Reskilling Toolkit

Accelerating the Gears of Transformation

MISSION SERVICE STEWARDSHIP

IT Modernization

Data, Accountability and Transparency

People — Workforce of the Future

PRESIDENT'S MANAGEMENT AGENDA

UNITED STATES OFFICE OF PERSONNEL MANAGEMENT

A resource for agency leaders, managers, supervisors and employees who are involved in reskilling or upskilling. If you have a successful practice to contribute to the Toolkit, please send it to workforce@opm.gov.

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RESKILLING TOOLKIT

The Reskilling Toolkit contains information, guidance, tips, and resources on how to reskill and/or upskill employees impacted by major workforce changes, such as automation. The toolkit aligns to the Human Capital Framework (HCF), which guides agencies through the four different systems of the human capital management life cycle (see Appendix A). Continuous reskilling and upskilling contributes to fostering a culture of continuous learning. By actively managing the workforce and developing agile operations, agencies better position themselves for effective and efficient achievement of their mission and goals. As technology continues to advance, digitization and automation will eliminate or lead to changes of work roles or tasks within positions. For example, some of the top labor-intensive Federal activities with automation potential are:

- Retrieving and Synthesizing Data
- Providing some Customer Service Activities
- Performing some Administrative Activities

The purpose of this Toolkit is to assist agencies with meeting their President's Management Agenda's goal "Developing a Workforce for the 21st Century," while adhering to the Merit System Principles. It serves as a resource for agency leaders, managers, supervisors and employees who are involved in planning, implementing, and/or receiving reskilling or upskilling efforts.

The information in this toolkit is a compilation of the U. S. Office of Personnel Management's (OPM) guidance and tools, in collaboration with agency partners, such as the Office of Management and Budget (OMB), National Science Foundation (NSF), and the U.S. Department of Housing and Urban Development (HUD).

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What is Reskilling?

Reskilling is training individuals who have shown they have the aptitude to learn in a completely new occupation.

What is *Upskilling?*

Upskilling is training individuals in the same occupation, but in a new way (i.e., if automation overtakes certain job duties, training that individual in new work).

Who are the Stakeholders?

Role	Responsibilities for Reskilling & Upskilling
Agency Leaders, Sr. Leaders, C-Suite	Within the legal framework, determine agency priorities and goals, identify the strategies and resources required to achieve the agency's mission and evaluate progress towards goals using data and performance results. Foster positive working relationships with employees to achieve the agency's mission.
Managers, Supervisors, Team Leaders	Within the legal framework, implement the strategies, acquire and manage the resources required to achieve the agency's mission and collect and provide performance data for accurate evaluation of progress towards goals. Foster positive working relationships with employees to achieve the agency's mission.
Employees	Within the legal framework, be a successful contributor and seek opportunities to enhance your knowledge, skills and abilities. Own your professional development and career goals. Foster positive working relationships with management, leadership and colleagues to achieve the agency's mission.
Enterprise Risk Managers	Within the legal framework, identify performance and mission risk at all levels (strategy, tactical and operational).
Unions	Within the legal framework, advocate for measures that will foster fairness within the structure of agency reskilling and upskilling efforts and inform the leadership of members' concerns.
Federal Partners (non-profit, non-partisan organizations, Federal	Provide insight, training solutions and products.

What are the Benefits of Reskilling or Upskilling for Managers, Supervisors, and Employees?

Managers

- Mission Accomplishment
- Future-focused
- Improved Customer Service
- Well-developed workforce
- Engaged workforce
- Employee Retention
- Pipeline of qualified employees
- Knowledge management/knowledge transfer

Supervisors

- Reduce skills gaps
- Prepare workforce
- More productive employees
- Create culture of continuous learning

Employees

- Opportunity to change positions
- Learn new skills
- Remain engaged
- Begin new career

How do you Communicate Change?

Change Management is when agency leadership is committed to reviewing, implementing, and communicating organizational enhancements and collectively inspiring employees to achieve significant, sustained, and measurable improvements in performance on an ongoing and regular basis. The ability of change sponsors and leaders to communicate effectively about the change is key to its ultimate success. Change sponsors (i.e., Agency Leaders, Sr. Leaders and Executives) and leaders (i.e., Managers, Supervisors and Team Leaders) should take the personal/psychological aspects of change into account when managing and communicating about change. **Recommended practices for communicating change are**:

Recognize responses to change are necessary and normal. Employees are going to experience a wide range of feelings.

