Become an Analyst for the State of California

A guide to help you develop your analyst skills

Department of Personnel Administration

HR Modernization Project

We thank these contributors:

California Department of Education

Board of Equalization

County of Santa Barbara

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Getting started

If you're thinking about becoming an analyst

This guide will help you:

- Assess yourself
- Identify the knowledge, skills, abilities, and personal characteristics (competencies) needed to become an analyst
- Identify training to help you develop these competencies
- Discuss your current job performance and upward mobility with your manager
- Develop your career plan to become an analyst

How do I use this guide?

- Start by talking to your supervisor. Work together to fill out the self-assessment.
- Then work with your supervisor to identify the training you need.

For supervisors

Supervisors can use this guide to develop a career plan with the employee. We recommend you help the employee develop in ways that support your department's strategic goals.

You'll find detailed advice on page 32.

Use the employee's self-assessment

We recommend you and your employee complete the assessment separately and then meet to discuss one another's perspectives. The self-assessment helps you discuss:

- Career development plans
- Upward mobility plans
- The individual development plan and the performance appraisal summary (STD 637) - PDF. (This form, completed annually, is the primary method for evaluating the skill levels of BU 4 employees.)

Also see the guidance at the end of this guide.

Tailor training to meet the employee's needs

Employees have different training needs, depending on their existing skills, knowledge, attitudes, experiences, responsibilities, and assignments. They have different learning patterns and respond to different types of teaching. No single type of training will work well for everyone preparing to become an analyst.

Self-assessment

The self-assessment helps

- clarify what's important in your current job,
- identify performance gaps, and
- show you where you need to develop.

We recommend you and your supervisor complete this form separately and then meet to discuss your perspectives. Work together to develop an individual development plan or upward mobility plan. You'll find samples on page 30 (Sample IDP) and page 37 (sample upward mobility plan).

Use these scales as you take the self-assessment:

- **Importance to current job:** Critical, medium, or low.
- **Needs more development:** High need for training and development, refresher needed, or leave blank if training and development aren't needed.

Competencies

This comprehensive self-evaluation identifies competencies you'll need to become an analyst. You'll assess yourself in these key competencies:

- Analytical Thinking
- Customer Focus
- Oral Communication
- Written Communication
- Interpersonal Skills
- Organizational Awareness
- Professional And Personal Development

For each competency, we identify performance expectations. The expectations apply to anyone wanting to become a State analyst. Specifically, they're consistent with the job expectations negotiated for all employees of Bargaining Unit 4 (BU 4) and Bargaining Unit 1 (BU 1).

For more on competencies, see the Competency Dictionary (http://www.dpa.ca.gov/hr-mod/competency-dictionary.htm).

Analytical Thinking

	Importance to Current Job	Needs More Development
Develops and evaluates logical alternatives to solve routine problems.		
Analyzes data, discriminates between relevant and irrelevant data, and present ideas and information effectively.		
Reads routine correspondence or materials, simple charts, tables, graphs, and diagrams. Applies information to complete routine or simple tasks.		
Visually organizes information to get a point across; determine the best way to effectively present data so it will be understood.		
Gathers information from one or two sources identified by others.		
Organizes and maintains routine information using clearly outlined guidelines.		
Follows up with staff work that is complete and ready for an appropriate decision.		

Customer Focus

	Importance to Current Job	Needs More Development
Identifies customers and clients (internal and external) to identify what they want and to develop staff work tailored to meet their needs.		
Clarifies customer and client needs and resolves conflicts in priorities where they occur.		
Establishes and maintains rapport with customers and clients and lets them know he/she is willing to work with them to meet their needs.		
Solves customer problems quickly and effectively.		
Finds ways to measure and track customer satisfaction.		

Oral Communication Skills

	Importance to Current Job	Needs More Development
Organizes thoughts and ideas into a cogent and logical presentation.		
Ensures that others involved in a project or effort, including the manager, is kept informed about progress and problems.		
Consults with and advises administrators or other interested parties on a wide variety of subject-matter areas.		
Listens to others and responds appropriately.		
Presents ideas and information effectively.		
Facilitates productive meetings.		

Written Communication Skills

	Importance to Current Job	Needs More Development
Effectively communicates the results of his/her work to others.		
Presents a logical, objective, and well-considered line of thought.		
Meets agency or departmental standards for grammar, punctuation, and spelling.		
Composes documents or correspondence involving simple or routine information.		
Revises and edits his/her own work and seek help when necessary.		
Writes for tone, brevity, and effectiveness and proofreads own work.		
Avoids the use of jargon and bureaucratic terminology.		

Interpersonal Skills

	Importance to Current Job	Needs More Development
Gains and maintains the confidence and cooperation of management, other employees, customers, or others contacted during the course of work.		
Remains courteous when discussing information or eliciting non-sensitive or noncontroversial information from people who are willing to give it.		
Effectively handles situations involving little or no tension, discomfort, hostility, or distress.		
Anticipates how others will react to a situation.		

Organizational Awareness

	Importance to Current Job	Needs More Development
Understands principles, practices, and trends of public and business administration, management, and supportive staff services such as: Budgeting Personnel Management analysis Contracting		
Understands governmental functions and organization.		
Keeps current with issues which may have a future impact on the mission of the organization.		
Understands and effectively works within the organization's structure and policies.		

Personal and Professional Development

	Importance to Current Job	Needs More Development
Identifies with his/her supervisor areas where training may improve performance and enhance career goals.		
Maintains an open feedback loop with his/her supervisor regarding performance goals.		
Builds on strengths and addresses weaknesses.		
Seeks out new learning experiences and opportunities to master new knowledge. Takes advantage of professional development opportunities.		
Develops an Individual Development Plan as a follow-up to the performance evaluation process.		

After you take the self-assessment, it's time to talk

Talk with your supervisor about the areas critical to your current job that also show a high need for training and development. Make these your immediate training priorities, since they help improve current performance as well as help prepare you for an analyst position.

