Needs Assessment User Guide
Foreword

ADVISOR Enterprise is a Training Management System that drives training efficiency by (a) aligning current and future training activities to operational requirements to identify gaps, duplications and training with minimal value; (b) forecasting and comparing the costs of viable delivery options; (c) uncovering cost drivers; and (d) improving resource allocation. ADVISOR is built around the ADDIE model with the added flexibility of starting the analysis at any level. ADVISOR is made up of the following modules that can be used separately or in any combination.

| Needs Assessment | Assess: To find out “the cause of the problem and potential solutions”. Provides a step by step approach for understanding a problem before selecting the solution – in other words, before assuming that training is needed. Needs Assessment provides an audit trail and serves as the foundation for decisions by zeroing in on the source of the problem, identifying solutions that can produce the desired level of productivity, and highlighting actions that will generate the greatest impact. [Scope and Needs Assessment]. |
| Training Analysis | Analysis: To find out “who needs to be trained, on what and why”. Provides a step by step approach for conducting Training Needs Analysis (TNA) or Training Systems Requirements Analysis (TSRA) to identify training needed by each job, position and employee to perform duties to the desired standard under the prescribed conditions. Four approaches may be used to conduct training analysis, namely Mission, System, Competency or Job. [Mission Analysis, Competency Analysis, System Analysis, Job Task Analysis, Knowledge/Skill Gap Analysis and Training Requirements Analysis]. |
| Training Design | Design: To find out “what is the most effective and economical way to deliver training”. Provides a step by step approach for conducting Training Media Analysis (TMA) or Option Analysis to identify the most cost effective strategy for the delivery of training and generates Training Plans. The analysis takes into account limitations, instructional design requirements, upfront and recurring costs over training program life as well as risks associated with the introduction of new technology. [Media Analysis, Cost Analysis and Training Plans]. |
| Fidelity Analysis | Develop: To find out the “fidelity requirements of training devices”. Provides a step by step approach for assessing the functional requirements of trainers and simulators based on training needs and performance objectives. It identifies visual, tactile, olfactory, affective and auditory sensory cues needed to practice tasks, within realistic environments, under preset conditions to attain the desired level of competency. In addition, ADVISOR takes into account elements within the virtual world and how users interact with each. |
| Resource Management | Implementation: To find out “how much money and resources are needed”. Compiles and analyzes missions/goals, competencies, systems, jobs, tasks, training requirements, courses, activities, costs, personnel and resources to generate concise, up to date and actionable reports. The reports provide insight on planned training activities for any time period; training requirements for each job/employee; budget, personnel and resource requirements, training impact as well as how to drive training effectiveness and efficiency by leveraging technology, improving resource allocation and identifying gaps, duplications and unwarranted training. [Forecast and Optimize Training Budgets, Personnel and Resources]. |
| Project Management | Implementation: To find out “how training should be implemented”. Provides a step by step approach for planning a project and tracking progress in real time. This includes the setup of phases and tasks, dependencies and constraints, timelines as well as the assignment of personnel and resources needed to complete. Moreover, ADVISOR tracks progress by comparing hours worked and money spent on each task to project plan, to anticipate delays, facilitate the implementation of corrective measures, and keep projects on-time and within budget. [Develop Project Plans and Track Progress]. |
**Performance Analysis**

Evaluation: To find out “how training impacts performance and organizational goals”. Provides a step by step approach for improving performance by zeroing in on the source of the problem and identifying solutions that can produce the desired level of productivity. Moreover, ADVISOR highlights actions that will generate the greatest impact by assessing the feasibility of implementing plausible solutions as well as forecasting the costs, benefits and Return on Investment (ROI) of each intervention. [Performance Gap Analysis, Root Cause Analysis and Cost Benefit Analysis].

**Training Life Cycle Management**

Manage: To “continually uncover venues to drive training effectiveness & efficiency”. Maintains training effectiveness and efficiency over time by continually assessing the impact of changes to missions, jobs, tasks, systems, policies, technologies, throughput, and so forth on training content and activities; as well as budget, personnel and resource requirements. This is attained through a digital-twin model that continually aligns training activities to operational requirements to identify gaps, duplications and training with minimal value. Results (personnel/resource requirements for any time period; cost drivers; bottlenecks and deficiencies) are quickly and concisely communicated through dashboards. Actions that drive training effectiveness and efficiency are also highlighted.
Approach

Why is ADVISOR Enterprise so effective? Because it focuses on operational requirements – i.e., identifies the knowledge, skills and competencies needed by each job, position and employee to attain organizational missions/goals, as well as the most efficient way to achieve. In addition, facts support the decision making process, helping you create consensus to stay the course.

Using our proprietary methodology, your efforts unfold in four phases, as follows:

**Discover**
- Define Missions/Goals.
- Identify Tasks needed by each Job/Position/Employee to attain missions/goals.
- Identify Training requirements.
- Outline current Training Courses/Activities.
- Find out where money and resources are allocated.

**Strategize**
- Map Training Courses/Activities to Operational Requirements to identify gaps, duplications and unwarranted training.
- Assess alternate venues for the delivery of training.
- Uncover resource allocation.
- Uncover cost drivers.

**Prioritize**
- Prioritize Training Courses/Activities - from highest to lowest impact on missions/goals.
- Prioritize recommended changes to current delivery options.
- Identify personnel/resources excess capabilities and bottlenecks.
- Identify strategies for mitigating high cost items.

**Optimize**
- Develop an implementation strategy starting with low risk, low cost, high impact options.
- Align personnel/resources with new strategy.
- Develop project plans and monitor progress.
- Assess and validate results.
**Needs Assessment Module**

ADVISOR Needs Assessment module provides a step by step approach for understanding a problem before selecting the solution – in other words, before assuming that training is needed. Needs Assessment provides an audit trail and serves as the foundation for decisions by zeroing in on the source of the problem and identifying solutions that can produce the desired level of productivity. Moreover, ADVISOR highlights actions that will generate the greatest impact.

**ADVISOR is a very powerful, useful tool for making decisions about which medium is right for your organization. A significant contribution to the training industry.**

Brandon Hall
Editor, Multimedia and Internet Training
ADVISOR Features

**Performance Gap Analysis:** Assess and validate actual missions/goals performance and compare to desired performance to identify performance gaps.

**Performance Measures Analysis:** Assess the impact of performance gaps.

**Job and Performance Analysis:** Identify Jobs and Tasks that contribute to performance gaps. Assess ability to perform Tasks to the desired standard.

**Data Required:** Highlight data needed to assess the cause of the problem. Provide questionnaires for collecting data from employees, supervisors, subject matter experts, and so forth.

**Root Cause Analysis:** Quickly zero in on the root cause of a performance deficiency by considering crew and supervisors’ feedback, tools, policies and work environment to identify viable solutions.

**Solution Effectiveness Analysis:** Assess and rate the impact of plausible solutions.

**Solution Analysis:** Assess the impact of each intervention and prioritize recommendations.

ADVISOR Benefits

**Speed Data Collection:** Collect data from employees, supervisors, subject matter experts, etc., offline through custom-built questionnaires. Exchange data with other systems through xml.

**Facilitate Collaboration:** Store all data in a centralized database – accessible anytime and from anywhere by team members with only a Browser. Track changes made by each individual.

**Facilitate Reusability:** Search, locate and copy relevant missions/goals, jobs and Tasks among projects with ease.

**Speed Analysis:** Quickly Identify Jobs and Tasks that may contribute to a performance gap; as well as plausible solutions to address performance gaps.