Know that employees will not move faster through the change than change sponsors and leaders do. Hence, if leaders become stuck, employees will become stuck too. It is important for managers to correctly understand their own feelings about the change and to take care of themselves.

Anticipate and allow for strong emotions. Allow employees to "let off steam." Recognize and communicate that emotions are not only natural, but also a necessary part of the change and transition process. Find productive venues for people to express their anger, frustration, confusion, anxiety, etc.

Increase information flow. Significant change can produce fear. Perceptions become distorted. Employees want to know where they will end up.

Try to keep the familiar in place. Change sponsors and leaders should ask themselves what they can leave in place that will create a sense of stability.

Communicate first through action, then words. In other words, "walk the talk." Leadership statements, no matter how well crafted, only deliver conflicting and ultimately alienating messages to the workforce if leadership's behavior is inconsistent with the underlying values or vision expressed. Behavioral integrity is of utmost importance when communicating change. Employees expect leadership to walk the talk and to operate with integrity. In addition, leadership should communicate clear goals and use common language during the change initiatives.
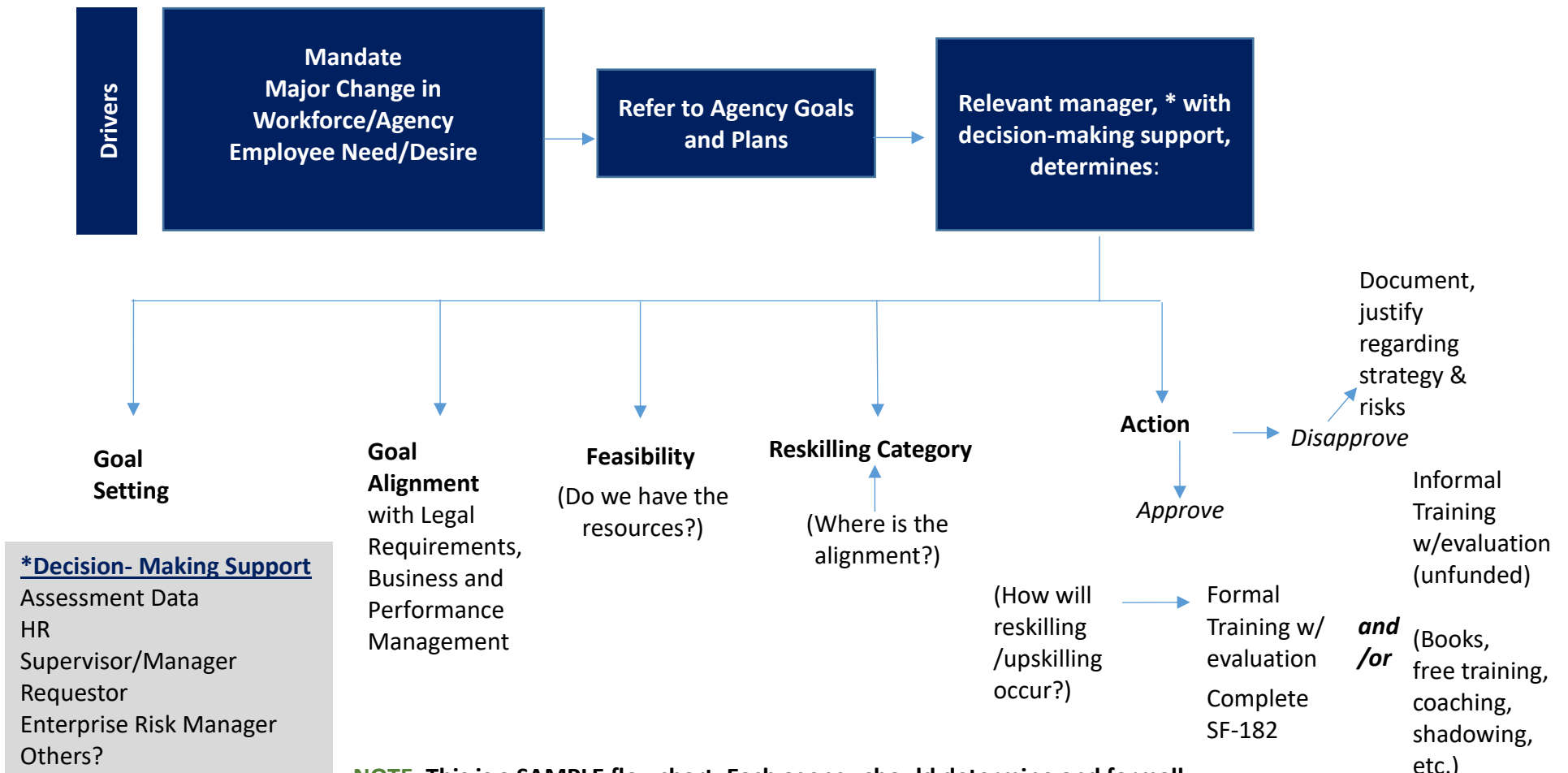
Planning is key to an effective reskilling and upskilling program. It is important to set the strategic direction; identify the skill gaps; conduct workforce analysis; develop and implement action plans; monitor and evaluate the performance of the programs; and develop and communicate a reskilling/upskilling strategy.