Work together to develop an individual development plan or upward mobility plan. You'll find samples on page 30 (Sample IDP) and page 37 (sample upward mobility plan).

Training

Choose the right course

For each competency, we list courses that will help develop that competency.

We recommend you look for courses that assess knowledge and skills before and after training. That kind of assessment ensures the course is effective and that the skills are put to use back on the job.

You can take many courses over the Web. The California Virtual Campus can help you find online courses in several subject areas (http://www.cvc.edu).

We encourage all State employees to enhance their skill sets and career opportunities. However, time and monetary reimbursement depend on your department's operation needs and funding, and on your bargaining unit contract.

Beyond formal training

You can also develop your analyst competencies through:

- Apprenticeships
- Communities of practice
- Expert interviews
- Internships
- Job aids
- Job shadowing
- Mentoring
- Storytelling
- Structured on-the-job training

For more information

Please contact

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- Joan Strohauer (916) 558-1812 or joanstrohauer@dpa.ca.gov

Training providers

We list only a few training providers here. Other departments, colleges, and training providers may offer the same or equivalent courses.

We recommend each department supplement this list by adding internal classes and other training providers. For departments that print this handbook, we've left space to add more providers and courses.

Cooperative Personnel Services (CPS)
Attn: Training Center
241 Lathrop Way
Sacramento, CA 95815
(916) 263-3614 Option 3
TrainingCenter@cps.ca.gov

California State University, Sacramento/College of Continuing Education (CSUS/CCE)
3000 State University Drive East
Sacramento, CA 95819-6103
Phone: (916) 278-4433; (800) 858-7743
http://www.cce.csus.edu/

Department of Technology Services (DTS)
P.O. Box 1810
Rancho Cordova, CA
95741-1810
(916) 464-7547
www.dts.ca.gov/training

State Personnel Board (SPB)
801 Capitol Mall
Sacramento, CA 95814
(916) 653-1705
http://www.spb.ca.gov

University California of Davis Extension (UCD)
1333 Research Park Drive
Davis, CA 95618
(800) 752-0881
(530) 757-8777
http://extension.ucdavis.edu/index.asp

Los Rios Community College District, Government Training Academy (LRCCD/GTA)
1410 Ethan Way
Sacramento, California 95825-2205
(916) 563-3230
http://www.trainingsource.losrios.edu/

Training curriculum by competency

Analytical Thinking

Definition: Approaching a problem using a logical, systematic, sequential approach; conducts completed staff work

Expectations

- Develop and evaluate logical alternatives to solve routine problems.
- Analyze data; discriminate between relevant and irrelevant data, and present ideas and information effectively.
- Read routine correspondence or materials, simple charts, tables, graphs, and diagrams; apply information to complete routine or simple tasks.
- Visually organize information to get a point across; determine the best way to effectively present data so it will be understood.
- Gather information from one or two sources identified by others.
- Organize and maintain routine information using clearly outlined guidelines.
- Follow up with staff work that is complete and ready for an appropriate decision.

Training curriculum

Each course may not meet all expectations listed above.

Communicating with Data helps participants present numerical data to managers, decision makers, or the general public so they can readily understand the data. Participants will learn concepts, conventions, and mechanics behind the effective use of tables, charts, and graphs and practice using them. (CPS, 8 hrs.)

Introduction to Completed Staff Work is about identifying competencies needed for Completed Staff Work (CSW) and becoming familiar with the basics of the seven-step CSW and problem solving models. This is accomplished through instruction and individual and group practice on problems and scenarios presented by the instructor. It may be considered an upward mobility course to provide employees with an opportunity to prepare for more challenging positions. (SPB, 8 hrs.)

Completed Staff Work will prepare participants to effectively recommend solutions to management problems. The process results in a product that will require only the manager's signature to implement recommendations. Identify barriers/problems that may be encountered in doing staff work and alternative

solutions to overcoming those barriers, identify factors to consider when preparing a recommendation, demonstrate a seven-step approach in analyzing a practical, work-related case, and prepare written recommendation using the "action memo" format. (CPS, 16 hrs.)

Completed Staff Work is designed to provide participants with a thorough understanding of the concepts of Completed Staff Work (CSW) and an opportunity to experience working on analytical problems individually and in teams using the seven-step CSW model. It is designed to provide participants with practice on creating evaluation criteria, analyzing and evaluating alternatives, and preparing recommendations for implementation based on generally accepted standards for government agencies. (SPB, 16 hrs.)

Introduction to Analytical Staff Work helps participants understand the role of the analyst and the basic skills required. Participants will have the opportunity to perform assignments typical to government analysts, assess interest and skill level in performing analytical work, and build knowledge and confidence to advance within government services. Learners will be able to list the seven steps of systematic analysis, apply spreadsheet methodology, design data collection survey, and recognize different data and their application and report formats. (CPS, 16 hrs.)

Overview of Analytical Skills will provide an overview of the fundamental skills and competencies necessary for success as an analyst. (CSUS/CCE, 4 hrs.)

Introduction to Analytical Skills will help you understand the role of the analyst and the basic skills required. It will also give you an opportunity practice assignments often given to State analysts. You will also be able to assess your interest and skill level in performing analytical work. Participants will recognize various types of data, diagnose issues through data analysis, understand the dynamics, recognize commonly used report formats, and use systematic analytical strategies. (SPB, 16 hrs.)

Developing Analytical Skills provides participants with hands-on experience performing analytical work, including: project work plans, gathering and analyzing data, preparing an issue paper and making an oral presentation of findings and recommendations. (CPS, 40 hrs.)