**Minimize Waste:** Avoid solutions with minimal impact on performance deficiency, solutions that do not meet organizational need or contribute to bottom line – i.e., costly decisions based on faulty assumptions.

**Maximize Impact:** Prioritize solutions based on impact – i.e., where budget and resources should be allocated.

**Speed Report Generation:** Produce Root Cause Analysis and Needs Assessment reports in a single click.

BNH delivered as promised.
Col. Eric MacArthur
Canadian Forces College

Very user friendly. Covers all aspects you should consider when making a decision.
Joyce Miligan
Training Manager, New Brunswick Tel
Acknowledgement

ADVISOR Enterprise is the result of over twenty years of research and development. Dozens of organizations and hundreds of individuals have contributed to the development and evolution of ADVISOR and for this we are very appreciative. Our primary objective is to develop a practical, reliable and robust tool that simplifies and speeds training analysis, forecasts and optimizes training resources, improves resource allocation, generates audit trail to support recommendations, facilitates collaboration and sharing of data among team members, minimizes duplication as well as facilitates the upkeep of analysis over time to keep training programs effective, efficient and relevant. We believe that with the assistance and contribution of the following organizations and individuals, we have been able to accomplish this goal.

- CAE
- Canadian National Defence
- Federal Deposit Insurance Agency
- Lockheed Martin
- National Security Agency
- Merck Company
- Nortel Networks
- Pearson TQ
- Raytheon Systems Company
- Southern Steel Company
- UK Ministry of Defence
- United States Air Force
- United States Army
- United States Coast Guard
- United States Marine Corps
- United States Navy

- Lisa Abramson – Merck & Company
- Larry Alberter – National Security Agency
- Cathi Billings – Sheppard AFB
- Ferrell Briggs – Naval Aviation Maintenance Training Group
- Tim Bothell – Franklin Covey Company
- Greg Campbell – Canadian National Defence
- Bruce Castle – Lockheed Martin
- Bryan Chapman – Brandon-Hall.com
- Rick Cheek – Keesler AFB
- Dr. Ed Chenette – Chief of Naval Education and Training
- Dr. Adelaide Cherry – Maxwell AFB
- Alex Cohoon – US Navy, Virginia Beach FCTCLANT
- Beverly Condon – Goodfellow AFB
- Dr. Dennis Duke – US Navy Naval Air Systems Command
- Dr. Bruce Eddy – Lockheed Martin
- Russell Edmonds – UK MoD, Training and Simulation Systems Programme (TSSP)
- Frederick Glover – Naval Aviation Maintenance Training Group
- Dr. Robert Guptill – Dynamic Research Corporation
- Richard Grahlman – Naval Postgraduate School
- Dr. Jo Ann Graves – Expeditionary Warfare Training Group, Pacific
- Dr. Anthony Head – UK MoD, HQ Land Forces
- Janet Heins – Merck & Company
- Peter Hope – Canadian National Defence
- Betty Sue Jones – Maxwell AFB
- James Kalivoda – Naval Education and Training Professional
- David M Lorage – US Coast Guard
- Dr. Fred Madsen – Lockheed Martin
- Dr. Tim McLaughlin – Raytheon Professional Services
- Dr. Bill Melton, US Army – TRADOC
- Jesse Martinez – US Marine Corps
- Dr. Arlen Michaels – Nortel Networks
- Hector Moya – Goodfellow AFB
- Vangie Nix – Maxwell AFB
- Stephane Ouellet - CAE
- Arlene Parker – Keesler AFB
- Dr. Albert Pruett – Naval Aviation Maintenance Training Group
- Peter Sabiston – Canadian National Defence
- Mike Sazma – Great Lakes Naval Training Center
- Fred Roberts – Federal Deposit Insurance Corporation
- Roger St. Pierre – Canadian National Defence
- William Schafer – Trident Training Facility Bangor
- Dr. Bill Shook – Boeing Company
- Robert Simmon – Naval Technical Training Center
- John Stacy – Kraft Foods
- Karl Stradley – Raytheon Professional Services
- Gary Troy – Goodfellow AFB
- Dr. Steve Ulosevich – Southern Steel Company
- Chris Winters – Raytheon Systems Company
- Pete Willey – Pearson TQ
- Dr. Kenneth Woolman – Lockheed Martin

Thank you.

J. Bahlis, Ph.D., P.Eng.
President
BNH Expert Software Inc.
# Table of Contents

1. **Getting Started** ................................................................. 1
   1.1 Introduction ........................................................................ 1
   1.2 How can ADVISOR Help You? ........................................... 2
   1.3 System Requirements .................................................... 3
   1.4 Background Theory ........................................................... 4
   1.5 Getting Started ............................................................... 6
   1.6 How is ADVISOR Organized? .......................................... 7
   1.7 Basic ADVISOR Functions .............................................. 8
       Add ............................................................................. 8
       Edit ........................................................................... 8
       Delete ........................................................................... 9
       Track Changes ............................................................. 9
       Edit Multiple Records ................................................ 10
       Modify Hierarchy .......................................................... 11
       Search and Copy .......................................................... 12
       Import Data ................................................................. 13
       Setup and Assign Meta Tags ......................................... 14
       Specify Items per Page ............................................... 15
       Limit Access to Data/Analysis ....................................... 16
       Collaborate with Team ................................................ 16
       Add Notes ..................................................................... 17
   1.8 Learning ADVISOR .......................................................... 17
   1.9 References .................................................................... 18

2. **Define Problem** ................................................................. 19
   2.1 Introduction ...................................................................... 19
   2.2 Setup New Projects ....................................................... 21

3. **Mission/Goal Analysis** ................................................... 23
   3.1 Introduction ..................................................................... 23
   3.2 Add Missions/Goals ...................................................... 24
   3.3 Search/Copy Missions/Goals ........................................ 27

4. **Job Analysis** ..................................................................... 29
   4.1 Introduction ..................................................................... 29
   4.2 Add Jobs/Roles ............................................................. 30
   4.3 Search/Copy Jobs/Roles ................................................. 30

5. **Task Analysis** ................................................................. 33
   5.1 Introduction ..................................................................... 33
   5.2 Add Tasks ..................................................................... 34
   5.3 Conduct Root Cause Analysis .................................... 35
   5.4 Data Collection Methods ............................................ 36
   5.5 Data Collection Questionnaires .................................... 36
   5.6 Uncover Plausible Solutions ........................................ 37
   5.7 Generate Root Cause Analysis Report ......................... 39
6. Prioritize Solutions .................................................................................................................. 41
   6.1 Rate Plausible Solutions ....................................................................................................... 41

7. Generate Reports ...................................................................................................................... 43
   7.1 Needs Assessment Report .................................................................................................... 43

8. Annex A: Data Collection Forms ............................................................................................ 45
   Employees Questionnaire ......................................................................................................... 45
   Employees Questionnaire Summary ......................................................................................... 47
   Human Resources Questionnaire ............................................................................................... 49
   Human Resources Questionnaire Summary ............................................................................... 50
   Subject Matter Expert Questionnaire ....................................................................................... 51
   Subject Matter Expert Questionnaire Summary ......................................................................... 52
   Supervisor Questionnaire ........................................................................................................ 53
   Supervisor Questionnaire Summary ........................................................................................ 55
   Instructor Questionnaire ........................................................................................................ 57
   Instructor Questionnaire Summary ........................................................................................... 58
   Senior Executive Questionnaire ............................................................................................... 59
   Senior Executive Questionnaire Summary ............................................................................... 60
Chapter 1: Getting Started

1.1 Introduction

When faced with a performance deficiency, all too often the focus gravitates towards training as the solution. In most cases, however, performance gaps are caused by multiple factors including vague expectations, insufficient and untimely feedback, limited access to required information, inadequate tools, resources and procedures, inappropriate and counterproductive incentives, and so on. Moreover, it is much easier to fix the environment than people. To put it in simple terms – if the gap is not due to a lack of knowledge and skills, don't train!

