

Client Redacted
Training Needs Assessment – Data Collection Plan

Document Change Log

The table below tracks the Training Needs Assessment Data Collection Plan's version history.

Version No.	Date	Author	Revision Description
Initial Draft	May 13, 2021	Carr Instructional Design	Initial draft and submission to

Document Review History

The table below tracks the Training Needs Assessment Data Collection Plan's review history.

Version No.	Date	Reviewer	Comments
Initial Draft			

Deliverable Approval Authorization

CONTRACTING OFFICE REPRESENTATIVE (COR) CERTIFICATION - Please check the appropriate statement.

_____The deliverable is accepted.

_____The deliverable is accepted pending the changes noted.

_____The deliverable is not accepted.

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EXECUTIVE SUMMARY

This plan describes the data collection methodology and strategy for the sustainment of the Financial Systems Modernization Solution training. This plan documents what and how extant data is being used, as well as how subject-matter experts (SMEs) and accomplished performers (APs) will be identified and leveraged, outlines the general approach to virtual and in-person site visits, scheduling, and milestones. The data collection methodology in this plan is completed to adequately assess the training needs and activities for the implementation and sustainment of the Oracle E-business Suite.

The Training Needs Assessment (TNA) Toolkit, which supplements this document, maps the activities and the collected data to the program owners and SOFTWARE APPLICATION end-users. This toolkit is a comprehensive list of the activities and the data to be collected from the Site Readiness Assessment, Training Delivery Evaluations (Kirkpatrick Level 1), Performance Assessments (Level 2), Sustainment (Level 3), and Business Needs/Requirements (Level 4).

Several documents will succeed this plan:

1. *Performance Requirements for SOFTWARE APPLICATION End-Users*. This workbook outlines performance requirements for each SOFTWARE APPLICATION role and relevant modules, courses, and other information. We will use the data to recommend, forecast, and inform decisions for training and ongoing support after the Go-Live event. The performance requirements for the End-User community will inform the crosswalk mapping for their present use of like software application, i.e., for requisitioning and contract management, to the use of Oracle R12.
2. *SOFTWARE APPLICATION Gap Analysis*. This analysis will identify gaps between the implementation training and the sustainment training. The analysis includes Excel tables that outline the focus areas, desired future state, identified gaps, and action forward plan. Also, the analysis will include identifying future trends used industry-wide and how these fit 's past, present, and current outlook (software). The plan will also examine the impacts of Oracle patching and application updates. The gaps analysis details 's areas of consideration and decision to address learning and earlier adoption for the end-user community.
3. *SOFTWARE APPLICATION Training Needs Summary Report (Training Options Assessment)*. The previous three products will inform this document. It will lay out the current state and a detailed list of training options for performance gaps compared with organizational goals and priorities to develop recommendations for current, transition, and future training solutions.
4. *SOFTWARE APPLICATION Sustainment Training Program (Training Needs Report)*. This plan includes two products:
 - a. *An interim report*, which will include site readiness evaluations relying on Level 1 evaluations after the implementation training will be essential towards developing the Sustainment Training Plan).
 - b. After Go-Live, *a final report* that uses the Level 2, 3, and 4 data to be collected after the system is in use.

INTRODUCTION

The Client is unique in its multi-mission service, combined with its diverse, globalized workforce. In addition, the organization has a decentralized approach, where much responsibility is placed on even the most junior personnel. This ensures they can provide quick responses and be adaptable in a broad range of situations.

However, the Client requires a highly customized solution for its financial management and acquisition system because of these unique characteristics.

This transition will directly impact approximately 16,000 personnel. It will require training on the newly implemented Oracle R12 eBusiness Suite of applications. Branded SOFTWARE APPLICATION through a variety of methods, including but not limited to instructor-led training (ILT) to include both classroom and webinar, web-based training (WBT) to include Oracle's User Productivity Kit (UPKs), and various job aids.

The FSM Program effort is being implemented by several vendors working in collaboration with the Client.

COMMUNICATION PLAN AND ORGANIZATIONAL CHANGE MANAGEMENT (OCM)

Our communication approach for this effort is to collaborate closely with the iTeam, as the central hub for communications in collecting the data within. Outreach and communication with the end-user community will be solicited by working with the iTeam in the most appropriate way to collect data from surveys to prevent survey fatigue and how to receive completion of the site assessment checklists.

