Office of Inspector General
Department of Housing and Urban Development

Administrative Support Training Matrix

SUCCESS

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OVERVIEW/EXECUTIVE SUMMARY

Background

- The HUD Office of Inspector General (OIG) made a commitment to its employees (through its Diversity Liaison Group) to enhance development of and training opportunities for OIG support staff.
- The Administrative Support Training Matrix (ASTM) was developed as a tool for meeting this commitment and to provide a roadmap for training that will make employees more proficient in their current positions and enhance their potential for promotion.
- Occupational coverage (GS grades 4-8): Investigative Assistant-Steno (Series 303), Investigative Assistant-Typing (Series 303), Office Automation Assistant (Series 326), Office Automation Clerk (Series 326), Program Assistant-Office Automation (Series 303), Records Management Assistant-Typing (Series 303), and Secretary-Office Automation (Series 326).

Matrix Description

- Built around five groups of skills – office skills, computer skills, communication skills, management skills, and mission-related skills – that each OIG administrative support staff employee needs and the types of training that will help them develop the competency to perform their jobs in a high quality manner.
- Uses the common and overlapping qualifications, skills, career paths, and other dimensions of these occupations to construct a tool for developing a cadre of support employees within the OIG who are able to contribute to the successful performance of its mission, strategies and goals.
- Identifies training by three levels – entry level, intermediate/advanced entry level, and full performance level, to include refresher training, state-of-the-art innovations added to the positions, and other appropriate enhancements.
- Establishes, as guidelines, two priority designations, "R" (required) and "O" (optional). Actual training needs may vary based on each employee's experience, education, and training.
- Includes a list of potential training sources.
- Includes a tool, the **Training Log,** to help supervisors and employees identify individual employee training needs.
- Includes a set of talking points to help supervisors implement the matrix with their employees.

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Why Use This Matrix

- Provides supervisors and their employees with a single-source reference to assist in determining appropriate training that will prepare employees for full roles in the performance of their duties in the OIG.
- Provides information that will help the OIG make effective use of scarce training resources by using a common approach to identifying the training needs of the administrative support staff.
- Application of the guidelines becomes a basis for planning for and scheduling appropriate training at the appropriate time.
- It enables employees to plan and sequence appropriate career training and development.
- Using it will develop and strengthen employee professional qualifications and leadership abilities among the OIG support staff.

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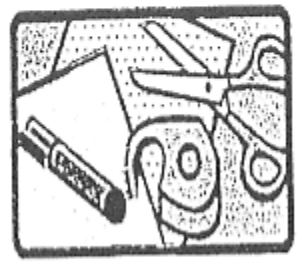
Administrative Support Training Matrix

Office Skills



- Basic Office Management
- Mail Practices
- Time and Attendance
- Files Improvement
- Travel Preparation
- Customer Service

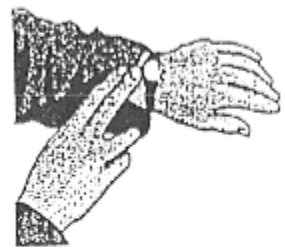
Computer Skills

- OIG PC Programs
- Computer Security Awareness
- Microsoft Word
- Microsoft Access
- Microsoft Excel
- Microsoft PowerPoint
- Email/Internet

Communication Skills

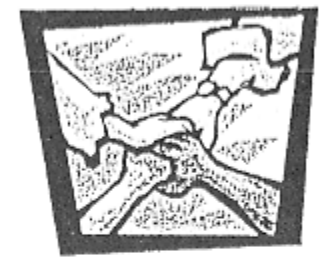
- Grammar
- Letter Writing for Secretaries
- Proofreading
- Listening
- Telephone Techniques
- Interpersonal Communication
- Professionalism
- Assertiveness
- How to Deal With Difficult People

Management Skills



- Management Skills for Secretaries
- Stress Management
- Time Management
- Prioritizing
- Project Management
- Secretarial Decision-Making
- Effective Delegation

