

# EOTA – Business Process



*Document Title:*

**Functional/Job/Task Analysis Process**

*Document Number:*

**ISDP-005 Rev 11\_0718**

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*Parent Document:*

**Q-001, Quality Manual**

*Notify of Changes:*

**PM2**

*Referenced Document(s):*

**ISDF-XXX** Vision User Guide (currently being developed)

*Revision History:*

| Rev.           | Description of Change   |
|----------------|---|
| <b>08_0410</b> | <b>Initial Release</b>  |
| <b>10_0630</b> | <b>Process modified to match steps within the TPP</b>   |
| <b>11_0718</b> | <b>Minor editorial changes; changed step 8.0 from Task-to-Training Matrix to “Analysis”-to-Training Matrix.</b> |
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## **I. Purpose**

To assure proper execution of the activities required to effectively complete the analysis process in response to a federal tasking to perform an analysis (i.e. functional, job, task, etc...).

## **II. Scope**

This process applies to EOTA employees responsible for facilitating, completing, or application of functional area/job and/or task analysis activities.

## **III. Responsibility**

**Program Manager (PM1)** – Responsible for initiation of analysis project and review/acceptance of Analysis Report.

**Project Manager (PM2)** – Responsible for oversight of execution of the analysis process.

**Federal Management Team (FMT)** – Responsible for review and acceptance of Analysis Project Plan (ISDF-045) and completion of associated ISDF-001, Technical Direction.

**Project Lead (PL)** – Responsible for executing and coordinating activities in support of completing the analysis.

**Point-of-Contact (POC)** – Representatives from Headquarters or field assigned to guide, support, or assist in the analysis process.

**Subject Matter Expert (SME)** – Responsible for providing or coordinating access to expert information, assisting with POC contact, verification of survey instrument, and review of process output for accuracy.

**Federal Management Team (FMT)** – Federal Manager with authority over designated program area.

#### **IV. Definitions**

**Analysis** – Evaluation of functional areas, activities, work outcomes, and/or performance requirements to identify existing or anticipated curricular, programmatic, or individual course training needs and/or recommendations for policy or process review. Analyses may be performed at the functional, job or task level depending on the depth of information requested/required within the associated ISDF-001, Technical Direction.

**Difficulty (D)** – A measure of the mental ability and motor skills necessary to perform a given task.

**Importance (I)** – The quantification of the impact of anticipated consequences if the task is improperly performed.

**Frequency (F)** – How often a task is performed in relation to the position being analyzed.

**Needs** – Traditionally defined as performance gap separating what people know, do or feel from what they should know, do, or feel to perform competently.

**Needs Assessment** – Identifies gaps in results, places them in order of priority, and selects the most important action for closure or reduction.

**Needs Analysis** – Identifies the causes of the gaps in results so that appropriate methods, means, tactics, tools, and approaches may be rationally identified and then selected for meeting the needs.

