



APPENDIX M

TEMPLATE—MANAGEMENT TRAINING PLAN

Instructions for completing Appendix M

As a reference, please refer to the completed sample: Appendix N

About the Management Training Plan Template

The Management Training Plan template provides you with a method to identify training sources the needed training so candidates can acquire the needed competencies and skills to function in the positions your agency has identified within their Succession Management Plan. It is suggested that you obtain training resources based on discussions with your Human Resources department and/or Information Technology department or other training resources.

Complete the following:

1. Complete an introduction statement describing the purpose of the training plan. Refer to the completed sample Appendix N as needed.
2. Complete the scope statement. Refer to the completed sample Appendix N as needed.
3. Complete the objective statement. Refer to the completed sample Appendix N as needed.
4. Identify the type of Training Sources to address your Succession Management Plan needs. Refer to the completed sample Appendix N as needed.
5. Identify and list the specific seminars, classes, workshops, and other resources available that will be used to address your Succession Management Plan needs.

IT Succession Management Plan Management Training Plan

(Template)

Month, Year

INTRODUCTION

SCOPE

OBJECTIVES

TRAINING SOURCES

➤ *External*

➤ *Internal*



APPENDIX N

SAMPLE—MANAGEMENT TRAINING PLAN

**Information Technology Services Branch
Succession Management Plan
Management Training Plan**

February, 2007



INTRODUCTION

The purpose of the training plan is to identify high level training classes that will assist potential new leaders to fill management gaps, grow the capabilities of the current leadership team, and maintain and build the intellectual capital of the organization. The focus of this training plan is geared towards IT middle and senior management.

SCOPE

These management and leadership training classes are geared towards the development of the potential leaders for the management positions identified in the ITSB Succession Management Plan (SMP). Specific technical classes should be identified by each individual based upon the Individual Development Plan and technical gaps.

OBJECTIVES

The objective of the training is to provide future leaders with the skills needed for succession into the ITSB's key management positions as identified in the ITSB SMP.

TRAINING SOURCES

ITSB has identified both external and internal classes that are suggested for staff growth. As part of the external training, two levels of competencies are required for these positions, Management and Leadership. In addition, additional classes in the areas of Human Resources, Budget, and Project Management are also required.

➤ *External*

The American Management Association (AMA) offers certificate programs that include classes in Management, Leadership, Communication, Project Management, Finance, Human Resources, and Training. For purposes of this document, AMA examples have been used. In no way does this mean that other external training organizations cannot also be used.

The Management Competency (certification) can be fulfilled by completing three of the following seminars within a 24 month period.

Management Qualifying Seminars

- Managing Today's IT and Technical Professionals
Learn how to get your IT professionals working together more efficiently and productively on project teams, groups and task forces (3 days)
- Coaching and Counseling for Outstanding Job Performance
Step-by-step approach to effective coaching and successful counseling (3 days)
- Planning and Managing Organizational Change
Prepare managers responsible for facilitating or implementing changes initiatives, identify key business drivers that typically underlie the need for change. Learn how to work with key stakeholders in ways that build support and ensure positive outcomes for your bottom line (2 days)
- Successfully Managing People
Learn the most effective methods for managing people, including dealing with difficult people, winning cooperation and trust and ensuring your people's values and your organization's goals are in sync (3 days)
- Creating a Culture of Trust: Management Strategies That Get Results
You'll evaluate your level of trust towards others, identify critical behaviors for developing positive relationships and learn specific strategies and tactics to create greater trust, repair broken trust and lead your team to optimum results (2 days)
- Developing Executive Leadership
Combines proven-in-action techniques with peer interaction and insights from the latest research to help you master the competencies of effective executive leadership (3 days)
- Improving Your Managerial Effectiveness
You will learn the importance of team dynamics and how understanding others—their goals and values, needs and wants, comfort and stretch areas—can lead to more effective managerial effectiveness through motivation, delegation, conflict resolution and overall team performance (3 days)
- Moving from an Operational Manager to a Strategic Thinker
Offers key insights and ideas into the core skills of strategic thinking as well as actionable steps. You will become a valuable strategic thinker, an innovator, a persuasive player and a champion for change who adds value to your organization, your customers and your stakeholders (2 days)
- Mastering Organizational Politics, Influence and Alliances
Presents a sophisticated approach to managing that reveals the hidden truths about management success today (2 days)

The Leadership Competency (certification) can be fulfilled by completing three of the following seminars within a 24 month period.

