

ASTD 2010 International Conference & Exposition

Chicago, Illinois, USA

SAND2014-1300C

M309 - Handout

Education Transformation for Results: A Sandia National Laboratories Case Study

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Objectives

- Identify and align strategic goals and imperatives in corporate education with executive management as owners of transformation.
- Set expected goals and outcomes of a transformed corporate education process and establish an evaluation model to measure success.
- Apply transformational best practices from a Sandia case study of the strategic education and university programs initiatives to your corporate education process.

Sandia Lab Case Study

I. Background (www.sandia.gov)

- A. **Mission:** Provide exceptional service in the national interest. Develop science-based technologies in support of national security that solve national and global threats to peace and freedom.

Missions: *nuclear weapons security; nonproliferation; homeland security; energy & infrastructure assurance; defense systems & assessments; science, technology & engineering.*

Sandia Lab Case Study

I. Background (facilitator-led exercise)

B. What is the real problem? 5WsModel:

Who: Sandia management, employees, human resources; external university partners

What: finding, developing & retaining the right talent, with the right values, education & skills

When: 2004 +

Where: Sandia National Laboratories, Albuquerque, NM

Worth: Mission-essential

Sandia Lab Case Study

I. Background

C. Vision/Opportunity:

Sandia's vision is to be a laboratory with:

1. an exceptional workforce & leaders, continuous learning;
2. industry and academia strategic partnerships; and
3. people do their best work & the Lab is the employer of choice.

Guiding principles from Tom Hunter, CEO

1. Transform early service years into a time of development.
2. Create a learning environment enhancing insight & potential.

Sandia Lab Case Study

I. Background

The opportunity moving forward:

- A. Strategic Education Committee: 2004
- B. World Class Workforce Strategic Assessment: 2007
- C. University Programs: 2009

Sandia Lab Case Study

II. Process and Deliverables

A. Strategic Education Committee: Checklist

Focus: What should be done to re-establish our continuous learning culture?

Committee Charter Checklist

- Establish the purpose
- Identify committee leadership and members
- Determine roles and responsibilities
- Determine recommendations committee will make
- Executive approval

Strategic Education Committee Charter Checklist

Sandia Case Study

Step 1: Establish the purpose

What will the committee accomplish?

Sandia National Laboratories is committed to the goal of having a continuous learning environment that enables its workforce to remain the 'best of the best' in support of our national mission.

Continuous education is essential to enhance employee job and mission-related knowledge and skills and contribute to employee professional growth and use of critical thinking.

The Strategic Education Committee (SEC) is chartered to develop and advocate actionable strategies to assist Sandia in meeting its strategic goals for continuous improvement.

Strategic Education Committee Charter Checklist

Sandia Case Study

Step 2: Identify committee leadership and members

Leader criteria:

- Decision-makers
- Owners of the process and outcomes
- Key stakeholders
- Highly respected, credible leaders in the enterprise

Leadership: (Chair) Jerry McDowell, Vice President
(Team Lead) David Williams, Director

Reports to: Deputy Laboratories Director and Chief Operating Officer
This committee will focus on education and learning for Sandia. This committee will not focus on mandatory/compliance training.

Strategic Education Committee Charter Checklist

Sandia Case Study

Step 3: Determine Committee roles/responsibilities:

1. Takes the leadership position in establishing strategic goals for education and continuous learning.
2. Acts as champions to reinvigorate the learning environment at Sandia.
3. Promotes professional development.
4. Recommends guidance for continuing, well-planned, strategic investment in corporate education.
5. Clarifies educational-related institutional objectives.
6. Maintains corporate momentum necessary to continue the education mission.

Strategic Education Committee Charter Checklist

Sandia Case Study

- Step 3: Determine Committee roles/responsibilities:** (continued)
- 7. Monitors Sandia's education portfolio to ensure alignment with strategic direction.
- 8. Stewards the vision for all Sandians for career and professional growth through corporate education programs.
- 9. Works with Corporate Learning and Professional Development (CLPD) to identify educational standards.
- 10. Sets strategic direction for CLPD.
- 11. Establishes strategies and provides direction on new technical areas where education programs are needed.