Fundamentals of Business Analysis - Develop the knowledge and skills you need to succeed as a business analyst and enhance your ability to create solutions to business problems. Explore the fundamentals of business analysis using the International Institute of Business Analysis's(R) (IIBA(R)) Business Analysis Body of Knowledge (BABOK(R)). Learn the techniques, methodologies and core competencies required of effective business analysts. Explore best practices,

strategies, needs and opportunities, system requirements, and the implementation and operational support of business solutions. (UCD, online.)

Introduction to Critical Thinking covers concepts and methods central to sound critical thinking. It provides skills useful to pre-analysts during problem identification, identifying and evaluating alternatives, and other steps in the problem solving process. (CPS, 16 hrs.)

Critical Thinking is designed to help participants learn how to apply critical thinking principles to address day-to-day problems with an easy to use problem solving process. This is an experiential course. Includes activities with case studies, scenarios, problem solving and exercises to practice using new skills. (DTS, 8 hrs.)

Critical Thinking Skills will provide participants with the definitions and various components that contribute to problem solving, creative solutions, and logical argument. This hands-on approach addresses the processes and applications of the critical thinking skills required in a professional environment. (CSUS/CCE, 16 hrs.)

Critical Thinking Skills provides participants with information and methods to help analyze policies, evaluate documents, filter information, and solve problems. Participants will be able to analyze various situations, identify central issues in a complex document, identity valid sources of information and expertise, solve problems systematically, understand and explain the dimensions of a problem, and apply critical thinking model to a realistic organization problem. (SPB, 8 hrs.)

Productive Thinking Workshop will introduce you to the essential principles of a new and powerful thinking methodology. You will understand the keys to unlock your natural productive intelligence and unblock your thinking. You'll learn and apply the skills you need to develop your untapped thinking capacity to solve problems, discover opportunities, and implement solutions. Learn to recognize and overcome the three most common barriers to thinking more productively and how to break the unproductive thinking patterns holding you back. (CPS, 8 hrs.)

Introduction to Project Planning for Pre-Analysts - As the world of work becomes more collaborative; employees in state government are increasingly involved as team leaders and members for projects large and small. In order to advance to the role of analyst, one must develop good team membership and leadership skills. The most effective way to ensure the success of any project, whether simple or complex is to plan it well at the outset. In this highly interactive course, you will also receive a comprehensive set of tools to aid in project planning. This step-by-step course introduces a logical, powerful, and integrated project planning methodology to participants who have no project management experience. (SPB, 8 hrs.)

Problem Solving and Decision Making provides realistic experiences that allow you to integrate and apply skills in group planning, problem solving, decision making, and facilitating positive group behaviors and processes. Participants will learn to define a problem, write a clear problem statement, distinguish between terms, utilize consensus-seeking techniques, use basic data collection tools and techniques, develop an action plan and use basic project scheduling and monitoring tools and techniques, describe a process for making ethical decisions, present four effective formats for communicating and selling ideas, and transfer training content and process into the daily work environment. (CPS, 32 hrs.)

Internal classes or classes offered by other providers:

Customer Focus

Definition: Identifying and responding to current and future client needs; providing excellent service to internal and external clients

Expectations

- Identify customers and clients (internal and external) to find out what they want and develop staff work tailored to meet their needs.
- Clarify customer and client underlying needs and resolve conflicts in priorities where they occur.
- Establish and maintain rapport with clients and customers and let them know he/she is willing to work with them to meet their needs.
- Solve customer problems quickly and effectively.
- Find ways to measure and track customer satisfaction.

Training curriculum

Each course may not meet all expectations listed above.

Customer Service Excellence builds people skills and identifies critical issues necessary to improve customer relations. (CPS, 8 hrs.)

Fundamentals of Customer Service teaches participants to define customer service; the role of customer service in business; discusses the types of customers/value of a customer; and the goal of customer service. (This class, as well as other customer service classes, is offered by LRCCD/GTA as custom, in-house courses for any state agency. Prices vary depending on length.)

Internal classes or classes offered by other providers:

Oral Communication

Definition: Listens to others and communicates in an effective manner

Expectations

- Organize thoughts and ideas into a cogent and logical presentation.
- Ensure that others involved in a project or effort, including the manager, is kept informed about progress and problems.
- Consult with and advise administrators or other interested parties on a wide variety of subject-matter areas.
- Listen to others and responds appropriately.
- Present ideas and information effectively.
- Facilitate productive meetings.

Training curriculum

Each course may not meet all expectations listed above.

Communicating Effectively helps participants improve oral communication skills, increase their ability to understand and be understood, and gain more influence. Participants will be able to communicate clearly by using appropriate non-verbal behavior, listen effectively, and assess the effects of different communication styles. (CPS, 8 hrs.)

Effective Communication allows participants to learn highly effective communication skills including how to convey information so that the listener clearly understands; allow the listener to make informed choices; show empathy in situation requiring sensitivity; confront in a professional manner when necessary. This is a highly interactive course with activities that include challenging scenarios, problem solving and exercises to practice using the new skills, and in-depth discussions in breakout groups to develop and articulate understanding of concepts. (DTS, 8 hrs.)

Enhancing Communication in the Workplace allows participants to identify personal characteristics of the people they work well with and identify those styles that cause them confusion and difficulty. Participants will discover four primary communication behavioral styles used by individuals in the workplace and explore their own style preferences. Helpful suggestions are provided to manage diverse style and talents and to create a more inclusive workforce. (SPB, 8 hrs.)

Effective Listening helps participants pay better attention to communication and retain more information by closing the communication loop, overcoming listening barriers, exercising choices as a listener, listening non-verbally, establishing rapport, and defusing hostility. (CPS, 8 hrs.)

Effective Presentations enables participants to practice techniques, receive special coaching and deliver two presentations in a supportive and encouraging environment. The course focuses on preparation, using audio-visual aids, building confidence, analyzing an audience, establishing rapport, responding to questions, using effective platform techniques, and practicing relaxation. (CPS, 16 hrs.)