When to Reskill or Upskill?

There are several options to reshape the workforce, such as recruiting, voluntary separation incentive payments, or voluntary early retirement. **The *Workforce Reshaping Executive Playbook*** contains plays representing key Human Capital Strategies agencies can use to shape and build a modern workforce for the 21st century. How do you know when to reskill or upskill? Let's take a look at the *sample* Reskilling and Upskilling Toolkit Flowchart and the sample Reskilling and Upskilling Logic Model to see how they can assist when considering reskilling or upskilling. The Reskilling and Upskilling Toolkit Flowchart is a roadmap that contains examples of areas a manager should consider when faced with a workforce reskilling issue.

Reskilling and Upskilling Toolkit Flowchart

Drivers

Mandate
Major Change in
Workforce/Agency
Employee Need/Desire → **Refer to Agency Goals and Plans** → **Relevant manager, * with decision-making support, determines:**

Goal Setting

Goal Alignment
with Legal Requirements, Business and Performance Management

Feasibility
(Do we have the resources?)

Reskilling Category
(Where is the alignment?)

(How will reskilling /upskilling occur?)

Action

Approve

Disapprove

Formal Training w/ evaluation
Complete SF-182

and /or

Document, justify regarding strategy & risks

Informal Training w/evaluation (unfunded)

(Books, free training, coaching, shadowing, etc.)

*Decision- Making Support
Assessment Data
HR
Supervisor/Manager
Requestor
Enterprise Risk Manager
Others?

NOTE: This is a SAMPLE flowchart. Each agency should determine and formally document the process flow specific to their reskilling or upskilling efforts.

Managers may receive drivers to reskill in the form of: executive mandate, a major change in the workforce or agency or an employee's request to reskill. *To act on the drivers*, managers should refer to agency guidance on reskilling.

With *decision making support,* from relevant agency information, stakeholders and decision makers (e.g., assessment data, HR, Executive Resource Management Office, immediate supervisor) the manager should:

- Determine feasibility
- Determine alignment of the request/mandate (e.g., strategic, operational, and technical).

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EXAMPLES OF DRIVERS

- Agency Goals
- Major Change in Agency Mission
- Restructure of Agency Workforce
- Different Work or Change in How Work is Accomplished
- Employee Desire or Need

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Finally, *a final decision* should be made to either approve/follow through with the reskilling or upskilling activity, or disapprove/do not follow through with the activity. If the activity is valid, feasible and aligned with the reskilling or upskilling strategy, but if action is not taken to reskill or upskill, the manager should formally document and justify the decision.

The Reskilling and Upskilling Logic Model

A sample approach to reskilling or upskilling is depicted by using the Reskilling and Upskilling Logic Model format. Logic models are very easy tools to help you plan and evaluate your training program. A logic model provides a representation of a "theory of change" (if...then) that clearly aligns the training inputs and activities to the outputs and results. Logic models are created in the planning phase and can be completed for programs, initiatives, individual courses, events and activities.

Reskilling and Upskilling Logic Model Example

This Reskilling and Upskilling Logic Model serves as a sample visual for planning, implementing and evaluating the performance of these efforts.