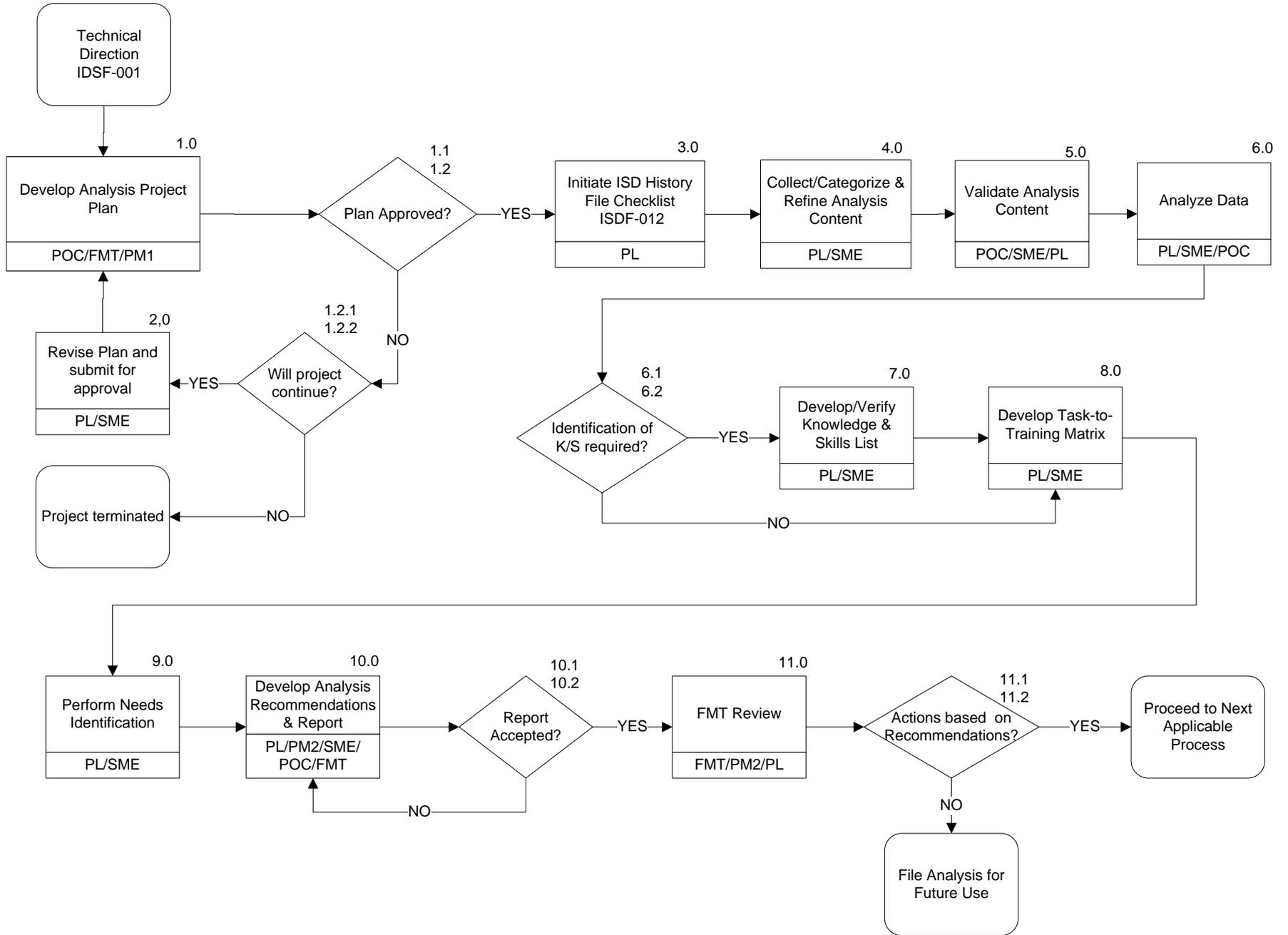
**Needs Assessment Planning** – The process of developing a blueprint for collecting needs assessment information.

**Needs Assessment Plan** – A blueprint for collecting information about instructional needs.

**Task-to-Training Matrix** – A document that correlates the job tasks identified during an analysis to the training courses developed to support that job. This matrix is developed by matching the tasks identified in a task inventory, the training recommendation assigned to the task, and the objectives developed for existing training courses identified to achieve specific tasks. This matrix is used best as a formative evaluation tool, however, the matrix can be very helpful to compare existing course material to current job needs.

**Vision database** – A data management application used for entry, consolidation, management, organization, and reporting of analysis data.

V. Process Flow chart



## **1.0 Analysis Project Plan**

The PL and SME will develop an Analysis Project Plan (ISDF-045). The plan will define required resources, a timeline, project sequence, and analysis methodology. In addition to the requested training assessment, the project may require other types of analysis. Note: It may be necessary to develop an overview summary of pre-existing analyses. A needs analysis on job/task/performance definitions or review of the impacts of new technology, evolving training techniques, future events, legislation or policy change may be necessary. The PL, with help from the SME and/or Headquarters POC, will determine areas of need that are important to this project. The strategy will be documented within the Analysis Project Plan (ISDF-045). The Project Plan will be reviewed and approved by the Project Manager (PM2), Program Manager (PM1), and the FMT.

**1.1** If the Analysis Project Plan is approved, continue to step 3.0.

**1.2** If the Analysis Project Plan is not approved, the PL, in conjunction with the SME, will revise the Analysis Project Plan and resubmit until approval is obtained or the project is terminated or placed on hold status.