The change management methodology used by 's iTeam for this project is the ADKAR Change Management Model, which is centered on Awareness, Desire, Knowledge, Ability, and Reinforcement. The figure below depicts the various stages of an ADKAR model. The iTeam has been working at the level of Awareness and Desire, and the style of communication for data collection will build from Knowledge to Reinforcement in order to engage, prepare and equip to monitor and sustain the 16,000 users in use of SOFTWARE APPLICATION.

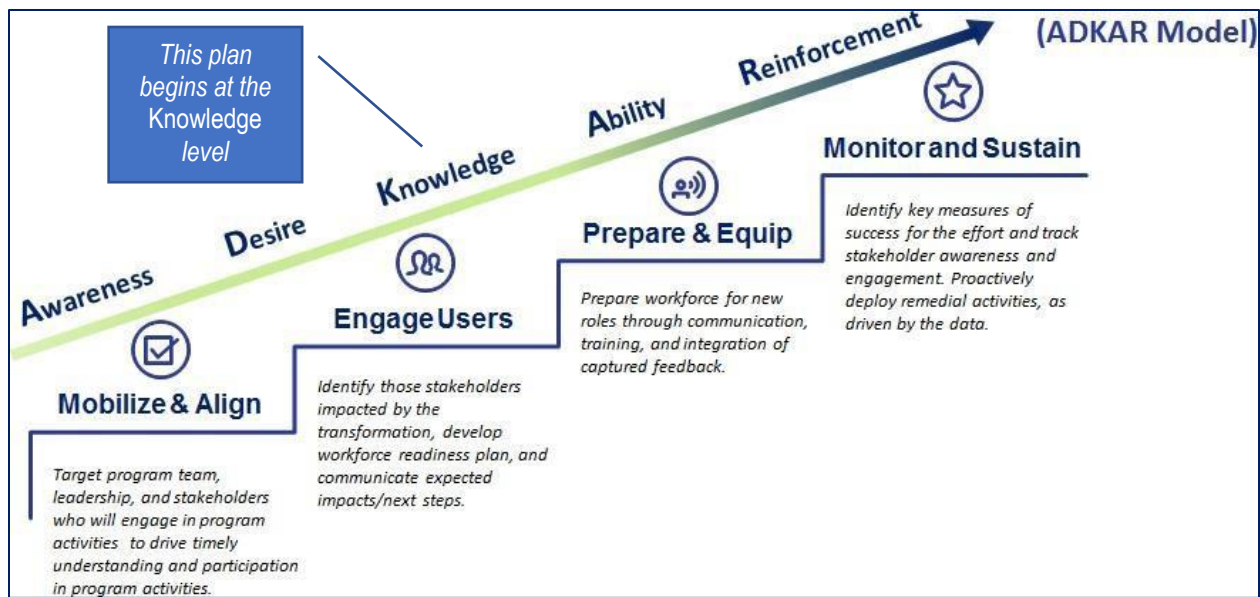


Figure 1: ADKAR Change Management Model

DATA COLLECTION METHODOLOGY

The plan will encompass a survey of all users by site location, accounting for 's nine districts and 38 bases in the continental United States and will glean information via email communications from the site and regional commands. Accomplished Performers (AP) and their inclusion in the human performance model is critical because it means analysts can observe and interview the 'best of the best' currently doing the job.

The Change Champion Network provided by the Client will identify a broad cross-section of end-users. This ongoing effort to perform data transformation into actionable plans to address future sustainment and SOFTWARE APPLICATION role-based support activities. Before full implementation, a pilot site will be selected in consultation with the Client to validate this data collection methodology. Using data and feedback from this pilot, we will refine our methodology to generate an in-depth, multi-faceted understanding of a complex issue in its real-life context.

The data collection methodology for this project will center on quantitative methods, analyzing sources such as training evaluations, course survey results, iTeam readiness feedback surveys, data from the iTeam/Organizational Change Management group, SOFTWARE APPLICATION performance data and help desk ticket data from Go-Live. This information will be compared, if appropriate, with data derived from previous DHS Trio implementations.

This quantitative information will be supplemented by qualitative research, from sources listed below, to provide a fuller picture of how to best optimize its training delivery and system support for all the 16,000+ users, addressing factors such as job title, role, and location. By inductively developing and deductively approaching the data points, we will observe from a broad to a specific level of all information collected.

We will use helpful categorization to separate qualitative methods into five groups: ethnography, narrative, phenomenological, grounded theory, and case study.