Drivers	Inputs	Activities		Outputs	Outcomes
Agency Goals and Plans Mandate Major Change in Agency or Workforce Different Work or Change in How Work is Accomplished Employee Desire or Need PMA	Time Financial Resources Federal Partners Equipment Facilities Staff Technology Data	**PLANNING** Conduct Job Analysis Position Management Review Identify Agency Skills and Performance Gaps Develop and Communicate a Reskilling or Upskilling Strategy	**IMPLEMENTATION** Mentoring Programs Coaching Programs Rotation Opportunities Details Training—Internal and External Shadowing Programs Blended Learning Online Training Career Paths	Percent of Competency and Skills Gaps Closed Percent of employees who participate in training Percent of employees who participate in mentoring, shadowing or coaching programs Manager satisfaction with quality of reskilled or upskilled employees Employee overall satisfaction	**SHORT TERM** Position Agency for the Future Reduced Skills Gaps New Opportunities; New Career Improved Performance **LONG TERM** Mission Achievement Continuous Learning Culture Engaged Workforce

ASSUMPTIONS
What unexamined beliefs about people involved, leadership support, and agency context influence the inputs, activities, outputs and outcomes?

EXTERNAL INFLUENCES
What in the external social, economic, etc., environment could positively or negatively interact with and/or influence outcomes?

Readiness to Reskill

Before your reskilling or upskilling effort begins, the strategic direction should be set. Information on this step is available in the ***Workforce Reshaping Executive Playbook.*** Leadership commitment and direction are critical for a successful reskilling or upskilling effort.

Key Factors

Some key factors to ensure effective reskilling and upskilling are:

➢ Leadership support
➢ Appropriate resources
➢ Workforce Plans and policies to support reskilling and upskilling

Assess Key Factors

Assess your agencies readiness to reskill or upskill:

✓ Does agency leadership support reskilling or upskilling?
✓ Do you have the appropriate resources to effectively reskill or upskill?
✓ Does your agency Human Capital Operating Plan (HCOP), workforce, strategic and/or performance plans support reskilling or upskilling?
✓ Do your agency policies (to include Collective Bargaining Unit Agreements) support upskilling and reskilling?

If no is the answer to one or more of these questions, then you need to address those factors.

Key Workforce Planning Data

Key Workforce Planning Data

- Personnel Data
- Position Classification
- Job Analysis
- FedScope
- Staffing Gap Charts
- Agency Dashboards
- Time-to-Hire
- Agency Retention, Turnover, Transfer and Retirement Data
- Employee Surveys
- Focus Groups
- Occupational Questionnaires
- Competency Assessments
- Government Accountability Office Reports
- Internal Agency Audits
- Benchmarking Data (industry and government)

See the Resource Page for a full listing of data sources, to include:

Federal Employee Viewpoint Survey
https://www.opm.gov/fevs

Unlocking Federal Talent
https://www.unlocktalent.gov

Analyze Workforce, Identify Skills Gaps and Conduct Workforce Analysis by:

- Determining what the current workforce resources are and how they will evolve over time through turnover, etc.
- Developing specifications for the kind, number, and location of workers and managers needed to accomplish the agency's strategic requirements for reskilling and upskilling.
- Determining what gaps (staffing and skills) exist between the current and projected workforce needs.

Desired Outcomes

It is important to know the desired outcomes of the reskilling and upskilling initiative. For example, if the purpose of your workforce initiative is to align training with the agency mission and goals, the following determinations are needed.

- Determine the desired results of reskilling and upskilling.

  "What will success look like?"

  "In order to do what?" For example, we upskilled employees in X position to gain new skills to accomplish Y goal of Z.

  "So that you can do what?"

- Determine how the results will be measured or quantified.
- Determine if the result is reasonable to accomplish with allocated resources.
- Identify possible collateral and intangible benefits that may be obtained (i.e., increased employee engagement, reduced turnover).

Plan Take Away

Agency Leaders, Managers

- Host a planning meeting with key leaders to develop the Reskilling and Upskilling objectives and strategies and communication plan.
- Collectively identify agency strategic goals to determine what future initiatives, policies or programs will have a significant impact on human capital within your organization.
- Be the change management champion.

Supervisors

- Develop Reskilling and Upskilling Performance Goals.
- Develop employee performance plans, to make certain reskilling and upskilling goals cascade to the organization's strategic goals.
- Create the conditions for employees to improve their skills and performance.