Mission-Related Skills



- Investigating
- Auditing
- Teamwork
- Partnering With Your Supervisor

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PURPOSE

The HUD Office of the Inspector General (OIG) recognizes that a well-planned and implemented training program can enhance productive utilization of its staff resources in its administrative support programs. The qualifications, skills, career paths and other dimensions of these occupations often overlap. The purpose of the Administrative Support Training Matrix (ASTM) is to provide for the systematic, consistent, and efficient training and development of support employees. The matrix is designed to develop a cadre of support employees who contribute to the successful performance of the mission, strategies, and goals of the OIG. Attached to the matrix are three Appendices:

⇒ Appendix A – Training Sources
⇒ Appendix B – Training Log
⇒ Appendix C – Supervisor/Employee Talking Points

OBJECTIVES

Application of this matrix will:

- Provide employees and their supervisors with a single-source reference to assist in determining appropriate training;
- Prepare employees for full roles in the performance of their duties in the OIG;
- Assist supervisors in making effective use of scarce training resources by identifying the common training needs of the administrative support staff;
- Provide a basis for planning and scheduling appropriate training courses at the appropriate time;
- Enable employees to plan and sequence appropriate career training and development; and
- Develop and strengthen employee professional qualifications and leadership abilities.

The ASTM should be updated periodically to meet the following continuing and long-term objectives:

- To increase the number of employees who are qualified to fill the full performance level demands; and
- To revise, as necessary, information on critical training needs required and the availability and content of formal courses.

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Skill/Training Options

User Category: GS 4 through 8

- ◊ Investigative Assistant-Steno (Series 303)
- ◊ Investigative Assistant-Typing (Series 303)
- ◊ Office Automation Assistant (Series 326)
- ◊ Office Automation Clerk (Series 326)
- ◊ Program Assistant-Office Automation (Series 303)
- ◊ Records Management Assistant-Typing (Series 303)
- ◊ Secretary-Office Automation (Series 326)

This matrix does not link career levels or GS grade levels because they vary by location and position for a given occupation. Training needs may also vary based on the employee's background; that is, his or her prior experience, education, and training. The training levels designated below are important, however, as a means of assessing each employee's needs in conjunction with the Office of the Inspector General's organizational needs. The levels are:

⇒ *Entry Level*: Level at which a full range of formal and on-the-job training opportunities are required to learn the skills needed to perform the duties of the occupation

⇒ *Intermediate*: Advanced trainee level during which the required skills set is improved and refined through specialized formal training and on-the-job developmental opportunities.

⇒ *Full Performance*: Level at which the training and other developmental learning experiences include refresher training, training to maintain "state of the art" job skills, and to enhance job performance.

Competency Focus	Skill/Training	Level	Priority	Sources (See Appendix A)
Office Skills	Basic Office Management	Entry	R	USDA
	Mail Practices	Entry	R	HUD (Internal)
	Time and Attendance	Entry	R	USDA
	Files Improvement	Entry	R	USDA
	Travel Preparation	Intermediate	O	USDA
	Customer Service	Entry	R	USDA AMA

COMPETENCY FOCUS	SKILL/TRAINING	LEVEL	PRIORITY	SOURCES (See Appendix A)
Computer Skills	OIG PC Programs (FFS, ICMS etc.)	Entry	R	OIG HUD (Internal)
	Computer Security Awareness	Entry	R	OIG HUD (Internal)
	Microsoft Word (Basic)	Entry (Basic)	R	DynCorp USDA
	Microsoft Word (Advanced)	Full Performance	R	DynCorp USDA
	Microsoft Access (Basic)	Full Performance	O	DynCorp USDA
	Microsoft Excel (Basic)	Entry	R	DynCorp USDA
	Microsoft Excel (Advanced)	Full Performance	O	DynCorp USDA
	Microsoft PowerPoint (Basic)	Full Performance	O	DynCorp USDA
	Email/Internet (Basic)	Entry	R	DynCorp USDA
	Email/Internet (Advanced)	Full Performance	O	DynCorp USDA