- **Ethnography:** This would include virtual site visits, survey data, and system roles and responsibilities to assemble data for the gap analysis and training needs analysis. The analysis from this data can produce findings, for example, the areas requiring additional workshop sessions or brown bag sessions that emphasize the new functionality of SOFTWARE APPLICATION. One area highlighted could be locating the myriad of inquiry pages.
- **Narrative:** Information gathered from the end-user community gleaned for training evaluations and the Change Champions, FLO trainer network. Functional Subject Matter Experts (SMEs) As Client develops an array of power users with high system proficiency. Developing user personas from this group will aid in creating a group of accomplished performers.
- **Phenomenological:** Understanding the end-user communities' adoption of the SOFTWARE APPLICATION system and its effects on their work-life as the system and community move the state of normalizing.
- **Grounded theory** is the construction of training recommendations, feedback approaches through the collecting and analyzing data.

Information will be derived from several methods:

- **Interviews** conducted with Training SMEs, potential APs, and Training Officers at Site locations and virtually.
- **Surveys:** iTeam OCM Survey, Change Champion Network, IBM JPMO Training Sessions Evaluations.
- **Group discussion** at post Go-Live Workshops, FLO network feedback from training sessions, and other opportunities.
- **Observation:** Help desk ticket metrics by application modules and ticket types.

Training Needs Evaluation

The Kirkpatrick Model is not the only model available, but it is well-suited to training evaluation needs because the methodology uses Terminal Performance Objectives (TPO) as a measure for learning. If performance intervention is developed well and based on an accurate analysis, learning will occur. Additionally, If the learner can perform the new skill on the job, chances are that it will have a positive impact on the organization as highlighted in the Standard Operating Procedures (SOP) For the 's Training System.

For this TNA, the New World Kirkpatrick Model will be used as the model for evaluations, which includes:

- **Level 1 Reaction Evaluation:** Captures the degree to which the student reacts favorably to the training event. This would be done before system go-live.
- **Level 2 Learning Evaluation:** Assesses the degree to which the student demonstrates mastery of TPOs in the training environment.

- **Level 3 Behavior Evaluation:** Measures the degree to which the intervention impacts actual on-the-job performance.
- **Level 4 Results Evaluation:** The degree to which the targeted outcomes are accomplished because of the learning event(s) and subsequent reinforcement. These outcomes will contribute to the organization meeting its purpose and mission.

EXTANT DATA

Extant data will be collected for this sustainment training analysis including FMSII project's vision, mission, and strategic plan, Procurement and acquisition SOPs, doctrine, Tactics, Techniques, and Procedures (TTP) from SOFTWARE APPLICATION training and system documentation and application. Extant data will be used to provide access to operational and management data for SOFTWARE APPLICATION future training, support and sustainment. In addition to translating and documenting current SOFTWARE APPLICATION performance to a desired state. Artifacts for analysis will consist of feedback from:

- Site Surveys
- Site Training Staff and Leadership Rotation Schedule
- Survey results from R3 and iTeam
- Analysis of Helpdesk Statistical Data from ACCOUNTING
- Industry recommendation from Oracle Application Implementation Group for Support Activities
- Codified review of Lessons Learned from previous Trio implementations, IBM training activities, helpdesk data metrics, functional and business SMEs, the Change Champion Network and Field Liaison Officer (FLO) feedback from training sessions.

Artifacts & Metrics Collection and Data Disbursement

Notional Artifact/Metric	Description
TNA Pilot District and Sites	A listing for the sites and regions for virtual site visits
Site Readiness Assessment Toolkit	Surveys and data collection documents
Change Champion Network (CCN) POC	Early Adopters that evangelize ease of use and benefits of SOFTWARE APPLICATION
Outreach and Communication Plan	Action Plan for outreach and communication
Training POC per Site	base training officers
Supervisors and Managers	Storekeeper Management team at each site
Level One Evaluations	Readiness and Reaction evaluations prior to SOFTWARE APPLICATION Training

Notional Artifact/Metric	Description
SOFTWARE APPLICATION User Roles and Procurement Responsibilities at each site	Matrix of Oracle R12 System roles
SOFTWARE APPLICATION Training Courses and Modality	Listing of SOFTWARE APPLICATION Course by site and training locations
SOFTWARE APPLICATION Sandbox Access and User Provisioning	Policy and procedure for access to production SOFTWARE APPLICATION Oracle R12 and SOFTWARE APPLICATION iTrain instance database for demonstration and training of functionality.
SOFTWARE APPLICATION Training schedule	SOFTWARE APPLICATION training conducted by roles
Level Two Evaluations	Learning evaluations to demonstrates mastery of TPOs. Survey materials and feedback from each training class on its delivery, content, and learning evaluation.
SOFTWARE APPLICATION “Go Live” Schedule	Determine data collection based on performance
Level Three Evaluations	Behavior evaluation to measure the degree of actual on-the-job performance and action plan
SOFTWARE APPLICATION Training Locations and Site Logistics	SOFTWARE APPLICATION access and connectivity, and training logistics to conduct implementation and sustainment training.
Level Four Evaluation	These outcomes will contribute to the organization meeting its purpose and mission.