Strategic Education Committee Charter Checklist

Sandia Case Study

- Step 4: Determine recommendations committee will make:**
 1. Provides assistance to Corporate Learning & Professional Development (CLPD) to establish a program that meets the Lab's technical and organizational needs.
 2. Identifies and recommends solutions to minimize barriers and challenges to meeting expectations.
 3. Provides suggestion and guidance to CLPD, setting goals and monitoring progress.
 4. Recommends future policy changes, key strategic education areas, and budget alignment.

- Step 5: Executive Approval**

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II. Process and Deliverables

A. Strategic Education Committee

Lesson 1: Time spent developing a Charter statement & assuring its congruent understanding is time very well spent.

Lesson 2: Approach - it is hard for top executives to say “No” to zealots who haven’t asked for much (\$).

Lesson 3: Top executives support those things that make a difference and can prove it with data (business case).

Sandia Lab Case Study

II. Process and Deliverables

B. World Class Workforce Assessment - 2007

Executives commissioned this strategic issues team to realize its vision of an exceptional workforce.

Lesson 4: The most successful transformational activities need to remake themselves periodically to attract and retain executive support.

Lesson 5: A learning culture must be framed as part of a larger strategy for an enterprise's workforce to sustain itself.

Sandia Lab Case Study

II. Process and Deliverables

B. World Class Workforce Assessment – 2007:

Team Checklist

- Identify the opportunity
- Identify critical issues and concerns
- Determine Champion's guiding principles
- Clarify team's scope
- Specify team outcomes
- Determine criteria for finalizing the Actionable Strategy
- High level approach
- Team members and assignments

World Class Workforce Strategy

Team Checklist – Sandia Case Study

□ Identify the Opportunity

During the 2007 spring Laboratory Leadership Team Strategic Planning meetings, “World Class Workforce” was defined as a strategic issue for Sandia.

A team was established to deliver an articulated and actionable strategy to ensure that Sandia provides extraordinary talent and has the world-class workforce needed for future mission success.

World Class Workforce Strategy

Team Checklist – Sandia Case Study

Identify critical issues and concerns

1. There is an increasing need for a more agile and effective workforce;
2. There are fewer U.S. citizens graduating in the necessary science, technology and engineering degrees;
3. A national security lab requires a globally informed, engaged, and competitive work force while maintaining the highest standards of information and operational security. To be successful, our diverse work force must successfully integrate foreign nationals who are enabled to make substantial contributions;
4. The quality of staff being hired is not sufficient to meet long-term leadership and mission needs;

World Class Workforce Strategy

Team Checklist – Sandia Case Study

□ Identify critical issues and concerns (continued)

5. The national debate regarding national security strategies including nuclear technologies and policies has made it more difficult to attract and retain top talent;
6. We are losing too many staff within the first 5 years of employment;
7. Our current workforce strategy is based on our business strategy from decades ago and may be outmoded for today's business needs;
8. We must have a new and more assertive approach to selecting, developing and deploying our people not only for Sandia but across the national security complex.

World Class Workforce Strategy

Team Checklist – Sandia Case Study

□ Determine Campion's guiding principles:

1. Be the recognized leader in the nation for innovation and creativity in undergraduate and graduate science and engineering education.
2. Uniquely align our hiring needs with strategic workforce capability needs.
3. Transform the early service years into a period of alignment, development, corporate awareness, and foundation for personal career development.
4. Create a learning environment that enhances a person's insight and potential.
5. Identify candidates and existing employees for leadership attributes; develop them to be our future leaders.
6. Establish all people systems and processes around the simplest, appropriate approaches, providing a self-consistent set of policies and guidance boundaries.

World Class Workforce Strategy

Team Checklist – Sandia Case Study

Clarify Team's Scope

1. This strategic initiative will be predicated on our best understanding of *business strategies*.
2. The deliberations of this team will focus on the Science, Technology, and Engineering workforce and, as applicable, will include the operations workforce.
3. The study will take a holistic approach and consider how we will leverage other elements of the workforce to achieve mission objectives (e.g., support functions; contractor workforce; etc.)
4. The scope will include all five elements (potentially to different degrees) of the “World Class Workforce” vision described by Tom Hunter, the Executive Office champion, and prioritize recommended actionable strategy.