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COMPETENCY FOCUS	SKILL/TRAINING	LEVEL	PRIORITY	SOURCES (See Appendix A)
Communication Skills	Grammar	Entry	R	USDA AMA
	Letter Writing for Secretaries	Full Performance	R	USDA AMA
	Proofreading	Entry	R	USDA FTC
	Listening	Entry	O	USDA AMA
	Telephone Techniques	Entry	R	USDA
	Interpersonal Communication	Intermediate	R	USDA AMA
	Professionalism	Full Performance	O	USDA AMA
	Assertiveness	Full Performance	O	USDA TM
	How To Deal With Difficult People	Full Performance	O	USDA TM

Competency Focus	Skill/Training	Level	Priority	Source (See Appendix A)
Management Skills	Management Skills for Secretaries	Entry	R	AMA
	Stress Management	Intermediate	O	USDA
	Time Management	Intermediate	O	USDA AMA
	Prioritizing	Intermediate	O	USDA AMA
	Problem Solving	Intermediate	O	USDA AMA
	Project Management for Secretaries	Full Performance	O	AMA
	Leadership Skills for Non-Supervisors	Full Performance	O	USDA
	Secretarial Decision-Making	Full Performance	R	USDA AMA
	Effective Delegation	Full Performance	O	USDA
Mission-Related Skills	Basic Investigating	Full Performance	R	OIG HUD (Internal)
	Basic Auditing	Full Performance	R	OIG HUD (Internal)
	Teamwork	Full Performance	O	TM
	Partnering With Your Supervisor	Full Performance	R	AMA TM

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APPENDIX A: TRAINING SOURCES

This list is intended to be a helpful tool for identifying appropriate training sources. It is not intended to be a comprehensive list of all sources available. Further, it should not be considered an endorsement of the sources listed in lieu of other training options that may be available in-house or in the local geographical area. The sources listed have multiple site locations throughout the United States. Refer to the web site or telephone number listed for locations near your regional location.

AMA
American Management Association International
1601 Broadway
New York, New York 10019-7420
1-800-714-6395
Email: cust_serv@amanet.org
Website: http://www.amanet.org

FTC
The Federal Training Center
5917 Kingsford Road, Suite 500
Springfield, Virginia 22152-1126
1-800-727-8622
703-913-5933 (Course Registration)
703-913-9823 (FAX)
Email: fedtrain@erols.com

USDA
National Capital Training Center
Graduate School, USDA
600 Maryland Avenue, SW
Room 280
Washington, DC 20024-2520
1-888-744-GRAD or
202-314-3400
202-479-6810 (FAX)
Email: nctc@grad.usda.gov
Website: http://grad.usda.gov

DynCorp
2000 Edmund Halley Drive
Reston, VA 20191
703-264-0330
Website: www.dyncorp.com

Preferred provider

TM
Transition Matters®
9155 Ft. Fisher Court
Burke, Virginia 22015
703-425-4259
703-978-1601 (FAX)
Email: trnsmatr@idsonline.com
Website: http://www.transitionmatters.com

Specializes in "bundling" several topics
Trains on site.

Seminar & Workshop Sources

Fred Pryor Seminars
P.O. Box 2951
Shawnee Mission, Kansas 66201
1-800-255-6139
913-722-8585 (FAX)

Padgett Thompson
Division of American Management Association International
P.O. Box 8297
Overland Park, Kansas 66208
1-800-255-4141 or
913-451-2900
1-800-914-8879 (FAX)
Email: cust_serv@amanet.org
Website: http://www.amanet.org

National Seminars Group
P.O. Box 419107
Kansas City, Missouri 64141-6107
1-800-258-7246 or
913-432-0824

Skill Path Seminars
1-800-873-7545
913-677-3200
Email: skillpath@mcimail.com

Appendix B: Training Log

The following "Training Log" is designed to augment the employee's Individual Development Plan (IDP). The Training Log may be used by the employee as a record for tracking completed and anticipated training, and as a tool to enhance communication between the employee and supervisor regarding skill development. We recommend that the employee and supervisor meet to discuss the value and appropriateness of the training in enhancing the employee's performance within 90-120 days following ***each*** training course completed by the employee. This discussion will also provide a forum for continuous feedback on employee performance throughout the year.