Lessons learned from prior Oracle R12 implementations will be considered, but not relied upon, due to differences the implementation environments. These differences include:

- **System Differences.** The systems are similar; however, the delivered application in some modules will be utilized differently. This is using a Miscellaneous Requisition to meet its requirement for MILSTRIP. Business process rules for may defer in receiving purchased goods and services.
- **Scope of implementation.** The size of implementation at (16,000 users) is much broader than (1,500-user community accessing most of the Oracle R12 Suite) and (250-user community). The scope is significant because while the user community is quite large, most users will access two SOFTWARE APPLICATION (2) modules: iProcurement (iPro) and Contract Lifecycle Management (CLM). For example, ACCOUNTING will process most of ’s financial transactions.

- **Composition of the workforce.** As the force participants in pre-training and completes their roles-based training, we aim to survey their experiences. Also, we will closely monitor helpdesk ticket ques for trending data, trainer feedback, and Change Champion inputs.

However, for situational awareness, we have documented lessons learned from those implementations from the lens of how they might apply to.

SITE VISITS

Given the current operational environment and limitations from COVID, we will attempt to conduct both virtual and possible in-person site visits for larger units to gather data. The site assessment checklist will be utilized as part of training readiness and submitted to the iTeam for distribution to a -determined method for collecting the needed data from the SMEs and APs.

These interviews and visits are an effective way to understand better the qualitative data collected for other component evaluation and SOFTWARE APPLICATION sustainment. For the TNA and evaluation to be beneficial, we must understand by site the users and their roles and responsibilities that will be trained on SOFTWARE APPLICATION. We can achieve this through direct interaction and (virtual) observation of a site and its present process in procurement activities.

This type of data collection allows a snapshot of the present to the future state of the programs in its varied locations. These visits also enhance our understanding of possible logistics behind requisitioning and purchasing activities and how they could vary by site, including personnel needs and interests.

Site visits also serve as an opportunity to identify and recognize unforeseen or unintended outcomes, both positive and negative. Often particular aspects of Oracle R12 Financial implementations may need business process workarounds or process improvements. These changes occur outside of the SOFTWARE APPLICATION and an understanding of base, command, or site procurement activities is helpful.

SCHEDULE AND MILESTONES

The schedule for data gathering is present and ongoing, concluding after SOFTWARE APPLICATION Go-Live training and support is completed. The table lists milestones based on the TNA Checklist (toolkit).

The metrics will be gathered at time intervals following the key activities listed. The goal is to gather data points within the Kirkpatrick Levels one to four evaluations from at least 10% for the user community per site or unit. The data gathering activities will inform our data points, highlighting trends, issues, and variances in users' acclimation to the new system and business processes. The capture of this metric will inform decision-makers and senior leadership exactly how SOFTWARE APPLICATION is being received and mastered by its user community as the system normalizes at.

Training Needs Assessment and Gap Analysis Schedule of Activities

Key Activities	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan 22	Feb	March	April	May	June
OCM Readiness Assessment														
Level 1 Reaction Survey		iPro							CLM					
SOFTWARE APPLICATION iProcurement Training														
Level 2 TPO Learning Evaluation				iPro		iPro					CLM			
SOFTWARE APPLICATION “Go-Live”							SOFTWARE APPLICATION “Go Live and Support”							
SOFTWARE APPLICATION CLM Training										TBD				
Level 3 Behavior Evaluation								iPro				CLM		
Level 4 Outcomes					Interim Report					Gap Analysis and SOFTWARE APPLICATION Sustainment Plan				

SUMMARY AND RECOMMENDATIONS

We believe that this information will inform sustainment training. The efforts and activities from the totality of data to be collected will be analyzed and added to the training and GAP analysis documents as appropriate.

The conclusion is intended to aid Client in understanding how this data can inform future training and support efforts in using SOFTWARE APPLICATION. This effort is not merely a summary of data points or a re-statement of known information but a synthesis of critical points producing actionable steps for moving 's training efforts from Go-live to Sustainment to formalized SOFTWARE APPLICATION Training Program.