Listening Skills will help participants understand why "listening" is critical to the communication process and the most important communication skill to learn; learn how to be an engaged, thoughtful, active listener; enhance understanding of the speaker's message; complete an assessment tool, and develop a personal action plan for enhancing individual listening skills. (DTS, 8 hrs.)

Presentation Skills for Analysts enables participants to apply adult learning principles to presentation preparation and delivery; use methods for engaging an audience and keeping it interested; handle nerves and hostility more effectively; identify and practice verbal and nonverbal elements of effective delivery style; overcome common presentation blunders. (SPB, 16 hrs.)

Conducting Effective Meetings is for team leaders, supervisors, project managers, and anyone else leading meetings at work. Participants will learn how to plan and start meetings, keep things going, clarify roles, facilitate, and work with difficult attendees. This class helps you make good use of meeting time, be clear about how decisions are being made, and leave meetings knowing that time was used well. (CPS, 8 hrs.)

Meetings that Produce Results will give confidence to any person to run a meeting better, whether leading or attending. Participants will learn all the components of a good meeting, how to prepare a meeting contract, how to deal with challenging people, how to build consensus, and how to organize a meeting using a seven-step problem solving process. The practicalities of writing on flip charts and how to deal with panic as an inexperienced facilitator will be covered. (CPS, 16 hrs.)

Internal classes or classes offered by other providers:

Written Communications

Definition: Ability to communicate simple ideas, thoughts and facts in writing; ability to use correct grammar, correct spelling, sentence and document structure, accepted document formatting

Expectations

- Effectively communicate the results of his/her work to others.
- Present a logical, objective and well-considered line of thought.
- Meet agency or departmental standards for grammar, punctuation, and spelling.
- Compose documents or correspondence involving simple or routine information.
- Revise and edit his/her own work and seek help when necessary.
- Write for tone, brevity and effectiveness and proofread one's own work.
- Avoid the use of jargon and bureaucratic terminology.

Training curriculum

Each course may not meet all expectations listed above.

E-Communication Workshop - Most e-mails are sent with little editing or structure, creating confusion and multiple problems. Fortunately or unfortunately, it becomes a permanent record, with your name or department's name attached. This workshop provides tools to help the participant create clear and informative e-messages by improving the planning, writing, and editing processes. (CPS, 8 hrs.)

Grammar – This program will debunk confusing myths about language and give you confidence in your ability to use and explain grammar, punctuation, and usage rules. It will help participants apply contemporary rules for sentence construction, capitalization, writing, usage standards, punctuation, and more. (CPS, 24 hrs.)

Grammar & Punctuation Brush-Up – This program reviews the basics of grammar, with a focus on sentence structure and syntax. As we identify and correct common grammar and punctuation errors, participants will become informed drafters, making changes to their own documents as well as to those of others not because "it sounds better," but because they know the rules. (CPS, 8 hrs.)

Information Mapping is designed to provide the analytical and organizational techniques needed to develop concise, easy to read memos, reports, and other business communications that convey key information clearly and generate expected results. (CPS, 16 hrs.)

Plain Language Writing introduces tips and techniques to improve clarity through

plain English. California State government agencies are mandated by California Government Code section 6219, to "write each document … in plain, straightforward language, avoiding technical terms as much as possible, and using a coherent and easily readable style." Debunk myths surrounding government writing, identify and use plain language, establish criteria for clear writing, edit clarity without compromising accuracy, and recognize and revise bureaucratic style. (CPS, 4 hrs.)

Effective Writing – Administrative writing assists participants to overcome the fear of writing (especially for another's signature), organize thoughts, and communicate using clear concise language. Participants will be able to create business-like and professional documents and identify and edit for clichés, bureaucratic jargon, and wordiness. (CPS, 16 hrs.)

Writing Letters & Memos enables participants to identify reader and writer needs, select an appropriate tone and style for different audiences, get started by overcoming writer's block, edit for clarity and efficiency and design correspondence for visual interest and emphasis. (CPS, 8 hr.)

Writing Style Tips enhances clarity and concision in work documents. Learn to draft readable, professional documents from the bottom up by crafting crisp, clear sentences in plain English. Appropriate for business and technical writers. Solid understanding of grammar recommended. (CPS, 8 hrs.)

Introduction to Writing for Analysts teaches participants how to become more competent and confident writers. Using the WRITE method, the course provides a clear and painless way to prepare, generate ideas, and produce an orderly document. Participants will be able to eliminate jargon, "bureaucratese," and wordiness; utilize plain language; understand and utilize the active voice; write concise, yet complete documents; utilize parallel structure and other consistency tips; employ graphics when and where appropriate; analyze your audience and purpose for writing; organize and edit content for clarity, conciseness, and correctness. (SPB, 8 hrs.)

Writing Skills for Analysts helps make improvement in writing skills using the building blocks for successful report writing. This course teaches report structure and organization, paragraph development, sentence construction, document proofing and editing, and summarizing report findings. Self-assessment of current writing skills gives participants a clear understanding of their skill level and areas for improvement. Descriptions of common analytical writing styles and helpful reference resources are also covered. (CSUS/CCE, 16 hrs.)

Writing Skills for Analysts will help participants analyze writing tasks, determine their audience and purpose, and select the most effective strategy. By examining

the writing process behind the final product, participants will learn how to write more effective, deliberate documents that are clear, coherent, and compelling. (CPS, 8 hrs.)

Internal classes or classes offered by other providers:

Interpersonal Skills

Definition: Extent to which an individual gets along and interacts positively with co-workers; degree and style of understanding and relating to others

Expectations

- Gain and maintain the confidence and cooperation of management, other employees, customers, or others contacted during the course of work.
- Remain courteous when discussing information or eliciting non-sensitive or non-controversial information from people who are willing to give it.
- Effectively handle situations involving little or no tension, discomfort, hostility, or distress.
- Anticipate how others will react to a situation.

Training curriculum

Each course may not meet all expectations listed above.