Competency Focus	Skill/Training	Course (s)	Dates of Accomplishment
Office Skills	Basic Office Management		
	Mail Practices		
	Time and Attendance		
	Files Improvement		
	Travel Preparation		
	Customer Service		

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COMPETENCY FOCUS	SKILL/TRAINING	COURSE (S)	DATES OF ACCOMPLISHMENT
Computer Skills	OIG PC Programs		
	Computer Security Awareness		
	Microsoft Word (Basic and Advanced)		
	Microsoft Excel (Basic and Advanced)		
	Microsoft Powerpoint (Basic)		
	Microsoft Access (Basic)		
	Email/Internet (Basic and Advanced)		

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Competency Focus	Skill/Training	Course(s)	Dates of Accomplishment
Communication Skills	Grammar		
	Letter Writing for Secretaries		
	Proofreading		
	Listening		
	Telephone Techniques		
	Interpersonal Communication		
	Professionalism		
	Assertiveness		
	How To Deal With Difficult People		

COMPETENCY FOCUS	SKILL/TRAINING	COURSE (S)	DATES OF ACCOMPLISHMENT
Management Skills	Management Skills for Secretaries		
	Stress Management		
	Time Management		
	Prioritizing		
	Problem Solving		
	Project Management for Secretaries		
	Leadership Skills for Non-Supervisors		
	Secretarial Decision-Making		
	Effective Delegation		

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Competency Focus	Skill/Training	Course (s)	Dates of Accomplishment
Mission-Related Skills	Special Agent Familiarization Basic Auditing Teamwork Partnering With Your Supervisor		

To record training accomplishments not identified in the above listing:

Competency Focus	Skill/Training	Additional Course (s)	Dates of Accomplishment

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Appendix C: Supervisor/Employee Talking Points

This guide will help employees and supervisors establish reasonable goals, assess individual strengths and chart how employees can best contribute and grow at their agency.

Use the following list of guidelines when conducting a career development discussion session:

Do	Don't
• Have privacy • Establish a comfortable setting • Consider one problem at a time • Have both employee and supervisor suggest solutions • Know what you want to accomplish • Use tact and diplomacy • Be prepared • Keep discussion confidential • Show interest • Recognize positive points • Listen first • Be clear and concise • Be sincere and fair	• Engage in personal monologues • Get hung up on personalities • Introduce irrelevant material • Lose self-control • Be coerced • Make excuses • Be domineering • Make promises you can't keep • Delay or postpone follow up discussions • Be judgmental • Be defensive • Dwell on negatives • Let discussions escalate into shouting matches (Agree to reschedule discussion)

What the supervisor and the employee should both be prepared to discuss:

⇒ The employee's employment history;
⇒ The employee's formal and continuing education background;
⇒ The employee's record of performance with the organization;
⇒ Available avenues for promotions and/or different types of work within the agency (career ladders, bridge positions, etc.); and,
⇒ The organization's policies on training, both on-the-job and off-the-job.

The first discussion session should cover:

⇒ How does the employee like his/her present job?
⇒ What are the employee's career plans for the next year; next three years; next five years?
⇒ What is the employee's understanding of what is necessary to carry out his/her career plans?
⇒ How aware is the employee of the organization's training programs and career ladders?
⇒ How aware is the employee of training opportunities in the community and through outside sources?
⇒ How much of his/her own time and effort is the employee willing to devote to qualifications improvement?
⇒ How do the employee's personal career goals fit with the organization's needs and goals?

Desired goals of employee/supervisor discussions:

⇒ The employee should talk about where he/she is now and where he/she would like to be at specified intervals in the future.
⇒ The supervisor should be able to suggest lines of work the employee may not have considered.
⇒ Both should identify a target position or positions for the employee, including the qualification requirements for the target positions identified.
⇒ Discuss ways the employee may attain the necessary qualifications.
⇒ Work out a step-by-step training plan geared specifically to the target position(s). Include a timetable.
⇒ Establish dates for periodic follow-up discussion sessions.
⇒ Provide sufficient information to use in preparing a useful and worthwhile Individual Development Plan (IDP) for the employee.

