



# IT STAFF DEVELOPMENT GUIDELINE

January 2006

Aspiring for Excellence thru Learning & Collective Intelligence

# IT Staff Development Guideline

---

## Table of Contents

<b>INTRODUCTION</b> .....	1
<b>PURPOSE</b> .....	1
<b>ABOUT STAFF DEVELOPMENT</b> .....	2
<b>ABOUT BLENDED LEARNING</b> .....	2
<b>IT STAFF DEVELOPMENT AND LEARNING APPROACH</b> .....	2
Offline and Online (formal learning).....	3
Self-Paced and Live, Collaborative (informal learning).....	3
Unstructured Learning .....	3
Work and Learning.....	3
<b>KEY DEVELOPMENT AREAS</b> .....	3
<b>PRIORITIES FOR FY-06, FY-07 &amp; FY-08</b> .....	4
Technical Skills.....	4
Soft Skills.....	4
<b>ROLES AND RESPONSIBILITIES FOR STAFF DEVELOPMENT</b> .....	5
VP of Technology/CIO.....	5
Senior Directors .....	5
Managers .....	5
Individuals.....	6
Cross Functional Team.....	6
<b>APPENDIX - I</b> .....	7
ALMIS # 5882 .....	7

## INTRODUCTION

HQ IT supports computing needs of over 700 CARE USA employees and Country Offices' IT Managers in more than 60 locations worldwide. HQ IT sources, designs, develops, implements, and maintains the hardware, software, and IT solutions that enable CARE to run effectively. Currently CARE's global computing environment is quite complex and full of challenges. Simultaneously fast changing technology industry forces CARE in creating a dynamic environment to migrate from its current state to the new platform globally.

The adoption of new technologies, increased business demands, the rapid obsolescence of knowledge, the need for just-in-time learning and the search for cost-effective ways to meet the learning needs of a global workforce have led us to create a learning and development environment capable of adjusting to these changes.

Given those significant demanding environment and growing skill gaps in organization and demographic changes, new learning model is needed. To create a true learning department we will move beyond the formal learning and development interventions found in the typical classroom based learning delivery model. More attention must be given to a broad scope of initiatives that support performance improvements of IT, including talent development, the usage of technology based learning, workplace learning, coaching and mentoring.

Key is to create a supportive and dynamic culture that invites continuous learning and transforming learning into knowledge.

We will initiate to develop new skills and enhance staff learning opportunities so that IT staff can easily find the quality learning and knowledge they need to be the best at their work. Additionally, in identifying training and/or learning opportunity, it is important to take into account both the needs of the individual and the needs of the organization.

## PURPOSE

CARE's HR division has already defined competencies required by each job Grade.

The main purposes of this document are to:

- Define "Staff Development" and Blended Learning" to have common understanding among IT staff
- Define a staff development approach, which fosters IT to become a learning department and IT staff understand the reasons for multifaceted approaches.
- Highlight key development priorities for IT staff over the next three years and identify a framework for its implementation. This will act as a conduit to discussions and subsequent decisions about the best use of existing resources in the broad areas of work across IT's functional units
- Define a review process in relation to its currency, emerging priorities and also the evaluation of its implementation

### **ABOUT STAFF DEVELOPMENT**

According to CARE's Career Development Philosophy (ALMIS#5882, 28<sup>th</sup> October 2005), "Staff development is the training, development, and support that the organization provides to employees to focus their work on organizational objectives and ensure that the employee has the competencies to be successful in one's current job or assignment in the organization. In effect, it is focused on increasing individual capability in order to expand and enhance the organization's capacity to achieve its goals."

Staff development activities shouldn't be mixed with career development, though career development has often been used interchangeably with staff development. The copy of the aforesaid ALMIS is attached as appendix, which will provide more information on career development.

### **ABOUT BLENDED LEARNING**

Options for blended learning go beyond the classroom. They're formal and informal, technology- and people-based, independent and convivial, and directive- and discovery-oriented. Blending involves a planned combination of approaches, such as coaching by a supervisor; participation in an online class; breakfast with colleagues; competency descriptions; reading on the beach; reference to a manual; collegial relationships; and participation in seminars, workshops, and online communities.

Blended learning focuses on optimizing achievement of learning objectives by applying the "right" learning methodologies to match the "right" personal learning style to transfer the "right" skills to the "right" person at the "right" time.