Whenever you are investigating a performance deficiency, the reasons behind the performance gap as well as the costs and benefits of plausible solutions should be clearly articulated. With accurate, factual data in hand, solutions can be identified; costs and benefits quantified; interventions prioritized and action plans formalized to close any gaps while continually improving performance.
1.2 How Can ADVISOR Help You?

In addition to simplifying and speeding Training Needs Analysis (TNA) and Training Systems Requirements Analysis (TSRA), ADVISOR Enterprise drives training efficiency by aligning current and future training activities to operational requirements to identify gaps, duplications and training with minimal value; uncovering cost drivers; forecasting and comparing the costs of viable delivery options; improving resource allocation; identifying/mitigating bottlenecks; producing training plans that leverage existing training programs/resources and generating audit trail to support recommendations.

Moreover, ADVISOR preserves training integrity, effectiveness, efficiency and relevance by quickly identifying training activities that could be impacted by a change to a mission, system, job, policy or publication; facilitates reusability and collaboration by storing all data in a centralized database that can be accessed anytime and from anywhere by all team members with only a browser; simplifies data collection from Subject Matter Experts through custom built Excel spreadsheets; speeds data analysis; simplifies data manipulation; tracks changes made by each team member; and generates dozens of reports in a single click. ADVISOR is also web based, can be installed on a local Server or used off BNH Server (cloud option), consists of 8 modules that can be used separately or in combination to meet various needs, and can be customized in line with requirements.

More specifically, follows are ADVISOR “Needs Assessment” module features and benefits.

**ADVISOR Features**

**Performance Gap Analysis:** Assess and validate actual missions/goals performance and compare to desired performance to identify performance gaps.

**Performance Measures Analysis:** Assess the impact of performance gaps.

**Job and Performance Analysis:** Identify Jobs and Tasks that contribute to performance gaps. Assess ability to perform Tasks to the desired standard.

**Data Required:** Highlight data needed to assess the cause of the problem. Provide questionnaires for collecting data from employees, supervisors, subject matter experts, and so forth.

**Root Cause Analysis:** Quickly zero in on the root cause of a performance deficiency by considering crew and supervisors’ feedback, tools, policies and work environment to identify viable solutions.

**ADVISOR Benefits**

**Speed Data Collection:** Collect data from employees, supervisors, subject matter experts, etc., offline through custom-built questionnaires. Exchange data with other systems through xml.

**Facilitate Collaboration:** Store all data in a centralized database – accessible anytime and from anywhere by team members with only a Browser. Track changes made by each individual.

**Facilitate Reusability:** Search, locate and copy relevant Missions/Goals, Jobs and Tasks among projects with ease.

**Speed Analysis:** Quickly Identify Jobs and Tasks that may contribute to a performance gap; as well as plausible solutions to address performance gaps.

**Minimize Waste:** Avoid solutions with minimal impact on performance deficiency, solutions that do not meet organizational need or contribute to bottom line – i.e., costly decisions based on faulty assumptions.
**Solution Effectiveness Analysis:** Assess and rate the impact of plausible solutions.

**Maximize Impact:** Prioritize solutions based on impact – i.e., where budget and resources should be allocated.

**Solution Analysis:** Assess the impact of each intervention and prioritize recommendations.

**Speed Report Generation:** Produce Root Cause Analysis and Needs Assessment reports in a single click.

---

BNH delivered as promised.

Col. Eric MacArthur
Canadian Forces College

Very user friendly. Covers all aspects you should consider when making a decision.

Joyce Miligan
Training Manager, New Brunswick Tel

---

### 1.3 System Requirements

**Database/Server Minimum Requirements**

- 2 CPU Processor with 4GB of RAM
- 5 GB of free Hard Disk Space
- Windows 2000, 2003, 2008, 2012 R2, 2016, 2019, 7, 8, 8.1, 10, NT, or Sun Solaris 9.0 or higher, or Linux Red Hat 6.0 or higher
- Web Server that supports Java Virtual Machine and can run Java Servlet. Supported products include: Tomcat 4.0 or higher, IBM WebSphere 4.0 or higher, Resin, Oracle Application Server, Jserv and others...
- Oracle version 9i, 10g, 11g, 12c, 18c or 19c

**Workstation/Desktop Minimum Requirements**

- Pentium IV with 512 MB RAM
- 200 MB of free Hard Disk Space
- Windows 98, ME, XP, VISTA, 7, 8, 10, NT, 2000, 2003, 2008, 2012 R2, 2016, 2019 or Oracle Solaris 9.0 or higher or Linux Red Hat 6.0 or higher
- Internet Explorer 6.0 or higher, Microsoft Edge, Mozilla Firefox 3.0 or higher, Google Chrome, or Safari
1.4 Background Theory: HPI Process

Step 1. Problem Definition

Define the problem and validate assumptions. In other words, who initiated the request for analysis or training, and for what reason? Based on circumstantial evidence and constraints, the validity of the request can be evaluated, the cost of problem estimated and need for further analysis confirmed.

Step 2a. Mission/Goal Analysis

The impact of the problem or opportunity on performance can be estimated. The mission/goal analysis can take into account the impact on productivity, costs, time and quality.

Step 2b. Job Analysis

Identify potential sources of the problem. Sources may reside to a varying degree within multiple jobs in various units/divisions. For example, “the unexpected drop in market share” may have originated from sales, marketing, customer service and support staff”.

For Each Mission or Job

Step 3. Task Analysis

Evaluate the adequacy of performing Tasks to the desired standard. Should the evaluation reveal a performance deficiency (i.e., a gap between desired and actual Task performance), a root cause analysis may be performed to determine the source of the problem as well as plausible solutions.

For Each Task

Step 4. Root Cause Analysis

Collected data is analyzed to uncover factors that impact the performance of each Task. These may include employees’ lack of knowledge and skills, misunderstanding of job functions, misinterpretation of rules/regulations, access to tools, conflict with colleagues, and so on.

Step 5. Plausible Solutions

Once the cause of the problem has been uncovered, interventions for each Task are identified and rated in terms of their potential to bridge the performance gap. In addition to training and job aids, plausible solutions may include task, job and/or organizational redesign, new/improved tools, policies/procedures, incentive system and hiring practices.

Step 6. Prioritize Actions

Prioritize the recommendations and prepare a plan of action. The costs and benefits of plausible solutions for all missions or jobs are compiled and compared to provide a clear picture of which interventions will generate the greatest impact and why.
1.5 Getting Started

To log on to ADVISOR Enterprise, go to http://www.bnhexpertsoft.com, click on “Log in”, input your Username and Password, and click [Login]. A Popup Window with step by step instructions is presented to familiarize you with ADVISOR. You may change your username, password and preferences by clicking on the Preferences node under the Personalize tab, editing the required items and clicking [Save]. For example, you may hide or display the Popup Window under the Options tab under the Preferences node by placing or removing the checkmark next to the ADVISOR Tour field and clicking [Save]. Context sensitive online help is also available for each field by clicking on [Help].