World Class Workforce Strategy

Team Checklist – Sandia Case Study

□ Clarify Team's Scope (continued)

5. The team will leverage any related studies/efforts underway. If any activities are found to be inconsistent with the direction of this strategic initiative, the team will demonstrate leadership and connect with the activity owner(s) to discuss concerns and the need for possible redirection.
6. Resource requirements will be defined for all recommendations.
7. The team's efforts will focus on strategy, not HR policies or processes.

World Class Workforce Strategy

Team Checklist – Sandia Case Study

❑ Team Outcomes

The recommendations are intended to create a plan for how Sandia develops a world class workforce. The study will deliver an articulated and actionable Lab strategy focusing on the five elements that foster selection, development, deployment of such a world class workforce.

1. Priming the Pump

2. Selecting the Best

3. A New Beginning: Each new employee is provided a transformational experience that inculcates our culture, values, and ethos resulting in alignment of purpose, skills development, enhancement of corporate awareness, and a foundation for sustainable career contributions.

World Class Workforce Strategy

Team Checklist – Sandia Case Study

Team Outcomes (continued)

4. **An Enriched Career:** Each employee expands her or his knowledge and experience base in an environment that encourages learning, informed risk-taking, and mentoring. Career enrichment begins with each employee owning his/her development goals, then continues through regular feedback, support from a variety of co-workers, and revisions to those goals over time. Career satisfaction (as measured by employee survey) is the metric for monitoring this element.

World Class Workforce Strategy

Team Checklist – Sandia Case Study

Team Outcomes (continued)

5. **Choose to Lead:** Each employee is selected and provided the experience and training to further develop their principle-based values, innovation, courage, and sense of purpose to be successful leaders in our national security mission. Our hiring practices, evaluation, mentoring, and assignment selections are aligned to enrich and encourage the development of our future leaders.

World Class Workforce Strategy

Team Checklist – Sandia Case Study

- Determine criteria for finalizing the Actionable Strategy:**
 - 1. Priority is given to recommended actions which will have the greatest impact on mission success.
 - 2. Which actions are “reasonably achievable”? Where do we have the highest energy as a team?
 - 3. Issues that have the biggest gap, with respect to the “current v. desired” state at Sandia.

World Class Workforce Strategy Team Checklist – Sandia Case Study

□ High Level Approach

Phase 1 -- “Homework” (December 2007 – January 2008)

Understand the business strategies and how these translate to Sandia’s workforce strategy. Understand the efforts of other Strategic Initiatives and cross connections with the World-Class Workforce issue. Prioritize actions within each of the five elements for further definition and scoping.

Phase 2 – Drill Down on Each Element (February – May 2008)

Each element is assigned to a team member, who will guide team discussion on that element to include: inventory of efforts already underway, strategic questions pertinent to or driven by that element, general brainstorming, and formulating recommendations for actionable strategies.

Phase 3 – Recommendations/Actionable Strategies to the Executive Champion and Executive Management (June – July 31, 2008)

World Class Workforce Strategy

Team Checklist – Sandia Case Study

□ Team Members and Assignments

Executive Office Champion: Tom Hunter, CEO

Vice President Owner: VP of Human Resources

Director Members: David Williams and six other directors

Support Members

Team assignments for the five strategy elements will be supplemented by subject matter experts to assist with data collection and analysis, as needed.

Sandia Lab Case Study

Workforce GAPS Job Aid Exercise (facilitator-led)

<u>Category</u>	<u>From</u>	→	<u>To</u>
• View of Sandia	mixed messages		brand name recognition
• Recruiting	we find the best		the best seek us out
• Leadership	time on daily ops		engage national agenda
• New staff	get my task done		deliver impact
• Management	local focus		talent management
• Work-environment	compliance driven		empowered, innovative
• Culture: new staff	5 years to learn values		assimilation process
• University Program	credentials focus		business & performance driven

WORLD CLASS WORKFORCE

FROM – TO TABLE JOB AID

Sandia Case Study

Category	From	To
View of Sandia, external	Mixed messages about being a research institution, as a contractor (job shop); confusion about why we do some of what we do	Unique institution working the hardest national security problems; transforming the nuclear weapons complex; brand name recognition
View of Sandia, internal	Confusion about who we are and what we do	Clarity on who we are and what we do; operationally effective and efficient