Embedded in the above definition are the following principles:

- We are focusing on the learning objective rather than the method of delivery
- Many different personal learning styles need to be supported to reach broad audiences
- Each of us brings different knowledge into the learning experience
- In many cases, the most effective learning approach is "just-what-we-need, just-in-time"

The experience of pioneers in blended learning shows that putting these principles into practice can result in radical improvements in the effectiveness, reach and cost-effectiveness of learning programs relative to traditional approaches. These improvements are so profound that they have the potential to drastically change the overall efficiency and effectiveness of IT department.

### **IT STAFF DEVELOPMENT AND LEARNING APPROACH**

Staff development and learning is a journey rather than a destination. While there is no simple, one-size-fits-all model in staff development approach, there are some fundamental shifts IT department must be prepared to make. The first steps along the journey are to build experience with the individual foundations of any development and learning approach. A technical learning environment will be established within IT to foster learning skills where IT Staff will be able to proactively seek information, subscribe to free /paid technical resources, and participate in leveraging learning across the department through participation in learning exercises.

## IT Staff Development Guideline

---

The overall approach is more of a “Blended Learning”. The original use of the phrase “Blended Learning” was often associated with simply linking traditional classroom training to eLearning activities. However, the term has evolved to encompass a much richer set of learning strategy “dimensions.”

This approach supports not only the more traditional forms of development and learning such as instructor-led training, seminars, conferences, e-learning and workshops, but also allows more progressive forms of development such as mentoring, work shadowing, individual advice sessions, secondments and self directed learning, research-based and information availability based learning. As such this will establish the concept of continuous professional development.

IT’s blended learning approach may combine one or more of the following learning categories/dimensions, although many of these have over-lapping attributes.

1. **Offline and Online (formal learning)** - At the simplest level, a blended learning experience combines offline and online forms of learning where the online learning usually means “over the Internet or intranet,” and offline learning happens in a more traditional training. Some of the developments and learning take place through Instructor-led Classrooms, Hands-on Labs & Workshops, visits to similar organizations’ IT department, eMeetings, Virtual Classrooms, Web Seminars and Broadcasts, and Coaching
2. **Self-Paced and Live, Collaborative (informal learning)** - Self-paced learning implies solitary, on-demand learning at a pace that is managed or controlled by the learner. Collaborative learning on the other hand implies a more dynamic communication among many learners that brings about knowledge sharing. Some of the examples could be learning through documents & web pages, group discussions, web/computer-based training, reading magazines, recorded live events, online learning communities, discussion forums, attending brown-bags and knowledge sharing
3. **Unstructured Learning** - Not all forms of learning imply a pre-meditated, structured or formal learning program with organized contents. Most of the unstructured learning takes place through meetings, discussions, e-mail, reading magazines and networking with other organizations’ IT department.
4. **Work and Learning** - Ultimately, the true success and effectiveness of learning in IT department is believed to be associated with the paradigm where work (such as architecture designing and implementing) and learning are inseparable, and where learning is embedded in regular business processes and practices. Work becomes a source of critical learning content that can be shared with others.

### KEY DEVELOPMENT AREAS

To provide efficient and effective global support services and to achieve operational excellence it’s necessary for IT department to focus on both technical and soft skill development for its staff.

Technical skills are most appropriate for Subject Matter Performers whose jobs are to deliver best results in their corresponding areas of responsibilities and to become Subject Matter Experts. The primary backup staff for each technical area is also expected to have good understanding and knowledge for their areas of responsibilities. The training/courses need to be identified based on the available skills v/s required level of expertise of the responsible staff.

## IT Staff Development Guideline

---

Soft skills are more of team requirements. Team dynamics and learning are powerful and can create great results and satisfaction. Though sometimes cross-training can be a viable alternative, but to be truly effective, total department training is better. A good place to start is with managers and groups that perform the same types of tasks, which impacts larger constituents. Common courses/training should be functionally and collectively designed and organized to achieve IT's overall performance improvements.

### PRIORITIES FOR FY-06, FY-07 & FY-08

Achieving a set of competencies should work in conjunction with the alignment of individual performance objectives and the business goals of IT department. IT's primary focus should be on job performance, not just training for the sake of training.

The following development priorities are identified based on IT's emerging role of providing global leadership and also based on required key skills that can yield tangible business impact. Additionally current steps of building IT's global support portfolio are also taken into account.