To make the most out of ADVISOR Enterprise, Chapters 2 through 6 should be thoroughly reviewed to gain clear understanding of the system’s capabilities and how to configure ADVISOR to best meet your needs. For example:

- How to setup/configure Clients in line with project needs; i.e., data to be collected, analysis to be conducted and delivery options to be considered?
- How to setup User Accounts and assign privileges?
- How quality and consistency should be controlled?
1.6 How is ADVISOR Organized?

ADVISOR has five main components organized within 3 windows (top, left and right – the sizes of the windows can be adjusted by dragging the border). Once you become familiar with these components, the system operation and navigation will become fairly simple.

a) Basic Functions (top window) – Actions available to user are presented at the top of the screen. You can Add, Save, Copy, Delete, Merge, Diverge, add comments/assumptions to a screen (Notes), Print a screen, Return to previous level (Up), Restore previous values, display context sensitive Help or Logout. Information is only saved when you click [Save].

b) Path (top window) – Tracks your progress as you navigate through ADVISOR.

c) Tree (left window) – Lists options (nodes) available to user. To expand an option (node), click on the [▼] icon. To view the contents of an option (node), click on corresponding node.

d) Tabs (top of right window) – Data for some nodes are divided into several tabs. Click on tab to view its contents.

e) Main Window (right window) – Content of each screen is presented in this window.

---

www.bnhexpertsoft.com
Copyright © BNH Expert Software Inc.
1.7 Basic ADVISOR Functions

**Add:** To add a Project, Mission, Job, Task, or any other element:

**Step 1:** Click on corresponding folder (Projects, for example).

**Step 2:** Click [Add].

**Step 3:** Input the desired info.

**Step 4:** Click [Save].

**Edit:** To edit a Project, Mission, Job, Task, or any other element:

**Step 1:** Click on corresponding element (Project A, for example).

**Step 2:** Modify the desired info.

**Step 3:** Click [Save].
Delete: To delete a Project, Mission, Job, Task, or any other element:
Step 1: Place checkmarks next to the desired records (Project Management Office, for example).
Step 2: Click [Delete].

Track Changes: To find out when an element was created, modified or deleted and by whom, click on the View History icon to display relevant data.
Edit Multiple Records: To edit multiple Projects, Missions, Jobs, Tasks, or any other elements:

**Step 1:** Click on the corresponding folder.

**Step 2:** Click on the Edit All icon.

The Projects, Missions, Jobs, Tasks, Objectives, Courses, and so forth are presented in an Excel like tabular format. You may sort the data on any column (Title, for example), or lock (prevent the column from scrolling), by clicking on the arrow to the right of the column title, and selecting desired option. To edit a field, click on the field, input or select option. Once the desired fields/records are edited, click on [Save] to save all changes.
Modify Hierarchy: To change the hierarchy or the order of Tasks:

Step 1: Click on the corresponding folder.
Step 2: Click on the Edit Tree icon.

Tasks or Objectives are presented in a tree-like structure. To change the hierarchy or order, simply drag and drop the tasks or objectives to the desired locations. All links to Missions, Jobs, Objectives, Courses, etc.; as well as attributes including Knowledge, Skills, Attitudes, References and so forth are preserved. For example, “Perform risk analysis” sub-task may be dragged under the Tasks folder to become a Task. Moreover, all its links and attributes will remain intact. You may also view and edit the attributes of any Task or Objective by right clicking on the Task and selecting the Edit option. Once record is edited, click on [Save] button above the record to save; and the [Save Tasks] button to save hierarchy changes.
Search and Copy: You can search and copy Missions, Jobs and Tasks as follows:

**Step 1:** Click on the desired folder – Mission Analysis, Job Analysis or Tasks Analysis.

**Step 2:** Click on the [Search] tab.

**Step 3:** Select the desired search criterion and click [Save] – more options may be provided – to display available elements.

**Step 4:** Select the desired item to copy data from and click [Save].

**Step 5:** Place checkmarks next to the desired elements (Tasks, for example) and click [Save] to copy the elements (Tasks) including attributes and sub elements (Sub Tasks).
Import Data: Dozens of Excel Spreadsheets are provided (http://www.bnhexpertsoft.com/data-collection-forms-scope-version-12/) to simplify and speed offline data collection from Subject Matter Experts (SMEs). The attributes and options within each form (Job Tasks, for example) are identical to the corresponding (Job Tasks) fields within ADVISOR. Once completed, the data can be uploaded to ADVISOR Enterprise with a few mouse clicks, as follows:

Step 1: Click on the folder where data should be imported. Please note that each spreadsheet is designed to import data under a specific folder within ADVISOR Enterprise. For example, the Mission Tasks spreadsheet is designed to import Tasks under Missions, while the Job Tasks spreadsheet is designed to import Tasks under Jobs.

Step 2: Click on the [Import] tab.

Step 3: Click [Choose File] and select the desired spreadsheet.

Step 4: Indicate which row to start importing data from, in the Start From Row field. The top 4 rows in ADVISOR Excel spreadsheets are reserved for headings and instructions. Collected data typically starts on the 5th row.

Step 5: Indicate where the data for each field resides within the Excel spreadsheet. For example, if Task Title is stored in column 1, then input 1; and so forth. Data in Excel spreadsheets is sequentially mapped to corresponding fields in ADVISOR. You are not required to import all attributes. For example, if the Status and Task Classification attributes are not required, do not input column numbers for these fields. ADVISOR will not import data for attributes that have not been assigned a column number.

Step 6: Click [Save] to import.

Note: Reference Code is also used for detecting duplicate records. For example, if Job Task is imported, ADVISOR will 1st verify whether the Job already has a Task with the same Reference Code. If it does, the following message will appear “Duplicate Records already exist. Overwrite attributes?” If Ok is selected, the attributes of the Job Task in ADVISOR will be updated. If Cancel is selected, the import will be aborted.
Setup and Assign Meta Tags: To minimize duplication each time a Mission, System or Project Task is added, it is stored in a centralized repository. The Tasks can, in-turn, be assigned to any Mission or System by clicking on the [Select] tab, placing checkmarks next to desired Tasks and clicking [Save].

Similarly, Knowledge, Skills and Attitudes (KSAs) are stored in a centralized repository and can be assigned to any Task or Objective.

To quickly zero in on desired Tasks or KSAs within a repository, Meta Tags can be created under the Project Knowledge/Skill Attributes folder and assigned to any Task or KSA by clicking on [Meta Tags] tab, selecting the desired Meta Tags and clicking [Save].
Specify Items per Page: By default, 10 items (such as Projects, Tasks, Objectives, Knowledge/Skills, and so forth) are displayed on each page. Once the number of items exceeds 10, the remaining items are displayed on subsequent pages. The number of pages available for each item is indicated on the top right as shown below. To display the items within each page, click on the corresponding page number.

You can modify the number of items to be displayed on each page under [Options] tab for the Preferences node under the Personalize tab by specifying the number of items to be displayed on each page and clicking [Save].
Limit Access to Data/Analysis: By default, when a new Project, Job, Task, and so forth is created, its **Status** is set to **Public** to permit other Users to find, copy and reuse the Project, Job or Task using the Search function and in-turn minimize the effort needed to conduct the analysis. This does not imply that other Users can review and edit your Project, Job or Task. It simply implies that they can reuse. To maintain anonymity, you can set the Project, Job or Task Status to **Private**, and in-turn exclude them from the Search function.