WORLD CLASS WORKFORCE

FROM – TO TABLE JOB AID

Sandia Case Study

Category	From	To
Recruiting new employees	We have to go find the best	The best seek us out and compete to work here
Leadership	Spending too much time in care and feeding of daily operations	Engaging the national agenda; operations are kept on course through robust, simple processes; spend less time on keeping everything on course

WORLD CLASS WORKFORCE

FROM – TO TABLE JOB AID

Sandia Case Study

Category	From	To
Preparing leadership	Inadequately addressed	More active preparation of future leaders through “acting” positions
New staff first experiences	Feel trapped and feel like “I just have to get my task done.”	Feel “lucky to be here” and like “they want me to deliver impact but they also want me to be a part of a bigger whole”. Need to have a project mgt experience within first 1-2 years. Have the potential to lead the Lab in the future. OK to have competing ideas

WORLD CLASS WORKFORCE

FROM – TO TABLE JOB AID

Sandia Case Study

Category	From	To
1 st level managers	Overwhelmed. Tendency to “roll your own” with regard to requirements, i.e., ignore or invent requirements.	Confidence in alignment between haws and what’s (don’t have to keep inventing it); not making daily corrections to operational issues
Senior managers	Focused on localized environment and localized hiring	Key to lab future; managing managers is recognized as different from managing staff. Use “acting” positions as opportunity for growth

WORLD CLASS WORKFORCE

FROM – TO TABLE JOB AID

Sandia Case Study

Category	From	To
Work environment	Compliance focused, timecard driven. “Got to get it done” mentality.	Clarity on what must be done to adhere to requirements and get the routine out of the way, “15% innovation time” to explore new ideas (3M model). Employees know and believe that they have the opportunity to expand their thinking and are part of “something bigger.” Latitude exists to call some shots and to be accountable. Candidates seek to find us as an employer. No “second-class citizens”; everyone is respected and honored.

WORLD CLASS WORKFORCE

FROM – TO TABLE JOB AID

Sandia Case Study

Category	From	To
Culture	<p>Takes 5-6 years for new folks to develop sense of Sandia (strong work ethic, dedication to national service). We are currently running on inertia. Everyone finds his/her own way</p>	<p>There is an assimilation process so employees know why they're here and what Sandia stands for</p> <p>Empowered employees and explicit, intentional exposure to work ethic and national service expectations. All values discussed regularly.</p> <p>Investment in people's growth and development.</p> <p>There is a higher proportion of people who are identified as poor matches for Sandia and that's ok—leaders do something about those who don't fit.</p>

WORLD CLASS WORKFORCE

FROM – TO TABLE JOB AID

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Category	From	To
Dealing with conflict	Not dealt with constructively	Competitive ideas nurtured and clear decision authority is exercised regarding path forward. Clarity on who has decision authority.

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World-Class Workforce Team Recommends Four Key Actionable Strategies



#1: Plan and assure competitive work and high-quality work environment.

#2: Energize the Sandia brand: establish and actively communicate the Sandia identity (internally and externally).

#3: Attract the best for all of Sandia.

#4: Acculturate the new; enrich the career; and grow leaders.

Sandia Lab Case Study

II. Process

C. University Programs Assessment – 2009

CEO commissioned an independent, internal assessment of Labs' University Programs

- Line-led assessment of education programs, university relationships & recruiting, and research alliances
- Focus on value to Mission Success
- Data-driven assessment with high subject matter expert involvement

Sandia Lab Case Study

II. Process and Deliverable

C. University Programs Assessment 2009: (checklist)

- Purpose
- Proposed team outcomes
- Scope
- Team Composition
- Key Milestones and Schedules
- Communication Plan
- Resource Needs

University Programs Strategic Assessment Team

HIGH-Level Plan Checklist

Sandia Case Study

Background

University-Based Education Programs were originally established to assist employees with maintaining and developing professional skills and competencies that contributed to supporting and attaining mission success.

Purpose

The Executive Office has commissioned an internal, independent assessment of the Labs' University Programs. The team will assess the programs'

- alignment with Sandia's strategic intents,
- process alignment with corporate policies, and
- management controls of operations.