#### Technical Skills

1. Business Analysis/Project Management – Collecting, analyzing and documenting business requirements, conceptualizing and managing projects, identifying new solutions, business & technology integration, managing business expectation and managing change
2. Application Management – Architecture, administration, monitoring, optimization, report writing and programming
3. Database Management - Architecture, modeling, administration, consolidation, monitoring, trend analysis and optimization
4. Infrastructure Management – Architecture, modeling, administration, implementing, consolidation, monitoring, utilization and performance analysis and optimization for Systems, Hardware, Software, Network, Email, E-Fax, connectivity and telecommunication
5. IT Security Management – Architecture, modeling, administration, implementing, optimization, monitoring and performance analysis
6. Technology Training – Delivery methodologies, developing contents and training presentation

#### Soft Skills

1. Team Building  
**Critical Thinking:** *Problem Inventory, Problem Solving, Decision Making, Planning etc.*
2. Written Communications  
**Technical Writing:** *Mastering the Art of Technical Writing*  
**Business Writing:** *Business Writing & Grammar Skills Made Easy and Fun*
3. **Customer Service:** *The Essentials of Excellent Customer Service*
4. **Time Management/Work Management:** *Managing Multiple Priorities, Managing to Project Deliverable Schedules, Work Overload Managing Stress*
5. **Emotional Intelligence:** *Self-awareness, Self-motivation, Managing Relationships, Empathy, Mood Management*
6. **Leadership Development:** *Concepts, Leadership Models, People Management, Managing Performance, Strategic Decision Making, Communication, Motivation, Teamwork etc.*
7. **Interviewing skills:** *How to Interview, Behavioral Interviews, Tips, Questions, Etiquette*
8. **Consulting:** *Tips and practical methodologies for internal consulting*
9. **Presentation:** *Art of creating presentation, communication during presentation and delivering*
10. **Language:** *Spanish and French*

### ROLES AND RESPONSIBILITIES FOR STAFF DEVELOPMENT

Staff development is an integral part of IT's strategic planning process. IT recognizes that operational excellence and efficient service delivery can only be achieved and maintained by appropriately skilled, experienced and motivated staff. Responsibility for staff development occurs at four levels:

**1. VP of Technology/CIO** – Primarily responsible to ensure appropriate and timely implementation of staff development and learning approach through following activities:

- a) Ensure in establishing a learning culture within IT to foster staff development and learning
- b) Provide budgetary/funding support for staff development
- c) Hold Sr. Directors accountable for staff development of their direct reports
- d) Provide inputs, review and approve the list of required common soft skills for all IT staff and the targeted fiscal year for implementation

**2. Senior Directors** - Primarily responsible to implement staff development and learning approach for direct reports and to ensure its appropriate implementation within functional teams and IT. The key activities are:

- a) Communicate clear vision linking IT's global leadership role with staff development and learning options
- b) Review job-types and in partnership with in-line managers develop, review and refine required skills for each job-type, aligning with current and future IT direction and job descriptions
- c) Review staff development plans with direct reports beginning and mid-year to call-out staff development objectives with measurable results
- d) Ensure staff development plans are embedded with IOP, mid-year review and APA and hold managers accountable for staff development plan and its implementation for their direct reports
- e) Provide guidance and recommendations to identify 3-5 soft skills required by IT all staff in achieving operational excellence and efficient service delivery
- f) Identify staff members to organize soft skills training for IT all staff and vendor schedules
- g) Monitor and review IT's overall spending on staff development activities.

**3. Managers** – The primary responsibility for implementing staff development and learning approach within their team. All of these IT leaders are required to ensure that staff is provided with the necessary opportunities for their development and learning. Some of the key activities are:

- a) Communicate clear links between development and learning options. Identify staff development needs for each direct report and for the entire functional team under his/her supervision
- b) Embed staff development plans with IOP, mid-year review and APA
- c) Implement staff development plans within their areas of responsibility and within the allocated budget
- d) Manage the release of direct reports to participate in approved all IT staff development activities
- e) Encourage performance improvement by providing formal and informal feedback on performance
- f) Ensure usage of appropriate charge codes and monitor expenditure for each of the direct reports and for the team
- g) Encourage staff to become certified professionals in their areas of expertise
- h) Encourage and provide opportunity to each IT staff member to share knowledge with relevant team/staff immediately after attending a training program
- i) Enable opportunities for staff to communicate/collaborate with other Non-profits and/or corporate
- j) Manager's responsibility to recognize internal IT trainers that elect to conduct training sessions
- k) Review the impact of the newly acquired skills on performance, adoption, and demonstration by staff.