Collaborate with Team: Each analysis including Project, Course and so forth is assigned to a specific User (Manager) – typically the individual that created the Project or Course. By default, only the Manager can view the Project or Course and make changes. To allow other Users to review and make changes, the Project or Course can be shared with them by clicking on the [Sharing] tab, placing checkmarks next their name and clicking [Save]. If the Project or Course Manager reports to another User, the Project or Course will be automatically shared with them. In this case, the checkmark next to the Supervisor name is presented in read only mode.
Add Notes: Users may add a Note to any screen by clicking on [Notes], typing the note in the new window and clicking [Save]. Notes from other Users are presented in read only mode in the bottom of the window. Users can only edit or delete their own Notes.

1.8 Learning ADVISOR

To use ADVISOR, you should know how to perform basic computer, Windows and Browser operations. For example, how to start and quit applications, selecting commands and dialog box options. To facilitate the learning process, ADVISOR comes with its own set of online tools. These include:

- **Online Tour:** a slide show that highlights ADVISOR’s main features. It is presented after User logs on ADVISOR. You can hide and redisplay by unchecking or rechecking the ADVISOR Tour field under the [Options] tab, under the Preferences node under the Personalize tab and clicking [Save].

- **Video Clips** to gain a better understanding of ADVISOR’s main functions and features. To view, please visit the following: [http://www.bnhexpertsoft.com/how-to-video-overview/](http://www.bnhexpertsoft.com/how-to-video-overview/).

- **Step-by-Step Guides** for configuring ADVISOR, as well as conducting mission analysis, system analysis, competency analysis, job task analysis, media analysis, cost analysis, fidelity analysis, performance analysis, etc. To view and download, please visit the following: [http://www.bnhexpertsoft.com/user-guides-version-12/](http://www.bnhexpertsoft.com/user-guides-version-12/).

- **Answers to Frequently Asked Questions** are available online at: [http://www.bnhexpertsoft.com/faq-1-install/](http://www.bnhexpertsoft.com/faq-1-install/).

- **Context Sensitive Online Help** can be displayed for each screen by clicking on [Help]. Context sensitive video clips are also embedded throughout ADVISOR and can be viewed by clicking on the video 🎥 icon.
 Basic Excel Data Collection Forms for various ADVISOR data elements along with data import instructions are available online at: http://www.bnhexpertsoft.com/data-collection-forms-scope-version-12/.

 Detailed Excel Data Collection Forms for Project Tasks, System/Competency Tasks and Job Tasks along with data import instructions are available online at: http://www.bnhexpertsoft.com/detailed-data-collection-forms-version-12/.

 Sample Reports from each module are available online at: http://www.bnhexpertsoft.com/reports/.

 Technical Support: Available 8:00 am to 6:00 pm EST by calling 1 (514) 745-4010. You may also fax your questions to 1 (514) 745-4011 or E-mail to support@bnhexpertsoft.com.

1.9 References


Chapter 2: Define Problem

2.1 Introduction

"I need a training program on ..." is often the opening statement in what turns out to be a costly, frustrating and unsuccessful campaign to achieve the desired performance. The rational for training seems clear. We are implementing a new system, receiving too many complaints from our clients, not selling enough products, etc.

Prominent researchers have demonstrated that most performance deficiencies in the workplace are due to environmental factors which include vague expectations, insufficient and untimely feedback, limited access to required information, inadequate tools, resources and procedures, inappropriate and counterproductive incentives, etc. Yet, when a performance gap occurs, the default intervention is all too often training – although it is much easier to fix the environment than people. To put it in simple terms – if the performance gap is not due to a lack of skills and knowledge, don’t train!

Even when you determine that training is necessary, is it sufficient? A training injection on its own, rarely works if it is not part of a total performance system.

ADVISOR is a powerful Training Management System (TMS). It analyzes a performance deficiency, detects the source of the problem, identifies solutions – including training – that can produce the desired level of productivity and recommends actions to maximize your return on investment (ROI). ADVISOR is based on the published work of several experts in the field of Human Performance Technology including Zemke & Kramlinger (1982), Rummler & Brache (1995), Pipe & Mager (1999), Harless (2000), and Weisbord (2002). It guides you through the entire needs assessment process, offers valuable insights on what should be taken into consideration and why, and most importantly, it is simple to use.

Moreover, ADVISOR generates concise reports to effectively communicate the results to others and support your decision. With ADVISOR you will never have to wonder whether you have made the right choice.
To determine how much time and resources should be allocated to a perceived problem/opportunity, the scope of the problem/opportunity should first be defined and the assumptions validated. In other words, who initiated the request for the analysis or training, and for what reason? Based on circumstantial evidence and constraints, the validity of the request can be evaluated, the impact of the problem or the value of the opportunity estimated and the need for further analysis confirmed.
2.2 Setup New Projects

**Step 1:** To create a new Project, click on the Projects folder.
**Step 2:** Click [Add].
**Step 3:** Input the Project Title, Overview, Contact Name, how the performance deficiency will be assessed (i.e., based on missions/goals or jobs) as well as other info. Data required by ADVISOR is identified by a red asterisk (*). Of course, the more data you provide, the better the results.

Note:

- To facilitate data sharing and minimize the effort required to conduct Needs Assessment, the analysis can be made available to all Users or Users assigned to the Client by setting the Status to "Public". In this case, Users can search and make a copy of your analysis for personal use, but cannot edit or delete your data. If the Status is set to “Private”, the analysis will not be accessible through the search function.

- Each Project can be archived as many times as you need. Once an analysis is archived, changes to the current analysis will not impact data in archived versions. To archive an analysis, click on the (project title) node, then click on the [Archive] tab, input the Version Title and click [Save]. The date on which the archive was created is automatically saved with the Version Title. A list of archived versions is available under the [View] tab. You may view an archived version in read only mode by placing checkmark next to its title and clicking [Save]. You can delete as well as recover an archived version (i.e., overwrite existing version) by clicking on corresponding tabs. Of course, if an analysis is deleted, all archived versions of the analysis are automatically deleted as well.
Chapter 3: Missions/Goals Analysis

3.1 Introduction

The following approach is used if Mission is selected as the source of Performance Deficiency for the project (Section 2.2 Setup New Projects). Refer to Chapter 4: Assess Jobs Performance, if Job is selected as the source of Performance Deficiency.
3.2 Add Missions/Goals

To investigate the gaps between desired and actual performance key parameters should 1st be defined within a Project. These include Missions/Goals (i.e., what we are trying to achieve), and Tasks needed to achieve these Missions/Goals.

To identify Missions/Goals with a performance deficiency:

Step 1: Click on ▶ next to the (project title) node to expand.
Step 2: Click on the Mission Analysis folder.
Step 3: Click [Add].
Step 4: Input the Mission/Goal Title, Evaluation Date, Trigger (i.e., reason for initiating the assessment), Actual Performance vs. Desired Performance, Impact, and if the performance gap is significant. Data required by ADVISOR is identified by a red asterisk (*). Of course, the more data you provide, the better the results.
Step 5: Click [Save].

Notes:

➢ The Actual Performance should be reported in a similar format to the Desired Performance to facilitate the identification of the performance gap.

