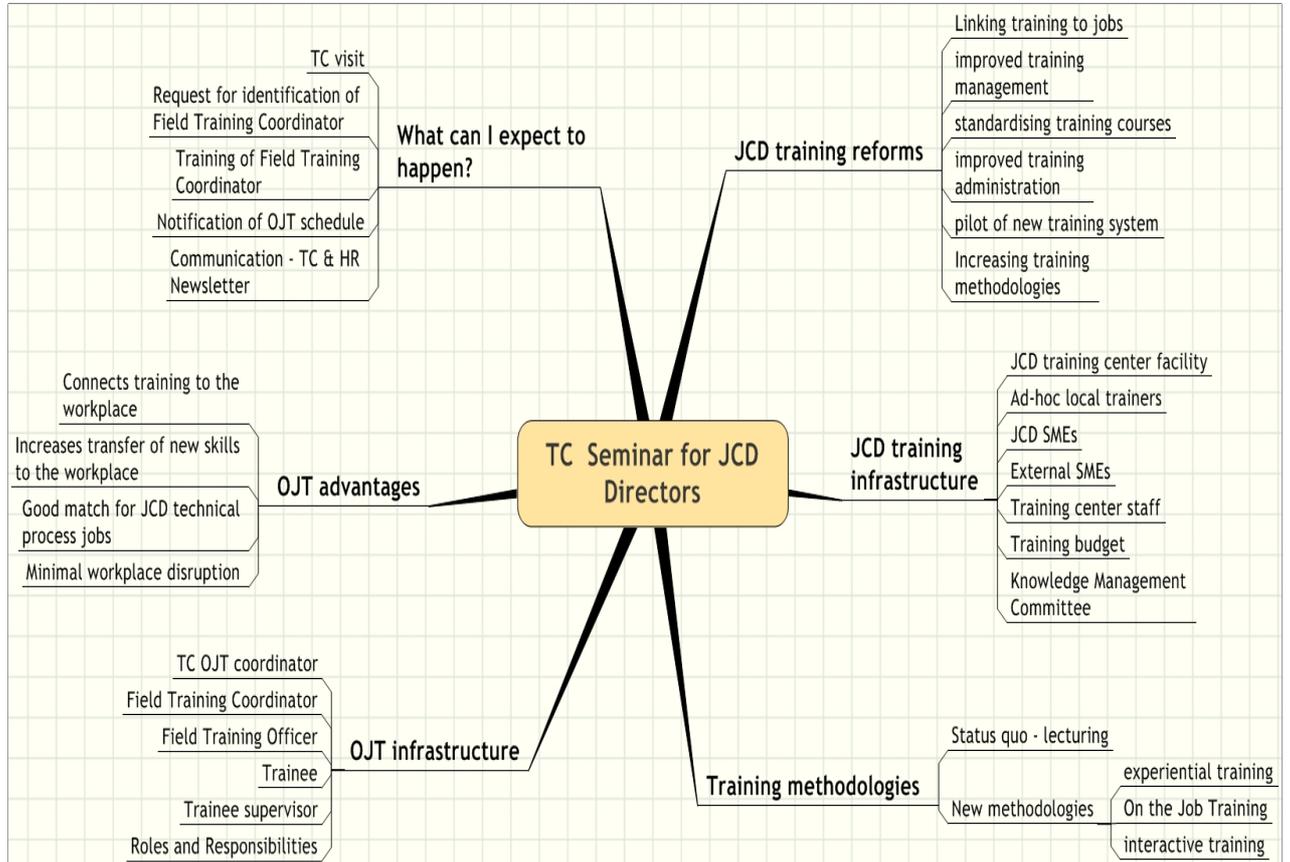
Annex 4: On the Job Training Workplan

Draft Workplan for Introduction of OJT

Aim: To develop JCD's informal workplace training into a formalized OJT program managed by JCD Training Center

Task	Involve	Resources	Dates	Status
OJT proposal prepared for DG	AMIR KMC	Mr Rubaba'h	13 June	Completed
Nominate OJT Project Manager to manage OJT program	TC	Director General, Mr Rubaba'h		
Training Reform and OJT Presentation to JCD Directors	Director General JCD Directors	Mr Rubaba'h, Walt Hekela, Ruba Afana (draft presentation available)		
JCD newsletter articles	Planning Directorate	TC OJT project manager		
OJT Coaching manuals prepared	AMIR TC	Ruba Afana (draft material in English – sending for translation) OJT Project Manager to review Arabic version and prepare for publishing		Commenced
Selection of Field Training Coordinators	JCD Directors AMIR (re competencies of FTCs)	OJT Project Manager		
Training of FTC	JCD Directors	OJT Project Manager		
Selection and training of Field Training Officers	JCD Directors	OJT Project Manager and FTCs		
Evaluation of preparation for delivery of OJT	JCD Directors FTCs FTOs	Mr. Rubaba'h OJT Project Manager		

Annex 5: Outline of Training Center (OJT) Seminar for JCD Directors



Annex 6 Consultations

Consultations took place with the following people and groups during the period 22 May – 22 June 2005:

22 May	AMIR personnel
23 May	Pilot ‘kick off’ meeting with JCD, AMIR and Black Iris
24 May	AMIR Project Team
31 May	TC Manager and team, Training Centre HR Director and team Director, Planning
1 June	HCDM system consultation (HR and SAT) – Black Iris, JCD, AMIR
2 June	HCDM system consultation (HR and SAT) – Black Iris, JCD, AMIR
5 June	HCDM system consultation (HR) – Black Iris, JCD, AMIR Knowledge Management Committee
6 June	TC manager and team – OJT training proposal
7 June	HCDM system consultation (SAT) – Black Iris, TC, AMIR
9 June	HCDM system consultation (SAT) – Black Iris, TC, AMIR
12 June	HCDM system consultation (reports) – Black Iris, AMIR, HR HCDM system consultation (SAT) – Black Iris, TC, AMIR
14 June	HCDM system consultation (SAT) – Black Iris, TC, AMIR
15 June	HCDM – AMIR project team and JCD project managers HCDM system consultations (reports) – Black Iris, TC, AMIR, HR
16 June	TC Manager - OJT planning
19 June	Knowledge Management Committee
20 June	HCDM – AMIR team HCDM system consultation (SAT) – Black Iris, TC, AMIR
21 June	HCDM system consultation (SAT) – Black Iris, AMIR
22 June	HCDM Phase 3 debrief – AMIR, USAID