Employees

- Understand how reskilling and upskilling is an opportunity to improve your skills and develop new skills.
- Understand how your work contributes to the mission.
- Determine your training requirements and development needs in order to develop an Individual Development Plan (IDP).

How to Get Employees Needed New Skills

Now that the Planning phase is complete, it is time to implement reskilling or upskilling. The Implementation phase involves the identification of strategies to close gaps, plans to implement the strategies, and measures for assessing strategic progress. It also involves communicating progress and strategies on a regular basis. The Implementation Model has four components: Define Focus, Implement, Measure, and Communicate.

Define Focus

Confirm goals, strategies, and policies.
➢ Identify the occupations with skills gaps
➢ Identify the occupations requiring reskilling or upskilling
➢ Identify the approach to reskilling or upskilling and closing skills gaps
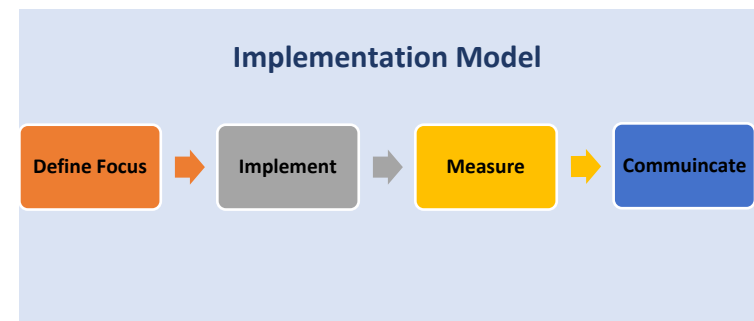➢ Create an action plan

Implementation Model

Define Focus → Implement → Measure → Communicate

Implement

Implement reskilling or upskilling strategies and policies in the agency using an action plan with a measurable timeline.

Measure

Measure and monitor agency's reskilling efforts using a timeline that shows progress against milestones. Evaluate and revise for continuous improvement, and make adjustments as necessary to address issues or corrections to change reskilling approach.

Communication

Communication is key to success. Communicate clear goals, progress, strategies, and engage with agency departments to ensure continuous and ongoing improvement on reskilling the workforce. Ensure a common change lanuguage is used to describe and discuss the program.

Example Reskilling and Upskilling Approaches

BLENDED TRAINING	Training that requires two or more methods of delivery, which must be completed in order to satisfy the educational requirements.
CAREER PATH	A progression of positions in one or more occupational series.
COACHING	Partnering with individuals in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.
DETAIL	A temporary assignment of an employee to a different position for a specified period, with the employee returning to his or her regular duties at the end of the assignment. A detail assignment implies that there is a vacant position available for the candidate to occupy which requires a Standard Form 52 preparation and submittal through proper channels.
MENTORING	A process that focuses specifically on providing guidance, direction, and career advice. It is usually a formal or informal relationship between two people – a senior mentor (usually outside the protégé's chain of supervision) and a junior protégé.
ON THE JOB TRAINING	Formal methods/activities planned and structured to promote learning by doing, e.g., detail assignments/programs.
ROTATIONAL ASSIGNMENT	Developmental assignment away from an employee's current position. During these assignments, individuals learn to adapt and successfully lead in a new position.
SHADOWING ASSIGNMENT	Observing a Federal leader in daily activities for a defined period of time. By watching leaders in action, the program participant gains exposure to leadership duties, responsibilities and approaches, and observes how concepts learned are applied in real-world situations.

Action Plan Example

This is an example of a completed action plan. A template can be found in Appendix B.