Conflict Management will provide participants with tools, techniques, and practice in resolving work conflicts involving employees, coworkers, supervisors, or customers. Strategies for win-win outcomes are emphasized in this interactive class, especially ways to guide a conflict from a competitive mode into a collaborative one. Participants will identify the six sources of conflict; name five styles of dealing with conflict; describe personal their own style of dealing with conflict; use each style as appropriate and practice and encourage collaboration to resolve conflict. (CPS, 8 hrs.)

Dealing with Difficult People helps participants deal with challenging personalities in the workplace. Emphasis is on maintaining a professional approach while coping with various problem behaviors, whether it is with customers, co-workers, or even a supervisor. In this very interactive class, participants will recognize specific difficult behaviors and will have guidance for deciding what is appropriate to do about each. Participants will also have the opportunity to discuss the costs of difficult behaviors and what to do about them. Participants will leave this training having options and feeling more in control, rather than feeling frustrated, helpless, or manipulated by difficult people. (CPS, 8 hrs.)

Interpersonal Skills is the foundation of effective relationships at work. With an emphasis on professional and clear communication, this two-day interactive training will help participants improve oral communication skills, increase ability to understand and be understood, and help have more influence. This class provides participants with practice in these skills, and opportunities to discuss and solve actual interpersonal work issues; improve first impression, listening skills, assertive skills, and nonverbal communications. (CPS, 16 hrs.)

Interpersonal Skills for Pre-Analysts prepares the individual for entry to and understanding of the interpersonal side of the analyst's position. It gives participants the opportunity to better understand how they and others take in, process and act upon information. It also provides them with an opportunity to enhance their communication skills. (SPB, 8 hrs.)

Relationship Strategies for the Workplace will increase effectiveness and understanding of others (and yourself) in the workplace. A four-part model is used to explain and interpret human behavior. It is a non-threatening way to present information about personality styles so they can be viewed in a positive light and gives more specific personality information to individuals in order to build strong relationships in the workplace. (CPS, 8 hrs.)

Respect: The Source of Our Strength will help individuals define respect for themselves and respect in the workplace. People are being required to produce results while doing more with less which can lead to increased stress, conflict and tension in the workplace. Combine this with the challenges of a changing and diverse workforce and you have an opportunity for disrespectful, unproductive, and toxic work environments. This workshop will provide the tools to make the necessary changes to contribute to a respectful workplace. (CPS, 8 hrs.)

Internal classes or classes offered by other providers:

Organizational Awareness

Definition: Understand the internal workings, structure, culture of the organization

Expectations

- Understand principles, practices, and trends of public and business administration, management, and supportive staff services such as:
    - Budgeting
    - Personnel
    - Management analysis
    - Contracting
- Understand governmental functions and organization.
- Keep current with issues which may have a future impact on the mission of the organization.
- Understand and effectively work within the organization's structure and policies.

Training curriculum

Each course may not meet all expectations listed above.

Legislative Process helps participants follow the path of a bill from its introduction in the Legislature to its signature by the Governor. It also provides participants with an overview of the legislative branch of California State Government, including: role of the Assembly and Senate, organization of legislative leadership, reading legislative bills, structure of legislative committees, legislative publications, and role of the legislative staff. (CPS, 8 hrs.).

Internal classes or classes offered by other providers:

Professional and Personal Development: Learning

Definition: Desiring and making an effort to acquire new knowledge and skills for work

Expectations

- Identify with his/her supervisor areas where training may improve performance and enhance career goals.
- Maintain an open feedback loop with his/her supervisor regarding performance goals.
- Build on strengths and address weaknesses.
- Seek out new learning experiences and opportunities to master new knowledge. Take advantage of professional development opportunities.
- Develop an Individual Development Plan as a follow-up to the performance evaluation process.

Training curriculum

Each course may not meet all expectations listed above.

Career Development Series: Part 1 Career Match will enable participants to develop a Career Development Plan that outlines internal and external resources available to come to work refreshed, positive, and focused on partnering with the agency in achieving professional goals. Participants will identify issues and trends in the public sector and their impact on your career development; develop a five-year Career Vision outlining what you want your future work life to look like; receive a personalized career inventory based on personality type and career interests and identify influences on career development; identify potential career matches by evaluating results against various industries, agencies, professions and positions within the public sector; outline a Career Development Plan to achieve a Career Vision with strategies to implement back on the job the very next day. (CPS, 8 hrs.)

Career Development Series: Part II Resumes will help you create a market-driven resume. You will learn to identify your professional accomplishments and articulate them in a way that gets people's attention; rework these principles into your own resume; outline the steps necessary for creating an ASCII resume and tips for online posting; draft a reference page that will lead your references and hiring managers to talk about what YOU want them to talk about; learn about cover letter formats that hiring managers love to see. (CPS, 8 hrs.)

Career Development Series: Part III Interviewing – In this course you will get ideas as to how to set yourself apart from the crowd and develop one of the strongest interview strategies; review different interview formats, the advantages and

disadvantages of each and how to best prepare for them; learn what employers are really looking for behind those dreadful behavioral interview questions; outline the do's and don'ts of effective interviewing before, during and after the interview; evaluate the importance of the final transition and its impact on your success in your new position, your previous position or agency, on your overall communications strategy and Career Development Plan. (CPS, 8 hrs.)

Increasing Human Effectiveness is a personal development program that empowers people with tools to break through self-imposed limitations, resulting in greater productivity and a healthier bottom line. It lays the foundation for self-management and personal accountability and focuses on the most significant causal factor that determines purposeful behavior – the personal beliefs and attitudes of people. Participants will learn to accept new ideas; displace non-productive attitudes, habits and beliefs; accept personal responsibility and become a more effective self-manager; overcome fear of failure and become more confident; and motivate yourself and others with dignity. (CPS, 16 hrs.)