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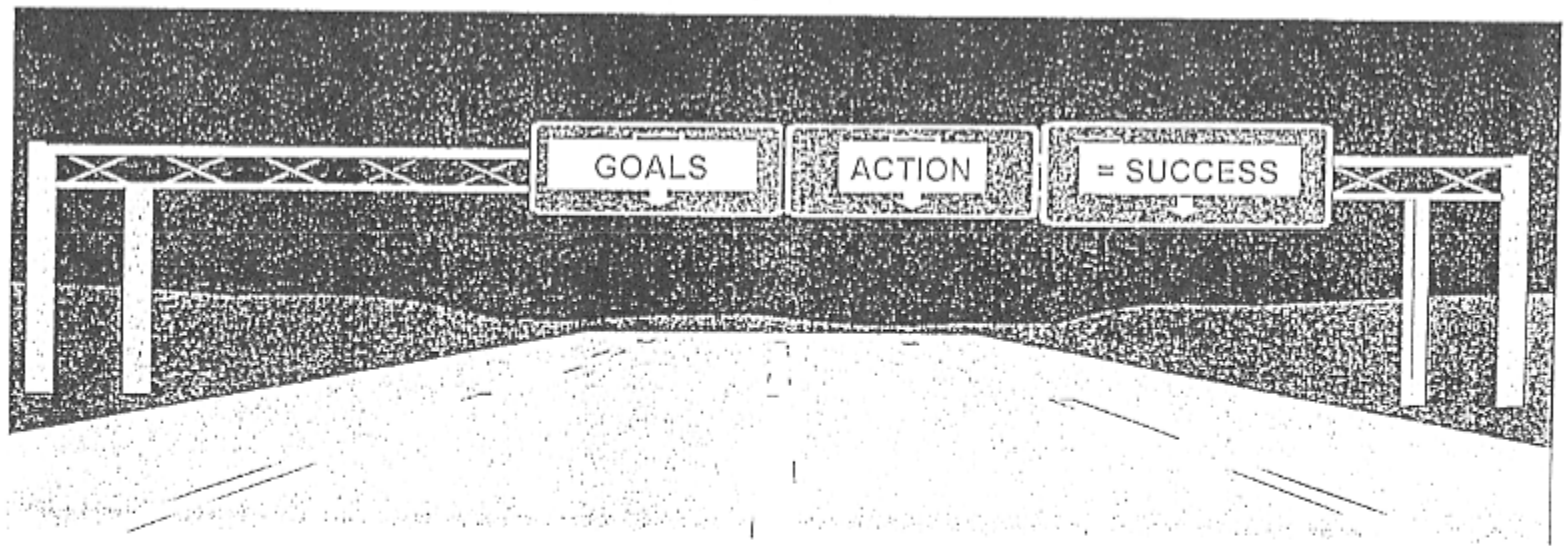
Areas to take into consideration when setting goals

- *Other Commitments:* Family; current work schedules, hobbies, community obligations, etc. Don't outline a program with lots of self-study and formal courses if a very heavy work schedule is anticipated.

- *Previous Training Experiences:* It is easier to start an ambitious college study program if the employee has taken college courses in the past. If not, it might be better to try just one course, or a short course or seminar, before getting involved in a whole curriculum.

- *Desire to Achieve Goal:* Employees don't need lofty goals. Most of us are generally satisfied with our level of success. We should, however, always strive to improve our performance by adding and enhancing our skills.

- *Knowledge of the Organization:* Employees should find out as much as possible about career ladders, forecasted staffing needs, expected vacancies, reorganizations, and what competencies are needed by the organization. ***This is very important.*** The great value of the IDP is that employees have a chance to find out the organization's perspective about its needs. By doing this employees can keep open as many options as possible, thereby making themselves valuable to the organization by developing competencies that are in demand.



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