Reskilling/Upskilling Action Plan	
Reskilling/Upskilling Initiative: Electrical Engineers Increasing the number of Electrical Engineers at the Government Mechanical Office (GMO) by reskilling employees currently employed as General Engineers, Industrial Engineers, and Mechanical Engineers. The reskilling initiative will include career development for Electrical Technicians to transition to Electrical Engineers	**Date:** October 30, 2018
Describe the trigger for Reskilling and/or Upskilling? (Mandate, major change in workforce agency, employee need/desire, automation, etc.) What is the problem being addressed? GMO is downsizing its workforce from 7,000 to 3,000 employees due to a change in mission. To maintain productivity, GMO plans to cross train (reskill) all employees that work in mission critical occupations versus hire new employees.	
Describe the objectives and goals of the Reskilling/Upskilling initiative? 1. Reskill entire workforce to ensure adequate knowledge, skill, and ability to complete the agency's mission successfully. 2. Reskilling effort will cross train employees for two or more occupations in their career field. 3. Build a pipeline of qualified employees for leadership positions. 4. Establish a sustainable process for reskilling at GMO and include it in the agency's strategic plan for succession planning.	
Describe the barrier, problem, or deficiency being addressed: GMO's average workforce age is 50. The practice of performing more than one job at GMO is uncommon and often a task given to employees in the special pay category. GMO's goal is to close skill gaps in ALL of the STEM occupations by fiscal year 2021.	
Describe what is causing the barrier/problem (i.e., What is the root cause?): Most employees are reluctant to change and accept additional work assignments without an increase in pay and benefits. Managers fear the workforce reduction will leave GMO with employees who are near retirement or who lack the interest to learn a new occupation under reskilling.	
Define success or the desired outcome upon completion of Reskilling/Upskilling: GMO communicates to employees the change in organizational structure and job duties. The agency is able to reduce the workforce size from 7,000 to 3,000 using VERA/VSIP authorities, agency transfers, voluntary retirements, and resignations without any consideration of a reduction in force process. The 3,000 employees are successfully reskilled for one or more occupations in their career field over a multi-year process with the help of the HR department and GMO's training office. GMO successfully closes skill gaps in ALL STEM occupations.	

Primary Action Planning Team: Lead: Electrical Engineer Division Leaders, CLO, Training Officers
Members: CLO, Training Officers

Action Steps				
Actions to be Taken	**Key Deliverables/Output**	**Start Date/ End Date**	**Responsible Party (Parties)**	**Budget, Resources, and Approvals Needed**
Closing Skill Gaps for Electrical Engineers	Determine strategy Identify series that have gaps Determine number of positions which need more staff	Jan 2019- Sept 2023	CLO, Training Officers, Division Leads	None
Reskill Engineers in other series	List Engineering series Identify positive education requirement List coursework	Jan 2019- Sept 2023	CLO, Training Officers, Division Leads	None
Track Reskilling process	List of employees participating in Reskilling	Jan 2019- Sept 2023	CLO, Training Officers, Division Leads	None
Identify measurable metrics to assess reskilling effort	USE SMART metrics: specific, measurable, accurate, reliable and timely	Jan 2019- Sept 2023	CLO, Training Officers, Division Leads	None
Create reskilling curriculum, process	Determine process for retraining staff (course work, on the job-training, rotational assignments, mentoring)	Jan 2019- Sept 2023	CLO, Training Officers, Division Leads	Requires budget proposal and cost analysis
Assessment of proficiency in new occupation	Determine evaluation method: real-time	Jan 2019- Sept 2023	CLO, Training Officers, Division Leads	Requires budget proposal.
Create pipeline of qualified Engineers (2 or more disciplines)	Roster of Engineers with competencies in two or more disciplines	Jan 2019- Sept 2023	CLO, Division Leads	None

Implement Take Away

Agency Leaders/Managers

- Identify strategies and resources required to achieve the agency's reskilling and upskilling efforts.
- Engage key stakeholders (e.g., Chief Human Capital Officer, Chief Financial Officer, Chief Information Officer, etc.) to establish the necessary governance structure for implementation.
- Draft processes and procedures to drive corporate philosophy and methodology for conducting reskilling and upskilling.

Supervisors

- Continually communicate. Supervisory communication with employees is essential to clear performance expectations and results.
- Continuously monitor progress while taking corrective action as needed.
- Determine the necessary performance milestones and measures to track progress toward the completion of office goals.

Employees

- Ensure you have thorough understanding of how your performance goals will be monitored and assessed.
- Take the initiative to complete elements outlined within your IDP.
- With your supervisor, develop a robust set of milestones and outcome measures to track progress toward completion of the goals you have established.

Were the Objectives Met?

Evaluation is an important step in all training programs. It begins at the design phase and continues beyond implementation. To assess the effectiveness of training and the impact on an employee's development for reskilling or closing a skill gap, evaluation must occur to gauge the impact and show measurable results.

Evaluation data enables judgments about the following questions:

- • How well did the training meet the development needs identified?

- • How well did the learners master the training content?