University Programs Strategic Assessment Team

HIGH-Level Plan Checklist

Sandia Case Study

❑ Proposed team outcomes

- Understand
 - Laboratories' Strategic Intents
 - Purpose of University Programs
 - University Programs' Management Measures and Controls
- Review
 - University Programs and Procedures
 - Education Programs at other DOE Labs and LMC
- Identify and Consider Improvement Opportunities
 - Campus Executive Schools
 - Diversity Outreach Committees and Networking Groups

University Programs Strategic Assessment Team

HIGH-Level Plan Checklist

Sandia Case Study

Proposed team outcomes

- Identify Constraints
 - Doctoral Study Program's Federal Acquisition Regulation Issue
 - Program Completion Requirements
 - SDP Committee Structure and Composition
 - Non-Exempt/Exempt Candidacy Requirements
- Recommend
 - University Program Improvements
 - Actions to Resolve or Mitigate Constraints

University Programs Strategic Assessment Team

HIGH-Level Plan Checklist

Sandia Case Study

Scope

University Programs activities as managed by Corporate Learning and Professional Development in accordance with Sandia's Corporate Policies and Procedures.

The team will meet seven (7) times during 2nd Qtr 2009 four hours each time. The team will continue to meet annually to ensure programs are on track and/or to recommend adjustments as appropriate.

University Programs Strategic Assessment Team

HIGH-Level Plan Checklist

Sandia Case Study

Team Composition

A corporate cross-functional team composed of line entity representatives from across the Labs is established.

- Team Champions: 2 Line Vice Presidents
- Team Lead: David Williams, Director
- Subject Matter Experts
- Co-Facilitators
- Line Membership
- Advisory Groups: Special Degree Programs Committee, World Class Workforce Strategic Issues Team, Strategic Education Committee, Recent and current SDP participants, ST&E Strategy & University Research, Executive Diversity Council, Staffing, Corporate Contract Management

University Programs Strategic Assessment Team

HIGH-Level Plan Checklist

Sandia Case Study

Key Milestones and Schedules

09 Feb 2009 – Team formation meeting, Champions' Charge and Charter
Ratification and review Sandia Strategic Intents

16 Feb 2009 – University Programs and University Research Briefings

09 Mar 2009 – Determine desired “to be” through gap, SWOT analyses.

06 Apr 2009 – Identify concerns, constraints and candidate mitigations

13 Apr 2009 – Develop recommendations, action options and
Communication Plan

27 Apr 2009 – Report to Champions and determine next steps

11 May 2009 – Final products for Champions to deliver to Executive
Office

Communication Plan

Resource Need

Sandia Lab Case Study

II. Process and Deliverable

C. University Programs Assessment - 2009

- Findings
 - There is not alignment with strategic intents
 - There is process alignment with Policy
 - Management controls are ineffective
- Concerns
 - Erosion of the learning culture
 - Without workplace support, the University Program will not produce expected business results.

Sandia Lab Case Study

II. Deliverable

C. University Programs Assessment – 2009 (Checklist)

- Key Observations
 - Lack of Mission Success focus
 - Waning line support
 - Confusion among program elements
 - Lack of leverage among education, recruiting, and university relationships programs
 - Relationships with “local” universities not strategically managed
 - Unable to measure ROI or Mission Success impact
 - Substitute “individual achievement” metrics for “ROI”
 - Ineffective preparation, coaching & mentoring of participants

Our Path Forward

Requires Line of Business, HR, & Line Entity Partnership



Observations and Recommendations

Observations	Recommendation
<ol style="list-style-type: none">1. Lack of mission focus2. Waning Line support3. Confusion among program elements	<ul style="list-style-type: none">• View and manage University Program elements as a system of offerings.• Strengthen alliance between HR, Lines of Business and line entities• Establish strategic integration authority and accountability clearly define, manage and implement the different parts of the UP suite for mutual benefit• Fund and manage each interdependently with the “End in Mind”

Observations and Recommendations

Observations	Recommendation
4. Lack of coordination/leverage among program elements	Establish strategic integration authority and accountability for University Programs, Campus Executive Program, and University Partnerships.
5. Relationships with local universities are not managed with strategic capabilities.	Develop and foster partnership programs with local institutions. (e.g. faculty-staff joint recruiting & appointments, joint chairs, research projects, curriculum input).