Survival Skills for State Employees part 2: Career Management - In this 2-hour webinar, new state employees will gain information on various avenues they can take to advance their career within state service. This module will address state-specific career management terms and strategies such as: Upward Mobility; Job-required, Job-Related and Career Development training classes; career ladders; promotional exams; eligibility lists, lateral transfers; networking for success; career disrupters; working out of class to advance your career; volunteer opportunities; and the importance of IDPs and annual performance reviews. (CPS, 2 hrs. webinar)

Time Management offers practical techniques for accomplishing more in less time. This course will help identify/overcome time wasters; use organizational tools to save time on the job; deal with unexpected visitors; apply time-saving techniques to conquer paper pile-up; better organize the workplace and identify individual creative time and take advantage of it. (CPS, 8 hrs.)

Time Management will help participants learn how to identify goals that are consistent with values and mission; achieve goals by establishing objectives; prioritize activities based upon importance and urgency; engage in long-term and daily planning; set up a tracking system; use an efficient process for organizing and addressing incoming information. (DTS, 8 hrs.)

Time Management – Focus: Achieving Your Highest Priorities helps make improvements in personal or professional productivity by learning to set clear goals and by gaining control of competing demands. Learn how to master the skills of planning weeks; how to clearly define goals; reduce stress; master information management with proven planning system; and how to balance work and life. (CPS, 8 hrs.)

Internal classes or classes offered by other providers:

Sample IDP and Performance Appraisal Summary (STD 637)

STATE OF CALIFORNIA — DEPARTMENT OF PERSONNEL ADMINISTRATION

INDIVIDUAL DEVELOPMENT PLAN

FOR FUTURE JOB PERFORMANCE OF PERMANENT EMPLOYEES

STD. 637 (REV. 7-94)

EMPLOYEE NAME *(Last, First, Middle Initial)*	DATE OF THIS PERFORMANCE DISCUSSION	
CIVIL SERVICE TITLE	POSITION NUMBER	LAST PERFORMANCE DISCUSSION DATE
STATE DEPARTMENT NAME	DEPARTMENT SUBDIVISION	EMPLOYEE'S HEADQUARTERS

PERFORMANCE OBJECTIVES — Goals for further improvements in job performance during the next year in order to meet or exceed standards for the employee's present job or to develop employee skills.	**PLANS FOR ACHIEVING OBJECTIVES** — Specific methods by which the employee can work toward accomplishing his or her performance objectives (in-service training courses, college courses, rotation, special work assignments for training purposes, etc.).

I HAVE PARTICIPATED IN A DISCUSSION OF OVER-ALL JOB PERFORMANCE

EMPLOYEE'S SIGNATURE	DATE SIGNED	SUPERVISOR'S SIGNATURE	DATE SIGNED

(Over)

STATE OF CALIFORNIA — DEPARTMENT OF PERSONNEL ADMINISTRATION

PERFORMANCE APPRAISAL SUMMARY

OF PAST JOB PERFORMANCE OF PERMANENT EMPLOYEES

STD. 637 (REV. 7-94C) (REVERSE)

PERFORMANCE FACTORS	I	M	E*	COMMENTS*
1. **QUALITY OF WORK:** Consider the extent to which completed work is accurate, neat, well-organized, thorough, and effective.				
2. **QUANTITY OF WORK:** Consider the extent to which the amount of work produced compares to quality standards for the job.				
3. **WORK HABITS:** Consider the employee's effectiveness in organizing and using work tools and time, in caring for equipment and materials, in following good practices of vehicle and personal safety, etc.				
4. **RELATIONSHIPS WITH PEOPLE:** Consider the extent to which the employee recognizes the needs and desires of other people, treats others with respect and courtesy, and inspires their respect and confidence, etc.				
5. **TAKING ACTION INDEPENDENTLY:** Consider the extent to which the employee shows initiative in making work improvements, identifying and correcting errors, initiating work activities, etc.				
6. **MEETING WORK COMMITMENTS:** Consider the extent to which the employee completes work assignments, meets deadlines, follows established policies and procedures, etc.				
7. **ANALYZING SITUATIONS AND MATERIALS:** Consider the extent to which the employee applies consistently good judgment in analyzing work situations and materials, and in drawing sound conclusions.				
8. **SUPERVISING THE WORK OF OTHERS:** Consider the employee's effectiveness in planning and controlling work activities, motivating and developing subordinates, improving work methods and results, encouraging and supporting employee suggestions for work improvement, applying policies, selecting and developing subordinates in accordance with State Personnel Board and departmental affirmative action policies.				
9. **PERSONNEL MANAGEMENT PRACTICES:** Consider the extent to which the employee understands and applies good personnel management practices including affirmative action and upward mobility. Does the employee contribute effectively to the implementation of State Personnel Board and departmental equal employment opportunity policies and to the attainment of affirmative action goals?				

GENERAL COMMENTS OR COMMENTS ON OTHER FACTORS

*The supervisor may make "comments" only, or may use rating categories only, or may use either or both methods of appraisal on any performance factor, as he or she prefers. The rating categories are:

I - Improvement needed for performance to meet expected standards
M - Performance fully meets expected standards
E - Performance consistently exceeds expected standards

Guidance for supervisors

How do I develop a good IDP?

DPA rules state that IDPs will be completed yearly after the initial probationary period ends.

A good IDP helps employees

- improve their performance,
- achieve their career goals, and
- achieve organizational goals.

Gauge the amount of guidance an employee needs

Consider the employee's performance, experience, training, duty statement, and career goals.

Talk with the employee

Discuss the IDP immediately after probation ends, and then at least once a year. Ask the employee about on-the-job goals and career goals. Talk about the training or developmental activities needed to accomplish these goals. Include these goals and activities in the IDP.

Refer to the IDP regularly

Communicate continually with the employee about plans for achieving the training objectives laid out in the IDP. Refer to the IDP during the year and make any necessary changes.