Will the Project Plan be continued or will the Plan be terminated?

**1.2.1** If the Project Plan will be continued, proceed to step 2.0

**1.2.2** If the Project Plan will not be continued, terminate project as directed by PM1.

## **2.0 Revise Plan and submit for Approval**

The PL, with help from the SME, will revise the Analysis Project Plan and resubmit for approval (Step 1.0).

## **3.0 Initiate ISD History File**

The PL will initiate the ISD History File (ISDHF) using the ISD History File Checklist ISDF-012 to ensure compliance with EOTA requirements.

## **4.0 Collect, Categorize, and Refine Analysis Content**

The PL will review any previous analysis report, if applicable. Collect, consolidate, and refine content relevant to the functional area/job and/or tasks associated with the topic of the analysis. Content will be identified through research using SMEs, expert performers, job incumbents, policies, governing documents, and existing training objectives, job aids etc. The PL will refine the content into brief, clear statements within functions, duty areas or other categories appropriate to the project's goals. Content will be organized within Vision.

## **5.0 Validate Analysis Content**

The PL will identify and execute a strategy to validate the previously collected and refined analysis content. This will include validation through content surveys, interviews, focus groups, observations, etc...by respondents who will determine if the content is accurate and complete. This step will also include feedback from respondents rating each task based on difficulty, importance, and frequency of execution, as applicable. It may also include the capture/validation of information in support of the analysis goals, if applicable.

## **6.0 Analyze Data**

Analyze the Difficulty, Importance, and Frequency (DIF) data captured during Step 4.0 to identify relevant characteristics (i.e. priority, relationship to other data, consequence of outcomes, etc.) as required by the goals of the project. Analyze other data in support of the analysis goals, if pertinent.

**6.1** If identification of Knowledge and Skills (K&S) for tasks is required per the Project Plan proceed to step 7.0.

**6.2** If identification of K&S for tasks is not required per the Project Plan go to step 8.0.

## **7.0 Develop/Verify Knowledge and Skills List**

The PL will use SME's, expert performers, and/or job incumbents to identify and verify all K&S necessary to perform each identified task.

## **8.0 Develop Analysis-to-Training Matrix**

The PL will use available resources, including but not limited to, SMEs, training experts, expert performers, and/or job incumbents to compile a listing of known training resources for tasks (and K&S statements if included within the project). The objectives of pertinent training resources (including current EOTA courses) will be documented and linked to task and/or K&S statements in order to identify gaps between tasks/K&S statements and available training resources. Note: EOTA does not necessarily train the tasks because we do not own the participant, nor are we experts; however, an analysis is conducted to determine if task statements are appropriate; therefore, this is an Analysis-to-Training Matrix and not a Task-to-Training Matrix.

## **9.0 Perform Needs Identification**

Using the Task-to-Training Matrix, in addition to other applicable analysis findings, the PL will work with SMEs, training experts, expert performers, and/or job incumbents to identify what is "needed" to meet desired states, i.e. training, policy, resources, etc....

## **10.0 Develop Analysis Recommendations and Report**

The PL, with the help of the assigned POC and SME(s), will develop a written analysis report including 1) recommendations, 2) explanation of methodology and 3) documentation including outcomes from each of the analysis steps. Recommendations will include training recommendations or job-aide suggestions in response to the needs identification (Step 8.0). Recommendations in response to these needs could include position descriptions, job redesign, development of performance appraisal instruments, organizational analysis, review of policy including operational orders and procedures, operational performance tests or quality assurance projects.

The report will be reviewed by assigned POC, SME(s), PM2, PM1, and FMT.

**10.1** If training development actions or other projects are required proceed to Step 11.0.

**10.2** If the report is not accepted, return to Step 10.0 for revision and resubmission.

## **11.0 Federal Management Team Review**

The FMT will coordinate discussion between the PM2 and the PL to provide specific explanation of analysis recommendations. The FMT will provide direction regarding any action based on recommendations from the analysis report.

**11.1** If action will occur go to next applicable process or complete actions per FMT direction if no process exists.

**11.2** If action will not occur based on recommendations, analysis will be filed for future use.