Leadership Qualifying Seminars

- The Voice of Leadership: How Leaders Inspire, Influence and Achieve Results

Designed to strengthen your leadership communication skills. You'll learn practical techniques to shape your leadership messages hone an authentic leadership voice and engage in powerful conversations that achieve results (3 days)

- Leadership Skills and Team Development for IT and Technical Professionals

Learn how to build and lead a team. Evaluate your team's performance and develop an action plan for continued leadership success (3 days)

- AMA's 5-Day "MBA" Workshop

This accelerated, 5-day "MBA" presentation surveys the core curriculum covered in most university-level graduate business programs. You will acquire knowledge that will provide you with a strong overall business foundation, you will discover how various components of a business must be linked, aligned and integrated into a successful business system. You will also gain a firm grasp of modern management practices (5 days)

- Advanced Leadership Communication Strategies

This course is for experienced leaders determined to achieve even greater success at the highest levels of their organizations (3 days)

- Advanced Strategic Planning and Implementation

This comprehensive seminar covers defining external and internal influences on strategy to ensuring alignment during implementation (2 days)

- AMA's Advanced Executive Leadership Program

You'll understand what makes a leader, the practices and commitments of effective leadership, how to shape organizational excellence, which global competencies are critical to success today and how to gain personal mastery of your own leadership (3 days)

Other training classes required are Human Resources, Finance, and Project Management.

Human Resources

- Recruiting, Interviewing and Selecting Employees

This course will take you step-by-step through the employee selection process, from recruitment through hiring, with actionable advice for improving your interviewing skills (3 days)

Finance

- Fundamentals of Finance and Accounting for Nonfinancial Managers

Overview of finance for non-financial managers, from accruals to write-offs to receivables and payables, this workshop shows non-financial managers the concepts, tools and techniques that can help make each decision pay off—on the job and on the bottom line (3 days)

- AMA's Finance Workshop for Nonfinancial Executives

Individuals who need a background in the principals of corporate finance (4 days)

Project Management

- Information Technology Project Management

Discover how to optimize IT development and delivery processes so that you can bring every information technology project online more effectively, more quickly and on budget (3 days)

The link to the AMA's website is: <http://www.amanet.org/>

In addition to the external training stated above, CalPERS has developed an internal leadership development framework that includes the programs described below.

➤ **Internal**

ITSB will partner with the Human Resources Services Division (HRSD) to utilize the three programs listed below which will assist ITSB in identifying the existing skills of current staff, understanding their desired career paths, and initiating the training process to fill any skill gaps.

1) 360° Leadership Feedback

Using a confidential web-based survey - direct reports, peers, bosses, and customers can provide feedback to a leader on 13 leadership categories. Through this feedback, CalPERS managers and supervisors gain a level of self-awareness. The program enables leaders to work with a coach for a period of one year to develop leadership goals and actions plans which promote work effectiveness through self-awareness and honest communication.

2) Leadership Skills Assessments Program

The Leadership Skills Assessment (LSA) is a development activity which helps in the evaluation of managers' readiness to lead. Managers identify their strengths, weaknesses, and requested career paths. A leadership group then discusses and evaluates each participant to rate his/her readiness to lead and identifies the experience/training necessary for the participant to become a viable leader. At the completion of the LSA program, leaders should enhance their executive/management development through on-the-job experiences, management reassignments, and training programs.

3) Leadership Acceleration Workshops

The Leadership Acceleration (LA) Workshop is a three-day workshop designed to increase team building and leadership skills among Division Chiefs, Assistant Division Chiefs, Staff Services Manager III and equivalent classifications.

Participants will be introduced to a "Strategic Thinking and Results" process" (STAR). The STAR is a proven methodology, used successfully at other industry-leading organizations during the past two decades to strengthen capability, consistency, rigor and discipline in business analysis, communication, and decision making.

In addition to the three programs above, CalPERS also offers the following resources:

Leadership Resources Website

CalPERS recently developed a website to address the need to help develop career potential for leadership positions. This website has various resources to influence, motivate and enable others to contribute toward the effectiveness and success of CalPERS and help government managers cultivate a more effective and motivated public sector workforce.

The link to this new Leadership Resources Website is:

<http://insider.calpers.ca.gov/leadership-resources/default.asp>

Leadership Development Events

In addition there are Leadership Development events designed to assist CalPERS' leadership in connecting their work with CalPERS vision and strategic objectives as well as educating leaders on their role within CalPERS continually evolving culture:

Annual Leadership Forums

These forums are intended to bring CalPERS leadership team-including executives, division chiefs, managers, and supervisors-together each year to provide an opportunity for them to hear from external speakers and CalPERS senior and executive management.

Quarterly Leadership Events

These events provide managers and supervisors access to the CalPERS Chief Executive Officer, Fred Buenrostro, on a quarterly basis. Additionally, the sessions offer managers and supervisors opportunities to discuss trends and issues facing the organization and network with peers, senior managers, and executive officers.

Coaching and Mentoring

In addition, coaching and mentoring will be performed on an on-going basis by the ITSB senior management and executive team.