Evaluate performance every year

Evaluate overall performance. Talk to the employee. Discuss career goals and how they can be achieved.

How can I help employees develop professionally?

As a supervisor, you have a special role in developing your employees.

Coach and mentor employees

Develop an informal coaching and mentoring relationship with the employee. This will help you observe the employee's performance and provide useful feedback. Your feedback should be specific and focus on observable behavior.

Conduct quarterly formal check-ins with the employee to ensure the employee is meeting developmental goals and performing scheduled activities.

Provide specific, constructive feedback about performance and potential areas for development. You can base your feedback on both your observations and what others have told you.

Encourage, support, and reinforce the employee's efforts at professional development.

Encourage self-development

Always encourage employees to participate in continuing self-development activities in schools and professional associations.

Employees often initiate and fund self-development efforts and normally complete them during non-work hours. In some cases, you may accommodate an employee during work hours. This is especially appropriate if the self-development activity may increase the employee's contributions to the department's mission.

Talk about training courses before and after

When an employee takes a training course, meet before the course begins and after it ends. In the first meeting, discuss the course objectives and the outcomes you expect. After the course, ask the employee to discuss what he or she learned, and how this new knowledge can enhance personal and organizational performance. Ask how the course will help the employee achieve career goals.

Be a good role model

Model the behavior you expect the employee to develop.

Build the employee's relationships

Help the employee develop relationships with others in your department or organization.

Resources to help you give useful performance feedback

Falcone, P. (2005). 2600 Phrases for Effective Performance Reviews, AMACOM, New York.

Max, D., & Bacal, R. (2003). Perfect Phrases for Performance Reviews. McGraw Hill, New York.

Neal, J. (2006). Effective Phrases for Performance Appraisals: A Guide to Successful Evaluation. Neal Publications, Inc., 127 West Indiana Avenue, P.O. Box 451, Perrysburg, Ohio 43552-0451.

Lee, D., (2008). Do You Make These 19 Common Mistakes When Giving

Constructive Feedback? Retrieved on January 21, 2009 from the HumanNature@Work Web site: http://www.humannatureatwork.com/constructive-feedback-mistakes-to-avoid.htm.

Andres. (2007). My Rules of Feedback: Team Vision. Retrieved on January 21, 2009 from the Consulting Jiujitsu Web site: http://www.taylor.se/blog/2007/06/13/myrules-of-feedback/.

Business Performance Pty Ltd., (2008). Constructive Feedback in the Workplace. Retrieved on January 21, 2009 from the Business Performance Web site: http://businessperform.com/html/constructive_feedback.html.

Wiley Publishing, Inc. (2009). Giving Constructive Feedback. Retrieved on January 21, 2009 from the Dummies.com: Making Everything Easier Web site: http://www.dummies.com/how-to/content/giving-constructive-feedback.html.

Guidance for employees

How can the IDP help me become an analyst?

DPA rules state that IDPs will be completed yearly after the initial probationary period ends.

A good IDP helps employees

- improve their performance,
- achieve their career goals, and
- achieve organizational goals.

Identify the gap

Review all the duties, knowledge, skills, and abilities required in your current job. Compare those with the competencies listed in this guide. You'll discover the gap between your current job and what's needed as an analyst.

Set your objectives

What new skills, knowledge, and experiences would you like to acquire during the next year? Focus on improving job performance so you can meet or exceed standards for your present job and achieve your career goals at the same time.

Make a plan

Work with your supervisor to create your plan for the next year.

How can I achieve my objectives?

Develop yourself through training

In the IDP, under "Plans for Achieving Objectives," you and your supervisor can suggest training, conferences, and seminars offered by your department or by outside vendors.

Training doesn't just mean taking classes in a classroom. It can include:

- cross-training
- on-the-job training
- assignments (rotation or training and development)
- staff meetings
- information dissemination

- on-line training
- technical assistance
- workshops, seminars, conferences
- self-directed studies
- written guidelines

Stay motivated and keep going!

You may face barriers on your path to professional development. The everyday demands of your job can take all of your energy and time—if you let them. You may not get rewarded immediately for taking time to work on your development plan.

But your long-term success depends on your professional development. So does your value to the organization. Don't let barriers prevent you from achieving your goals.

Remember, no one else will take as strong an interest in your development as you. Take responsibility for developing your skills and stay motivated.

Sample upward mobility plan

BOE-1001 (51F) REV. 1 (4-04)
UPWARD MOBILITY PLAN

STATE OF CALIFORNIA
BOARD OF EQUALIZATION

Instructions: This form is to be used to establish a career plan for candidates accepted into the Upward Mobility Program.

CANDIDATE INFORMATION

A. NAME	DIVISION/PROGRAM/UNIT
B. CIVIL SERVICE CLASSIFICATION	POSITION NUMBER
C. CAREER OBJECTIVE CLASSIFICATION *(e.g., STM or Tax Auditor)*	PHONE NUMBER / MIC NUMBER
D. COMPLETION DATE OF CAREER PLAN	

E. PRESENT SKILLS, EDUCATION, EXPERIENCE THAT MEET CAREER OBJECTIVE CLASSIFICATION *(Please review classification specification for minimum qualifications.)*		F. SKILLS, EDUCATION, EXPERIENCE REQUIRED TO MEET CAREER OBJECTIVE CLASSIFICATION *(Please review classification specification for minimum qualifications.)*	

ACTIONS REQUIRED TO MEET CAREER OBJECTIVES

G. COURSE/EDUCATIONAL INSTITUTE PROJECT/TRAINING/EXPERIENCE	COURSE DESCRIPTION, IF APPLICABLE	PLANNED START DATE	PLANNED COMPLETION DATE

BOE-1001 (S1B) REV. 1 (4-04)

H. PROPOSED REIMBURSEMENT

HOURS OF TIME REIMBURSEMENT *(if necessary, see bargaining unit contract)*	AMOUNT OF MONEY REIMBURSEMENT *(if necessary, see bargaining unit contract)*

Supervisor's Recommendation *(make comments below)*

I. DISCUSSIONS/COMMENTS/ADJUSTMENTS/CHANGES

ARE OPERATIONAL NEEDS IMPACTED?