Observations and Recommendations

Observation	Recommendation
6. Unable to measure the return on investment or measure the impact on the mission	<ul style="list-style-type: none">• Institute a Division management control process in which ...• Division analyzes SMU forecast to define needed skills and capacity enhancements sought in UP participants and builds a scorecard of metrics.• Division nominates participants based on perceived likelihood of success with regard to these desired skills enhancements.• Division assigns a sponsor/mentor to each participant.• Each participant develops a measurable impact statement with their Division sponsor prior to participation.

Observations and Recommendations

Observation	Recommendation
7. Substitute “individual achievement” metrics for “ROI”	<ul style="list-style-type: none">• Sponsor/mentor reports quarterly mentoring & progress checks to<ol style="list-style-type: none">1. measure progress toward intents,2. remind participant of the expected mission advantage, and3. reinforce SNL’s values while participant is away from the Lab• Division annually reports measured impact on its business against this scorecard to CL&PD over life of the sponsor’s impact agreement.

Sandia Lab Case Study

II. Process and Deliverable

C. University Programs Assessment - 2009

Three strategies to drive a learning transformation: checklist

- Key Strategy 1: Establish continuous learning as a value
- Key Strategy 2: Enterprise System enable Sandians to demonstrate a zeal for continuous learning and skills improvement
- Key Strategy 3: Have a simple education framework

University Programs Strategic Assessment Team

HIGH-Level Plan Checklist

Sandia Case Study

- Establish key strategies*
- Describe key strategies*
- Identify thrusts or actions required to implement each key strategy*

Key Strategy 1 - Establish continuous learning as a value at Sandia.

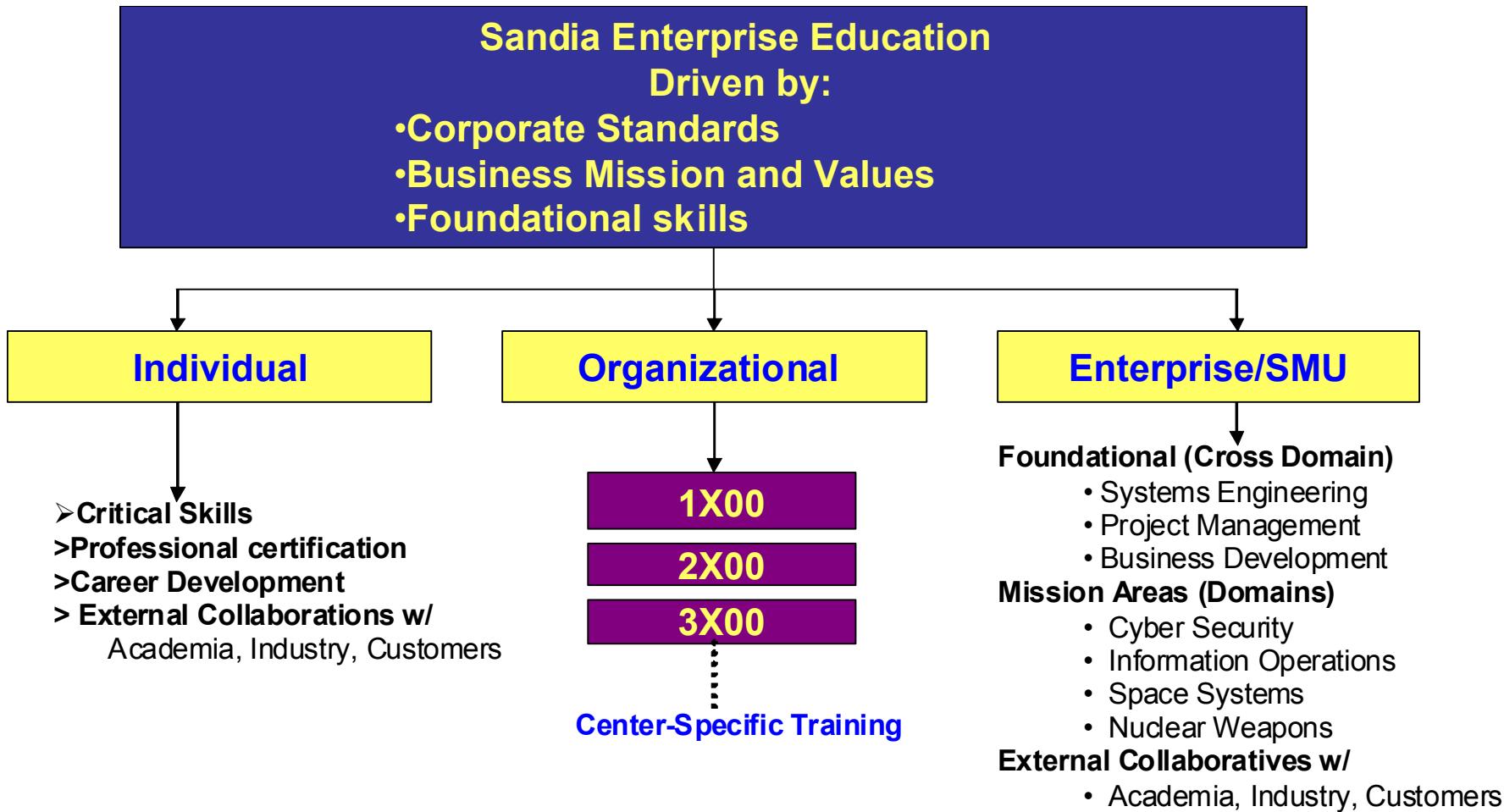
Description:

- The key objective of this strategy is to inculcate a culture of learning in every facet of Sandia's operations as well as in every person at Sandia.
- Educational responsibility must be owned and valued by both the institution and the individual. Individuals at all levels must see themselves as both students and educators.
- The three distinct levels of responsibility for establishing this culture are the Individual, the Organization, and the Enterprise/Business Unit.

University Programs Strategic Assessment Team

HIGH-Level Plan Checklist

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Strategic Education Committee

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Key Strategy 1 - Establish continuous learning as a Value at Sandia (continued)

Thrust 1A: Develop a new line item for a landmark educational facility. Result will be a more efficient, cost effective operation and use of resources with a positive return-on-investment at the individual, organizational and corporate levels.

Thrust 1B: Articulate and socialize the need for continuous education as a way of life at Sandia. Create a culture that continuing education is expected throughout one's career. Establish an expected standard of 32 hours per year for each employee.

Strategic Education Committee

Final Strategy Document Job Aid

Sandia Case Study

Key Strategy 1 - Establish continuous learning as a Value at Sandia (continued)

Thrust 1C: Work with Division VPs and Center Directors to introduce them to the concept of Organizational Learning and encourage them to undertake the task. Work to ensure that all executive management at Sandia has the same common philosophy, provide for management support, and success metrics for the three levels of learning.

Thrust 1D: Work with business units to introduce them to the concept and encourage them to undertake the task of providing a common framework for Enterprise/Business Unit learning.

Strategic Education Committee

Final Strategy Document Job Aid

Sandia Case Study

Key Strategy 2: Assure that our Sandia Enterprise System enables our people to demonstrate a zeal for self-improvement, new knowledge, experiences, and challenges; regularly creating and capitalizing on learning opportunities; displaying intellectual curiosity.

Description:

- The business rules, policies, practices, and other signals (enterprise constructs) reinforce a Learning Culture for all Sandians. Wherever an enterprise construct either refers to learning (Education, Training, etc.) or has implications for learning, it provides learning encouragement for all Sandians.
- Provide a means for any gaps, conflicts, detractors, or omissions in our enterprise constructs to be addressed.

Strategic Education Committee

Final Strategy Document Job Aid

Sandia Case Study

Thrust 2A: Develop self sustaining mechanisms to assess how well our enterprise enable a Learning Environment, remove any barriers of learning value, and acknowledge and reward learning.

Thrust 2D: Complete the rollout of full spectrum leadership in the Performance Management process linked to development plans for every Sandian. Establish clear communication on the key actions needed to demonstrate a Learning Orientation that include: seeks learning activities, maximizes learning, and takes risks in learning.

Strategic Education Committee

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Key Strategy 3 (Process): Have a Simple Education Framework

Description: Assure the framework for Sandia's education program is user friendly and clearly supports our goal of continuous learning at the laboratory. The framework will:

- Show the alignment of program offerings with laboratory, business and individual education goals;
- Ensure the education program policies are transparent and easy to understand by all employees; and
- Enable employees by providing a user friendly environment to view education offerings and learning opportunities in a simple, organized way.