➢ If the Performance Gap is Acceptable or Not Applicable, then there is no need to carry on further with the analysis.
To input evidence supporting the current level of performance:

**Step 6:** Click on the **[Evidence]** tab.

**Step 7:** Input evidence and date.

**Note:**
- Evidence should supplement the initial event that triggered the evaluation. Evidence may include:
  - Line manager's comments
  - Individual personnel comments
  - Audits or inspections
  - Changes in policies
  - Safety reports
  - Lessons learned reports
  - Unit readiness reports
  - Material readiness reports
  - Introduction of a new piece of equipment
  - Identification of a new or changed competitor
  - Introduction of new job or restructuring of existing job profiles (specialty codes)
To input the reliability of collected or examined evidence:

**Step 8:** Click on the [Reliability] tab.

**Step 9:** Input factors considered in assessing the reliability of the evidence.

### Note:
- The following factors should be considered when evaluating the reliability of formal and informal data:

**Formal Reports:**
- Availability of supporting data
- Sample size and use of statistical procedures
- Sample size and assumptions related to the scalability of the problem
- Differing opinions
- Degree to which report confirms hypothesis
- Degree to which report confirms other assessments or actions
- Precision of collected data
- Reasoning used to draw conclusions
- Expert’s collaboration

**Informal Data**
- Personal knowledge of individuals providing the data
- Level of detail
- Relationship to Task
- Availability or lack of supporting data
- Sample size and assumptions related to the scalability of the problem
- Differing opinions
- Degree to which data confirms hypothesis
- Degree to which data confirms other assessments or actions
To document problems encountered in collecting data and venues used to overcome difficulties:

**Step 10:** Click on the [Difficulties] tab.

**Step 11:** Describe difficulties encountered in data collection.

**Step 12:** Click [Save].

### 3.3 Search/Copy Missions/Goals

To minimize duplication, Missions/Goals that have been created under the [Analyze] tab (please refer to ADVISOR Mission Analysis Step by Step Guide or ADVISOR Training Analysis User Guide), can be easily assessed and copied under the **Scope** tab as follows:

**Step 1:** Click on the ![Mission Analysis folder](image).

**Step 2:** Click on the [Search] tab.

**Step 3:** Select the desired search criterion, i.e. Project or Keyword.

**Step 4:** Click [Save].
Step 5: Select Project.
Step 6: Click [Save].

Step 7: Select the desired Mission.
Step 8: Click [Save].

Selected Mission/Goal along with attributes and corresponding Tasks are copied.
Chapter 4: Job Analysis

4.1 Introduction

The following approach is used if Job is selected as the source of Performance Deficiency for the project (Section 2.2 Setup New Projects). Refer to Chapter 3: Assess Missions/Goals Performance, if Mission is selected as the source of Performance Deficiency.
4.2 Add Jobs/Roles

To zero in on the source of the problem, all Tasks that could impact the problem/issue under investigation along with who is responsible for performing them should be identified. To add a new Job:

- **Step 1:** Click on the Job Analysis folder.
- **Step 2:** Input the Job Title, Overview, Number of Employees, as well as other info.
- **Step 3:** Click [Save].

4.3 Search/Copy Jobs/Roles

To minimize duplication, Jobs/Roles that have been created under the [Analyze] tab (please refer to ADVISOR Job Analysis Step by Step Guide or ADVISOR Training Analysis User Guide), can be easily assessed and copied under the Scope tab as follows:

- **Step 1:** Click on the Job Analysis folder.
- **Step 2:** Click on the [Search] tab.
- **Step 3:** Select the desired search criterion, i.e. Project or Keyword.
- **Step 4:** Click [Save].
Step 5: Select Project.
Step 6: Click [Save].

Step 7: Select the desired Job.
Step 8: Click [Save].

Selected Job along with attributes and corresponding Tasks are copied.
Chapter 5: Task Analysis

5.1 Introduction

Regardless of the approach used to zero in on the source of the problem (i.e., Missions/Goals or Jobs); identifying the underlying Tasks for each mission/goal or the Tasks performed by each Job/Role, including performance gaps/deficiencies are needed to zero in on the source of the problem and identify plausible solutions.
5.2 Add Tasks

To identify the underlying Tasks for each Mission/Goal or Tasks performed by each Job/Role:

**Step 1:** Click on the **Tasks Analysis** folder.

**Step 2:** Click [Add].

**Step 3:** Input the Task Title, Evaluation Date, Actual Performance vs. Desired Performance, the Impact of the Performance Gap, whether Performance Gap is significant, and the need to Perform Root Cause Analysis.

**Step 4:** Click [Save].

**Notes:**

- Similar to Missions/Goals, you can click on the [Evidence], [Reliability] and [Difficulties] tabs to capture pertinent information for each Task.

- To facilitate data sharing and minimize the analysis effort, Users can search for and copy Tasks including attributes using the [Search] tab under the **Tasks** folder. Once again, please note that this does not imply that users can modify the original data.

- To edit the attributes of multiple Tasks, click on the **Edit All** icon.
5.3 Conduct Root Cause Analysis

Should the evaluation reveal a performance deficiency – i.e., a gap between the desired and actual Task performance, a root cause analysis should be conducted to determine the source of the problem, which may include: lack of knowledge and skills, misunderstanding of job functions, misinterpretation of rules/regulations, access to tools, conflict with colleagues, and so on – as well as identify and rate plausible solutions in terms of their power to bridge the performance gap. In addition to training and job aids, plausible solutions may include task, job and/or organizational redesign, new/improved tools, policies/procedures, incentive system and hiring practices.
5.4 Data Collection Methods

Root cause analysis is based upon informative clues, much like putting together pieces of a puzzle. It is very helpful in exposing key issues behind a performance deficiency. Several methods can be utilized to acquire the necessary data. Each method has both advantages and limitations, and in many cases a combined methodology may provide the most effective approach to uncover the reasons behind a problem. The following methods of collecting data are suggested for your consideration:

- **Individual Interviews** – a common tool used to obtain optimal, actual, opinions, attitudes and possible causes/solutions for a problem.
- **Focus Groups** – provide a cost-effective way to secure and circulate information as well as bring people onboard when new ideas may be adopted.
- **Document Searches** – to uncover facts about the current operation that may not surface during interviews. For example, critical incident reports or production figures can provide a good assessment of the current situation.
- **Observations** – of employees on the job can reveal minute and subtle details of performance inadequacies or strengths.
- **Questionnaires & Surveys** – are a less obtrusive way to procure the same information generated by other methods. Moreover, they usually take up less time from participants.
- **Nominal Groups** – provide a forum for collecting and prioritizing findings about the nature and resolution of the problem(s).

5.5 Data Collection Questionnaires

To facilitate the data collection process, six questionnaires have been provided in Annex A. The forms may be completed during an interview or observation session, or handed out to participants.

Since collected data is required by the Root Cause Analysis module (Section 5.6), summary forms for each questionnaire are also included in Annex A, to assist in compiling data retrieved from multiple respondents.
5.6 Uncover Plausible Solutions

If the evaluation revealed a performance deficiency – i.e., a gap between desired and actual Task performance, root cause analysis is needed to determine the source of the problem and plausible solutions – which may include training, job aids, tools, changes to policies/procedures, and so forth. To initiate the analysis:

Step 1: Click on ► next to the (task) node to expand.

Step 2: Click on ► next to the Root Cause Analysis folder to display the following eight (8) sections – Employees, Supervisors, Feedback, Policies, Tools, Tasks, Environment and Recruitment.

Step 3: Click on the Employees node.

Step 4: Input Employees’ related data such as Qualifications and adequacy of Knowledge and Skills, understanding of Policies, Interpersonal Skills, dependency and access to Tools, quality of Feedback received, attitude towards Incentives systems, and Job Satisfaction by clicking on the corresponding tabs.

Step 5: Click Save.

Notes:

➢ Keep in mind that all questions are related to a specific Task.