## IT Staff Development Guideline

---

**4. Individuals** - All IT staff have a clear responsibility to develop their skills and knowledge as a means of enhancing performance in their primary and backup roles. Staff, therefore are encouraged to:

- a) Plan and take ultimate responsibility for their developments and learning
- b) Identify developmental needs through self-analysis, feedbacks from colleagues/peers and consultation with their supervisors
- c) Seek opportunities to improve skills and knowledge required in their current positions and possible future growth
- d) Take proactive initiatives to use “blended learning” approach for continuous development and the use of learning in achieving results
- e) Provide constructive feedback to peers and managers for their skill development and learning
- f) Provide feedback about the formal training program and faculty/facilitator that will be used as a reference for possible training engagements for others
- g) Proactively consult with managers when facing issues and challenges that require further skill development for sustainable performance

**5. Cross Functional Team** – A cross functional team will convene each year to:

- a) Review appropriateness of IT staff development guideline and suggest changes, if any, to Sr. Directors
- b) Recommend 3-5 required soft skills for IT staff, which will be pragmatically planned for implementation with the approval from VP of Technology/CIO.

## APPENDIX - I

ALMIS # 5882

**To:** CARE USA All Staff  
**From:** Executive Team  
**Subject:** Career Development Philosophy  
**Date:** 28 October 2005

Dear Colleagues:

In the results of the 2004 Employee Opinion Survey, staff clearly called for more attention to career development. Consequently, the Executive Team made career development one of its three priority areas for organization-wide action. As a way to begin to address staff concerns about the issue, we promised a “philosophy of career development.”

This memo is meant to help clarify what CARE means by career development, given widespread confusion about the term. Career development has often been used interchangeably with staff development, and the emergence of succession management at CARE has added another layer to the confusion. Here we want to sort out these terms and describe how career development relates to staff and leadership development, succession management, competencies, and performance management. You will be hearing more from us soon on succession management and how we intend to work with managers to help them fulfill their staff development responsibilities.

**CAREER DEVELOPMENT**—Career development is about preparing for one’s future. It’s an individual’s ongoing process of planning and action directed at achieving his or her professional goals. It means growth and development of one’s skills, supported by the opportunities for learning supplied by the organization or other entities. The purpose of career development is to ensure the best fit possible between an individual’s interests, skills, values, and aspirations and the requirements of the organization. It is often viewed as a means of linking individual goals to the business needs of the organization.<sup>1</sup>

Even though we always prefer to retain highly motivated and high-performing staff, CARE cannot guarantee a career to every individual. CARE will promote the understanding of career development as a life-long process for any individual which can unfold inside or outside the organization. One difficult issue continues to be the limited duration of much of CARE’s programming and our inability to retain country office staff beyond the end of their project contracts.

That said, CARE has not had any formal system to help individual staff members in understanding what career options are available within CARE for their particular needs and interests. We now wish to address this issue. To facilitate the individual efforts of staff members to pursue their own career development, we are putting in place the following systems and resources:

- Through the compensation and benefits study, we are devising a universally applied method to evaluate positions throughout CARE, which takes into account the skills, competencies and impact of the position on our mission.
- Based on significant staff feedback, we are reinstating the staff development section as an integral part of the annual appraisal process. We will develop guidance for managers on conducting

---

<sup>1</sup> These are current definitions in human resources and management literature. Specifically, this is drawn from Simonsen, Peggy, “Promoting a Development Culture in Your Organization,” Davies-Black Publishing, 1997. Pages 6-9.

development discussions to support them in playing this coaching role effectively. (Managers should be playing a coaching role in the development of their staff.)

- Career planning resources will be added to the CARE Academy website.
- A systematic succession management process is being developed that includes formal talent reviews by management (see section below). These reviews will identify staff with high potential for key positions, but also help the organization identify its staff development needs more broadly. We have agreed on a systematic process and will be finalizing the details later this month.
- In addition to the coaching module already available through the CARE Academy, we will develop or make available other formal coaching programs to assist managers in fostering the development of employees.

CARE already provides an array of learning opportunities for staff that can support an individual's career development. These currently come under the heading of "staff development".

**STAFF DEVELOPMENT**—Staff development is the training, development, and support that the organization provides to employees to focus their work on organizational objectives and ensure that the employee has the competencies to be successful in one's current job or assignment in the organization. In effect, it is focused on increasing individual capability in order to expand and enhance the organization's capacity to achieve its goals.