Strategic Education Committee

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Key Strategy 3 (Process): Have a Simple Education Framework (continued)

Thrust 3A: Improve education process framework

- Review current learning framework against the SEC strategic plan.
- Determine common needs of employees by September, 2009.
- Determine and prioritize upgrades and/or enhancements
 - Determine timeline, implementation owners
 - Implement enhancements
 - Get feedback on upgrades and implement changes as part of a yearly continuous improvement cycle

Strategic Education Committee

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Key Strategy 3 (Process): Have a Simple Education Framework (continued)

Thrust 3A: Improve education process framework

- Improve link to education offerings with strategic partners
 - Work with partner universities, etc. on joint offerings
 - Address recommendations of internal university programs assessment
 - Integrate education opportunities offered through other Sandia efforts

Strategic Education Committee

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Key Strategy 3 (Process): Have a Simple Education Framework (continued)

Thrust 3B: Communication Plan

- Develop a lab communication plan that reflects vision, policy, processes and includes:
 - Expectation for continuous learning
 - Alignment with laboratory goals and strategic thrusts
 - Responsibility at the corporate, business and individual level
 - How to take advantage of the program
- Roll out communications
 - Engage executive management in communication
 - Provide communication materials, including streaming video

Sandia Lab Case Study

II. Process and Deliverable

C. University Programs Assessment - 2009

Lesson 6: Assessments of education program effectiveness are best done by a team - HR specialists who facilitate it and business entities most dependent upon the skills of the workforce.

Lesson 7: The Triad of our learning and educational program success is composed of Human Resources professionals, business and line entity leadership, and Lab senior executives.

Sandia Lab Case Study

II. Process and Deliverables

D. What's going on Today...2010?

Why have we gotten away from continuous learning?

1. We thought we could “outsource” learning programs to Human Resources. We can’t. A line and HR partnership is needed.
2. The “continuous” in learning requires senior executives to set expectations and the means to achieving them.
3. Be careful what you measure and how you define success.

What needs to be done to re-establish it?

4. Never underestimate the power of a band of zealots.

Sandia Lab Case Study

III. Evaluation

A. Evaluation Model

- Phase 1: observed or perceived value
- Phase 2: skills, knowledge & task proficiency
- Phase 3: improved employee loyalty
- Phase 4: improved customer loyalty
- Phase 5: impact on project effectiveness and efficiency

Sandia Lab Case Study

III. Evaluation: “a work in-progress”

A. Evaluation Model

Sample Metrics:

- Phase 1: perceived value (PV) in how tasks are performed leading to observed efficiency and productivity: *testimonials*.
- Phase 2: improve skills, knowledge, task proficiency: *test scores, performance assessment, employee survey ratings*
- Phase 3: employee loyalty measured by *increased retention, referral behaviors, innovation/creativity behaviors, results*

Sandia Lab Case Study

III. Evaluation: “a work in-progress”

A. Evaluation Model

Sample Metrics:

- Phase 4: improved customer loyalty: *repeat buying (\$), share of wallet, referrals*
- Phase 5: results, individual and business. Individual: *new outcomes produced*; Business: *budget targets achieved, cost savings, project results exceeded, cost benefit*

Sandia Lab Case Study

III. Evaluation Model: Evaluation Exercise

Given a current or anticipated learning transformation initiative:

1. Which evaluation phases do you think your client will find of potential value?
2. Which phases would you recommend? Why?
3. What key points would you use to sell your recommendation to the client?

Sandia Lab Case Study

III. Evaluation: “a work in-progress”

B. Indicators of Value to date:

Phase 1: Executive management perception of value; commitment

Phases 2-5: Pending; based on education transformation process and program implementation

Sandia Lab Case Study

Reflection:

1. Success requires the courage of a zealot tempered with the patience of a monk.
2. Human Resource organizations become empowered when they seek line leadership and create a steadfast focus on Education Transformation's strategic business imperatives.
3. There is no substitute for executive ownership, clarity of vision, and management accountability at all levels
4. Sustainment of transformation is assured through measurable results that are a combination of human performance metrics and business "bottom line."
5. The education process must be aligned with business processes and a supportive workplace to optimize results.

Sandia Lab Case Study

Questions?

Thank you for attending this session – call or email us with follow up questions or comments.