➢ All fields under Supervisors, Feedback, Policies, Tools, Tasks, Environment and Recruitment nodes should also be completed for the most accurate assessment of plausible solutions.

➢ To facilitate data collection, six questionnaires have been provided in Annex A. The forms may be completed during an interview or observation session, or handed out to participants to complete.
Step 6: Click the **Plausible Solutions** node to view plausible solutions along with rating.

**Step 7:** To find out why a solution has been proposed, click on the solution title. The reasons, based on information provided, are presented at the bottom of the screen.

**Notes:**

- You may remove plausible solutions recommended by ADVISOR by setting their impact to blank (null) and locking your selection; or recommending alternate solutions, by indicating their impact and locking your selection. Click **Save** to update plausible solutions list.

- Plausible solutions may not necessarily be recommended. Final recommendations take into account the feasibility of implementing plausible solutions as well as their cost.
5.7 Generate Root Cause Analysis Report

A comprehensive business case report that documents the root cause analysis of mission/goal or job performance gaps along with plausible solutions can be generated as follows:

**Step 1:** Click on the **Root Cause Analysis Report** node.
**Step 2:** Select items to be included.
**Step 3:** Click **[Save]**.
Chapter 5: Task Analysis

The report is presented in html format, in a new window. You may print or save the report using the corresponding functions in your Browser. Since the report is in html format, you can quickly advance to any section by clicking on the corresponding title in the Table of Contents.

**Step 4:** To generate the report in Word click on [Generate Word Doc] button.

**Step 5:** To return to ADVISOR, close the Report window.
Chapter 6: Prioritize Solutions

6.1 Rate Plausible Solutions

To review and prioritize plausible solution.

You can input costs of each solution along with a comment and prioritize each action as follows:

**Step 1:** Click on the **Prioritize Solutions** node to display Missions or Jobs, along with corresponding Tasks, Impact of Performance Deficiency/Gap and Plausible Solutions.

**Step 2:** For each solution, input the Rough Order Magnitude (ROM) Costs, clarifying comments, if needed, and prioritize each solution as high, medium or low under the **Rating** field based costs and potential benefits.

**Step 3:** Click [Save].
Chapter 7: Generate Reports

7.1 Needs Assessment Report

A comprehensive report of identified Performance Deficiencies for all Missions, Jobs and Tasks, including Plausible Solutions and recommended actions can be generated as follows:

Step 1: Click on ► next to the Reports folder to expand.
Step 2: Click on the Needs Assessment Report node.
Step 3: Input relevant Management, Assumptions, Constraints, Methodology, Policies, Risk, Timelines, etc., info.
Step 4: Click [Save] to generate Report.
The report is presented in html format, in a new window. You may print or save the report using the corresponding functions in your Browser.

**Step 5:** To generate the report in Word click on [Generate Word Doc] button.

**Step 6:** To return to ADVISOR, close the Report window.
Annex A: Data Collection Forms

Employees Questionnaire

Unit/Division: ____________________________________
Job (Occupation): ____________________________________
Task: ____________________________________
Date: ____________________________________
Name (optional): ____________________________________

Directions: Read each statement carefully and place checkmark in column that represents your response. If the statement does not apply to you, please leave the space blank. Thank you.

<table>
<thead>
<tr>
<th>Employees Questionnaire</th>
<th>Disagree</th>
<th>Slightly Disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Aware of Policies</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I can list all policies and procedures that relate to the Task</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I understand the reasons behind all policies and procedures relating to Task</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am supportive of existing policies and procedures for this Task</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I can describe the level of performance expected of me for this Task</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I can explain how my performance is evaluated/measured for this Task</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Get Along with Colleagues</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I require help or additional resources from fellow employees in order to perform this Task</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I get along quite well with co-workers and superiors</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My performance of this Task is not diminished by the relations I have with my supervisor/manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Need for Tools</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The tools and/or materials that I depend on to perform this Task are readily available</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Receive Adequate Feedback</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal procedure is in place to provide me feedback on my performance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Constructive feedback is offered on working relationships with colleagues</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Employees Questionnaire (continued)

<table>
<thead>
<tr>
<th><strong>Motivated by Incentive System</strong></th>
<th>Disagree</th>
<th>Slightly Disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am motivated by the long-term incentives offered for meeting expectations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The system for delivering reprimands is constructive, fair and improves productivity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>There are clear short-term incentives for achieving the expected level of output</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Short-term rewards encourage me day by day to be more productive</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Enjoy my Job</strong></th>
<th>Disagree</th>
<th>Slightly Disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>The work I carry out is gratifying and makes a difference for those around me and beyond</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am given too much work on a regular basis, which reduces the quality I can provide</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Attitude Towards Supervisor</strong></th>
<th>Disagree</th>
<th>Slightly Disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>My supervisor brings out the best in me</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>If I need guidance and support from my supervisor, he/she is seldom available to provide advice</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Attitude Towards Feedback</strong></th>
<th>Disagree</th>
<th>Slightly Disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>The information I receive about the Task performance allows me to accurately adjust my actions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The level of performance expected of me for this Task, and how to achieve it is clear</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feedback on this Task is given in time to allow me to make improvements</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Constructive feedback on how to get along with others is provided regularly</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advice I receive on interactions with others indicates what is acceptable behavior</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feedback is given in a timely manner to enable me to maintain acceptable behavior</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Attitude Towards Task</strong></th>
<th>Disagree</th>
<th>Slightly Disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I find that the Task challenging and it maintains my interest</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Employees Questionnaire Summary

Unit/Division: ________________________________
Job (Occupation): ________________________________
Task: ________________________________
Date: ________________________________

Directions: Tally the responses. The Consensus should reflect the response with the highest value. Input the result in the corresponding field in the Root Cause Analysis (Section 5.6).

<table>
<thead>
<tr>
<th>Summary of Responses</th>
<th># that Disagree</th>
<th># that Slightly Disagree</th>
<th># that Agree</th>
<th>Consensus</th>
</tr>
</thead>
<tbody>
<tr>
<td>I can list all policies and procedures that relate to the Task</td>
<td>2</td>
<td>0</td>
<td>8</td>
<td>Agree</td>
</tr>
<tr>
<td>I understand the reasons behind all policies and procedures relating to Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am supportive of existing policies and procedures for this Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I can describe the level of performance expected of me for this Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I can explain how my performance is evaluated/measured for this Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I require help or additional resources from fellow employees in order to perform this Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I get along quite well with co-workers and superiors</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My performance of this Task is not diminished by the relations I have with my supervisor/manager</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The tools and/or materials that I depend on to perform this Task are readily available</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal procedure is in place to provide me feedback on my performance</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Constructive feedback is offered on working relationships with colleagues</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am motivated by the long-term incentives offered for meeting expectations</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The system for delivering reprimands is constructive, fair and improves productivity</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>There are clear short-term incentives for achieving the expected level of output</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Summary of Responses</td>
<td># that Disagree</td>
<td># that Slightly Disagree</td>
<td># that Agree</td>
<td>Consensus</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------------------</td>
<td>-----------------</td>
<td>--------------------------</td>
<td>--------------</td>
<td>-----------</td>
</tr>
<tr>
<td>Short-term rewards encourage me day by day to be more productive</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The work I carry out is gratifying and makes a difference for those around me and beyond</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am given too much work on a regular basis, which reduces the quality I can provide</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My supervisor brings out the best in me</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>If I need guidance and support from my supervisor, he/she is seldom available to provide advice</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The information I receive about the Task performance allows me to accurately adjust my actions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The level of performance expected of me for this Task, and how to achieve it is clear</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feedback on this Task is given in time to allow me to make improvements</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Constructive feedback on how to get along with others is provided regularly</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advice I receive on interactions with others indicates what is acceptable behavior</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feedback is given in a timely manner to enable me to maintain acceptable behavior</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I find that the Task challenging and it maintains my interest</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Human Resources Questionnaire

Unit/Division: __________________________________________________________________________
Job (Occupation): ________________________________________________________________________
Task __________________________________________________________________________________
Date: __________________________________________________________________________________
Name (optional): _________________________________________________________________________

Directions: Read each statement carefully and place checkmark in column that represents your response. If the statement does not apply to you, please leave the space blank. Thank you.