☐ Yes ☐ No *(if yes, please explain)*

	SUPERVISOR'S SIGNATURE	PRINT SUPERVISOR'S NAME	PHONE NUMBER	DATE
☐ Approved ☐ Disapproved				

EMPLOYEE ACKNOWLEDGEMENT

I understand and acknowledge that I must maintain satisfactory performance in my current position. I also understand that I must maintain good standing in any academic and/or training programs that are part of this approved Upward Mobility Plan. I further acknowledge and understand that my participation in the Upward Mobility Program does not guarantee that I will be promoted. It does however, provide me with experience necessary to be considered for advancement. I agree to meet with my supervisor twice a year to review this Upward Mobility Plan, refining and adjusting the plan as needed. I acknowledge that BOE may terminate this Upward Mobility Plan if I fail to meet this commitment.

EMPLOYEE SIGNATURE	DATE

REVIEWED BY

TRAINING COORDINATOR		DATE
PMS/CLASSIFICATION SECTION	☐ Approved	DATE
DIVISION CHIEF	☐ Approved	DATE
DEPUTY DIRECTOR/DIRECT REPORT	☐ Approved	DATE
EEO OFFICE		DATE

COMPLETION/MODIFICATION OF PLAN

Amended date: _____

☐ Objective amended ☐ Goal met

☐ Goal not met ☐ Unsatisfactory job performance ☐ Separation

☐ Other:

APPROVED BY *(print names)*	SIGNATURE	DATE
EMPLOYEE		
SUPERVISOR		
DIVISION CHIEF		
DEPUTY DIRECTOR/DIRECT REPORT		

BOE-1001 (S2F) REV. 1 (4-04)
UPWARD MOBILITY PLAN

STATE OF CALIFORNIA
BOARD OF EQUALIZATION

Instructions for Preparing the BOE-1001, Upward Mobility Plan

Board of Equalization Administrative Manual (BEAM) Section 1860.4 states that all Upward Mobility (UM) candidates must prepare a written UM Plan (BOE-1001). All requests to participate in the UM program require Board of Equalization (BOE) management review and approval prior to implementation, and should be reviewed or adjusted yearly in conjunction with the Annual Training Plan (ATP) process. Approvals for participation in the UM program do not guarantee promotional opportunities. The BOE-1001 is an agreement between the employee and BOE management that a commitment exists to reach the goals outlined on this document.

Please read and understand the Upward Mobility Policy as published in the BEAM (Section 1860) and minimum qualifications before requesting supervisor time and assistance in completing the Upward Mobility Plan (BOE-1001).

Employees with approved Upward Mobility Plans should include their requests on their ATP and Training Plan Spreadsheet. Guidelines are on eBOE. Contact the Training Office at 916-445-3350 if you have questions regarding the completion of the forms.

The Upward Mobility Plan may be implemented after the approval of the Division Chief or Deputy Director/Direct Report.

CANDIDATE INFORMATION

Section A. Enter your name, and division, program and/or unit name.

Section B. Enter your current classification title and position number.

Section C. Enter the career objective classification title, phone number, and MIC number.

Section D. Enter the career plan completion date.

Section E. List present skills, education, experience which meet the career objective.
(Review the classification specification for minimum education and/or experience requirement for career objective).

Section F. List skills, education, experience required to meet the career objective.
(Review the classification specification for minimum education and/or experience requirement for career objective).

Note: If you have questions regarding course qualification, contact the Classification Section at 916-323-3944. When inquiring about a particular course, it will be helpful to provide the specific course description and the name of the educational institute.

ACTIONS REQUIRED TO MEET CAREER OBJECTIVES

Section G. List course titles, projects, training, experience and/or the educational institution, course description, planned start date, and planned completion date required to meet career objectives. (Attach additional information if needed.)

Section H. Briefly summarize the proposed reimbursement. For example, the cost of tuition and books and if applicable, any requested UM time reimbursement. (Attach additional information if needed.)

Section I. Supervisors should enter any recommendations, comments, adjustments or changes they may have discussed with employee. Please include for example, how much you might approve in time and money reimbursement.

Check yes or no, if operational needs are impacted. If yes, please explain.

Approved or disapproved – Check appropriate box.

Signature – To be signed by the Supervisor.

Print supervisor's name, enter phone number and date signed.

EMPLOYEE ACKNOWLEDGEMENT

Enter signature and date of acknowledgement.

REVIEWED BY

Before the document can be processed, the following information must be provided:

Signatures – To be signed and dated by the Training Coordinator, PMD/Classification Section, Division Chief, Deputy Director/Direct Report, and EEO Office.

Approved – To be approved and dated by the PMD/Classification Section, Division Chief, and Deputy Director/Direct Report.

BOE-1001 (S29) REV. 1 (4-04)

COMPLETION/MODIFICATION OF PLAN

If necessary, check appropriate box(es). Upon completion of the UM program or if any necessary modifications are needed, the following information must be provided:

Approved – To be approved and dated by the Employee, Supervisor, Division Chief, and Deputy Director/Direct Report. (Print names)

Signature – To be signed and dated by Employee, Supervisor, Division Chief, and Deputy Director/Direct Report.

Note:

The Upward Mobility Plan may be terminated by the manager, supervisor, or Deputy Director/Direct Report under any of the following conditions:

- Documented unsatisfactory job performance in the current assignment;
- Failure of the employee to meet personal commitments outlined in the plan;
- Separation from the BOE; or
- Unexpected change in operational needs or funding availability.

Plans that are terminated are submitted to the EEO Office for tracking purposes.

Notes