- • How well did the learning transfer to the work setting?

- • How well did the training contribute to the achievement of the agency's mission?

Training and development are tools that help increase workforce knowledge and ability in specific areas and lead to improvement in individual and organizational performance. An effective way to evaluate training is use of a logic model (see Appendix C). It provides a systematic approach to evaluation. Kirkpatrick's Four Level Training and Evaluation Model is just one of several available evaluation tools.

More information on Training Evaluation is available in OPM's Training Evaluation Field Guide and on OPM's Training and Development Policy Wiki at https://www.opm.gov/WIKI/training/Training-Evaluation.ashx.

Evaluate Take Away

Agency Leaders/Managers

- Hold senior management accountable for organizational and individual progress and performance.
- Utilize all appropriate data and results of the reskilling and upskilling initiative to make organizational decisions, and monitor and/or adjust strategy and goals based on Agency's organizational performance.

Supervisors

- Hold supervisors accountable for individual progress and performance.
- Capture data and results of reskilling and upskilling and use it to drive future planning and decisions.

Employees

- Track your own accomplishments throughout your reskilling or upskilling training.
- Regularly discuss with your supervisor any adjustments to your reskilling or upskilling performance plan.

Related Articles/Studies/Whitepapers:

- "A Guide to Upskilling America's Frontline Workers," Deloitte and The Aspen Institute
- "AI Could Mean Massive Reskilling Initiatives for the Federal Workforce," Fedscoop (2018)
- Idea Report, "Growth Mindset Culture, NeuroLeadership Institute (2018)
- "How much time and money can AI save government?" Deloitte Center for Government Insights
- "Towards a Reskilling Revolution: A Future of Jobs for All," World Economic Forum (2018)
- "Trends Affecting Government and Society," U.S. Government Accountability Office (2018)
- "Upskilling and Reskilling: Turning Disruption and Change Into New Capabilities," ATD Research (2018)
- "What the Future of Work Will Mean for Jobs, Skills, and Wages: Jobs Lost, Jobs Gained," McKinsey & Company (2017)

Federal Resources:

- 5 CFR part 250, subpart B – Strategic Human Capital Management:
- 5 CFR part 410 –Training and 5 U.S.C. chapter 41- Training
- Federal Academic Alliances
- Federal Employee Viewpoint Survey
- Federal Employment Statistics
- Federal Strategy and Performance
- Federal Workforce Priorities Report
- Human Capital Framework
- Merit System Principles
- MOSAIC Competencies
- OPM Federal Training and Development Wiki
- OPM's Workforce Planning Model
- President's Management Agenda
- Unlocking Federal Talent
- USAJobs

APPENDIX A: PLANNING TOOLS

THE HUMAN CAPITAL FRAMEWORK DIAGNOSTIC TOOL

The Human Capital Framework (HCF) Diagnostic Tool is an assessment designed to help determine your agency's relative strentghts and weaknesses in strategic human captial mangement. The tool is organized around HCF focus areas. Focus areas are key elements to consider when designing and implementing the four HCF systems (Strategic Planning and Alignment, Performance Culture, Talent Management and Evaluation). Additional information on this tool is at HTTPS://WWW.OPM.GOV/POLICY-DATA-OVERSIGHT/HUMAN-CAPITAL-MANAGEMENT/HUMAN-CAPITAL-FRAMEWORK-ASSESSMENT/SHARED/DIAGNOSTIC_TOOL.HTML.

TRANSFORMATION IQ

If you need help aligning workforce to mission requirements, OPM offers a reshaping service that considers business need, employee interest and qualifications.

OPM HR Solutions' *Transformation IQ* service adds rigor, transparency and employee engagement to agencies' workforce reshaping and restructuring efforts. OPM's transformation experts provide a framework, process and tools to place current employees into a new organizational structure. The service includes a streamlined process, online multi-part assessment strategy, OPM-evaluated qualifications, OPM-delivered talent distribution and placement recommendations into the future-state organization chart, and OPM-facilitated sessions with executive leadership to finalize all placements.