In recent years, CARE has provided a broad menu of staff development opportunities, including creation of the CARE Academy with online and instructor-led courses in critical skills and competencies, a leadership development program, and scholarships for specialized training. Regional management units have routinely conducted staff management, leadership and technical training programs. In addition, CARE—most often through country offices—offers a variety of temporary duty assignments and technical training opportunities, including in finance, emergency response, monitoring and evaluation, rights-based programming approaches, and sectoral skills (e.g. micro-finance, agriculture and conservation, basic and girls' education, HIV/AIDS, water, reproductive and children's health) for improving the staff's ability to advance our vision and mission.

Leadership development is an integral part of staff development. Leadership is a set of competencies that can be exercised at all levels of the organization, and that we as an organization want to nurture and develop throughout the staff. Leadership development is not to be confused with succession management, though candidates for succession management should demonstrate leadership potential and may be recommended for leadership development activities.

**SUCCESSION MANAGEMENT**—Succession management is an organizational process to ensure that diverse, highly qualified staff are prepared to take on critical leadership positions. The process aims to identify, groom, and develop candidates for key leadership and management positions. It requires careful planning and management by the organization's executive leadership and the Human Resources Division to ensure that the individuals identified receive the appropriate work assignments, external and internal support, and the opportunities to demonstrate growing capabilities.

We have recently reviewed lessons from past experience, feedback from staff around the globe, and research of external best practice. The review revealed little evidence of a clear plan or strategy for a systematic global process at CARE. Our goal is to change that, although it will not happen overnight. We will put in place a process that provides a common organizational definition and model for succession management, with a clear action plan for the Executive Team. It will be a deliberate process to preserve and transfer institutional knowledge, and should be viewed as only one component within a broader staff development

and talent management strategy. We will shortly provide more detailed information on the succession management process that we have agreed upon and how we will proceed with it.

**SUPPORTING SYSTEMS AND PROCESSES:**

Underpinning CARE’s work in staff development and succession management are two key systems and processes: the CARE USA competency model and performance management.

**Competencies** are the sets of skills, abilities, knowledge, and aptitudes required to be successful in any CARE job. CARE created a competency model four years ago as a way to identify the skills and behaviors needed to advance CARE’s new vision, mission and programming strategies. HR is currently assessing lessons learned in the application of the model in various regions in order to refine it.

The competency model must be reviewed in relationship to the organization’s core capabilities—that is, those that are needed to drive the organization’s achievement of its strategic objectives.<sup>2</sup> The definition of CARE’s core capabilities is a key activity for the enabling strategies in the Strategic Plan Extension FY06-07.

The Human Resources Division currently supports competencies with a competency development guide, and integration of competencies in job descriptions and Annual Performance Appraisals. The CARE Academy organizes its learning opportunities by competency so that staff can access the courses or resources for the competencies they seek to develop or enhance.

**Performance management** is the process through which individual performance is continuously guided and annually assessed. Managers are required to engage in continuous feedback through the year, and to provide specific assessment against a staff member’s job description and Individual Operating Plan at fiscal mid-year and year-end. HR provides guidance for managers and all employees on performance management through a Performance Management Handbook and coaching and counseling training. Individual consultation, when needed, is also available through the Human Resources Management Unit’s Regional Coordinators.

**Chart of Distinct Processes**

<b>Strategic Process</b>	<b>Focus in time</b>	<b>Who is driver</b>	<b>Aim</b>	<b>Available to whom</b>	<b>When does discussion happen</b>
<b>Career Development</b>	Future	Individual	Future job	All staff, but contingent on performance	Anytime with manager, or another coach
<b>Staff Development</b>	Present	Manager with individual	Enhanced competencies and performance	All staff	Formally, mid-year and annually
<b>Succession Management</b>	Present and future	Senior management, with full engagement of individual staff	Key position	Identified staff, based on performance and potential	Anytime

In conclusion, we are clarifying what the term career development means at CARE and taking steps to assist staff as they develop their careers. At the same time, we are working to promote staff development and putting in place a systematic succession management process. We hope that our efforts move us

<sup>2</sup> “Capabilities represent the skills, abilities, and expertise within an organization. They describe what organizations are able to do and how they are able to do it. They are the collections of individual competencies turned into organizational ones....they characterize the identity or personality of the organization.” From the chapter by David Ulrich, “Organizing Around Capabilities,” in *The Organization of the Future*, by The Drucker Foundation, Jossey-Bass Publishers, San Francisco, 1997.

further along the path of excellence, the core value we want to hold high for all of our staff growth, learning and development endeavors. We also wish to recognize again that our staff is our most important asset.

Anne, Deb, Joe, Patrick, Peter and Susan