Transformation IQ includes customizable, multi-faceted assessments leveraging both USA Staffing™ and USA Hire™ to integrate and assess:

- Critical competencies for employees (supervisory and non-supervisory)
- Minimum qualifications
- For supervisors, their situational judgment capabilities (assessed online via OPM's USA Hire™ platform, and integrated into the process)
- Organizational interest (where people want to work) and occupational interest (what jobs they want to do)

For more information, please contact HRStrategy@opm.gov**.**

INDIVIDUAL DEVELOPMENT PLAN (IDP)

An individual development plan (IDP) is a tool to assist employees in career and personal development. Its primary purpose is to help employees reach short and long-term career goals, as well as improve current job performance. An IDP is <u>not</u> a performance evaluation tool or a one-time activity. It should be looked at like a partnership between the employee and the supervisor. It involves preparation and continuous feedback. Many agencies require IDPs for new and current employees. It is encouraged throughout many organizations. Many Federal agencies require their employees to complete an IDP, annually. All Senior Executives are required to have an Executive Development Plan (EDP) (5 CFR 412.401).

Additional information on IDPs is on OPM's Training & Development Policy Wiki at https://www.opm.gov/WIKI/training/Individual-Development-Plans.ashx.

Appendix B: Implementation Tools

Reskilling/Upskilling Action Plan Template				
Reskilling/Upskilling Initiative:			**Date:**	
Describe the driver for reskilling and/or upskilling? (Mandate, major change in workforce agency, employee need/desire, automation, etc.) What is the problem being addressed?				
Describe the objectives and goals of the Reskilling/Upskilling Initiative?				
Describe the barriers to the Reskilling/Upskilling Initiative and the cause of them?				
Describe what is causing the barrier/problem (i.e. What is the root cause?)				
Define success or the desired outcome upon completion of Reskilling/Upskilling				

Primary Action Planning Team
 	
  Lead:
 	
  Members:				

Action Steps				
Actions to be Taken	**Key Deliverables/Output**	**Start Date/ End Date**	**Responsible Party (Parties)**	**Budget, Resources, and Approvals Needed**

MEASURING RESULTS CHART

TALENT MANAGEMENT RESKILLING/UPSKILLING FOCUS
The Measuring Results Chart contains sample metrics to consider for evaluation and to achieve results.

FOCUS AREA	STRATEGIC METRICS	OPERATIONAL METRICS	EMPLOYEE METRICS
WORKFORCE PLANNING	Mission-Critical Occupation (MCO) resource targets are met	Percent of managers involved in the workforce planning process (manager satisfaction survey)	Percent of MCO staffing gaps closed
RECRUITMENT AND OUTREACH	Competency and skills gaps are closed for MCOs	Applicant satisfaction with the hiring process Percent of reduction in time-to-hire Manager satisfaction with quality of applicants	Percent of managers satisfied with the quality of applicants Percent of applicants satisfied with the application process
EMPLOYEE DEVELOPMENT	Organizational survey	Employee training Employee mentoring Employee coaching	Percent of employees who participate in training Percent of employees who participate in agency mentor or coaching programs
LEADERSHIP DEVELOPMENT	Competency and skills gaps filled for Management and Leadership positions	Leadership ongoing training Leadership mentoring	Percent of staffing gaps closed for leadership positions
RETENTION	Retention percentage of employees in MCOs	Manager satisfaction with quality of hires after 1 year Increase in employee engagement on the Federal Employee Viewpoint Survey	Percent of managers satisfied with the quality of hire Percent of new hire overall satisfaction

KNOWLEDGE MANAGEMENT	Establishing a business case for change Focus on agency mission, vision, strategic goals (short and long term)	How has "managed knowledge" contributed to the organization's desired outcomes? Have any new knowledge gaps emerged based on new requirements?	Building and maintaining trust Transfer of knowledge Succession Planning Pipeline of qualified employees
CHANGE MANAGEMENT	Action Plan Task Responsibility Matrix Risk Assessment Stakeholder Analysis	Establishing a Change Management Structure Clarifying Stakeholder requirements and expectations	Guidelines for Communicating Change
CONTINUOUS IMPROVEMENT	Phase/Stage End Assessment Report	Post –Implementation Review Evaluation Planning	Action learning team Data collection methods Gap analysis

Appendix C: Evaluation Tools

EVALUATION LOGIC MODEL

- Logic Model.docx

CAREER RESOURCE CENTERS

- Department of Housing & Urban Development (HUD): HUD LEARN Career Resource Center - https://www.hudlearn.net/

More agency promising practices coming soon