<table>
<thead>
<tr>
<th>Human Resources Questionnaire</th>
<th>Disagree</th>
<th>Slightly Disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees have Knowledge &amp; Skills</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees have the necessary knowledge, skills and/or experience to do the Task</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less training would be needed if more qualified candidates are hired</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees Job Satisfaction</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The number of employees leaving the organization is at the expected level</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The degree to which employees are dismissed has not changed appreciably</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Environment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The number of new employees hired within the past year is higher than normal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruitment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees for this Task are hired internally by our organization</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Only individuals with required qualifications and experience are hired</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Human Resource Questionnaire Summary

Unit/Division: ____________________________________________
Job (Occupation): _________________________________________
Task ____________________________________________________
Date: ____________________________________________________

Directions: Tally the responses. The Consensus should reflect the response with the highest value. Input the result in the corresponding field in the Root Cause Analysis (Section 5.6).

<table>
<thead>
<tr>
<th>Summary of Responses</th>
<th># that Disagree</th>
<th># that Slightly Disagree</th>
<th># that Agree</th>
<th>Consensus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees have the necessary knowledge, skills and/or experience to do the Task</td>
<td>8</td>
<td>1</td>
<td>1</td>
<td>Disagree</td>
</tr>
<tr>
<td>Less training would be needed if more qualified candidates are hired</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The number of employees leaving the organization is at the expected level</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The degree to which employees are dismissed has not changed appreciably</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The number of new employees hired within the past year is higher than normal</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees for this Task are hired internally by our organization</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Only individuals with required qualifications and experience are hired</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Subject Matter Expert Questionnaire

Unit/Division: ________________________________
Job (Occupation): ________________________________
Task: ________________________________
Date: ________________________________
Name (optional): ________________________________

Directions: Read each statement carefully and place checkmark in column that represents your response. If the statement does not apply to you, please leave the space blank. Thank you.

<table>
<thead>
<tr>
<th>Subject Matter Expert Questionnaire</th>
<th>Disagree</th>
<th>Slightly Disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tools</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tools for Task are reliable, function properly and meet expectations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>One or more crucial pieces of equipment or material needed by employees to perform Task is missing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Existing tools and materials permit personnel to meet performance objectives for Task</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees can easily and quickly locate all necessary tools and materials for Task</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Modernization of some equipment or materials would improve workmanship and Task productivity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Employees Dependency on Tools</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personnel need the equipment to perform the Task</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Tasks</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Errors in performing this Task among this group of employees will have serious consequences</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Task level of complexity is considerably high, and mistakes can occur easily</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Task or procedures carried out by employees can be greatly simplified</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Subject Matter Expert Questionnaire Summary

Unit/Division: ________________________________________________
Job (Occupation): ________________________________________________
Task: ________________________________________________
Date: ________________________________________________

Directions: Tally the responses. The Consensus should reflect the response with the highest value. Input the result in the corresponding field in the Root Cause Analysis (Section 5.6).

<table>
<thead>
<tr>
<th>Summary of Responses</th>
<th># that Disagree</th>
<th># that Slightly Disagree</th>
<th># that Agree</th>
<th>Consensus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tools for Task are reliable, function properly and meet expectations</td>
<td>8</td>
<td>1</td>
<td>1</td>
<td>Disagree</td>
</tr>
<tr>
<td>One or more crucial pieces of equipment or material needed by employees to perform Task is missing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Existing tools and materials permit personnel to meet performance objectives for Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees can easily and quickly locate all necessary tools and materials for Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Modernization of some equipment or materials would improve workmanship and Task productivity</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personnel need the equipment to perform the Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Errors in performing this Task among this group of employees will have serious consequences</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Task level of complexity is considerably high, and mistakes can occur easily</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Task or procedures carried out by employees can be greatly simplified</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Supervisor Questionnaire**

Unit/Division: ____________________________  
Job (Occupation): ____________________________  
**Task**  
Date: ____________________________________  
Name (optional): ____________________________

Directions: Read each statement carefully and place checkmark in column that represents your response. If the statement does not apply to you, please leave the space blank. Thank you.

<table>
<thead>
<tr>
<th>Employees Qualifications</th>
<th>Disagree</th>
<th>Slightly Disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task is performed by employees correctly most of the time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>In the past, Task was performed correctly by personnel most of the time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personnel know the procedures for optimal performance of Task</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees have the ability to perform Task to the expected standard</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Employees Awareness of Policies                  |          |                   |       |
| Personnel can list all policies and procedures related to the Task |          |                   |       |
| Personnel can explain the main ideas behind all policies and procedures relevant to the Task |          |                   |       |
| Employees can follow required policies and procedures correctly for Task |          |                   |       |

| Policies Impact                                  |          |                   |       |
| Policies and procedures have minimal impact on how employees perform Task |          |                   |       |

| Employees Interpersonal Skills                   |          |                   |       |
| Delays in Task performance are mostly caused by other groups of employees |          |                   |       |
| Interpersonal relations among employees are entirely acceptable |          |                   |       |
| Personnel interpersonal relations have a significant impact on Task performance |          |                   |       |

| Employees Dependency on Tools                    |          |                   |       |
| Employees can only perform Task to desired standard if they have the required tools |          |                   |       |
| Employees can use the equipment and/or materials required for Task efficiently and effectively |          |                   |       |
### Supervisor Questionnaire (continued)

<table>
<thead>
<tr>
<th></th>
<th>Disagree</th>
<th>Slightly Disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employees Incentives System</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outstanding personnel performance is rewarded regularly</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees are informed of their poor performance and encouraged to improve</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individuals or teams that complete their work in advance are given less rewarding Tasks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Employees Job Satisfaction</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees are complaining that their responsibilities do not correspond to the job description</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complacency is running high in the workplace, resulting in overall disenchantment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Supervisors Awareness of Policies</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I can list all the policies and procedures that relate to the Task</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I can explain the meaning behind all policies and procedures relating to the Task</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am able to use and apply all policies and procedures that impact the Task</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implementing the performance related incentive system correctly is not a problem</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I find employees performance of the Task significantly less satisfactory than previous years</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I have full control of my operation with minimal problems, and an awareness of related projects</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>There is a lack of time in order to properly address key tasks</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Supervisor Questionnaire Summary

Unit/Division: __________________________________________
Job (Occupation): __________________________________________
Task: __________________________________________
Date: __________________________________________

Directions: Tally the responses. The Consensus should reflect the response with the highest value. Input the result in the corresponding field in the Root Cause Analysis (Section 5.6).

<table>
<thead>
<tr>
<th>Summary of Responses</th>
<th># that Disagree</th>
<th># that Slightly Disagree</th>
<th># that Agree</th>
<th>Consensus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task is performed by employees correctly most of the time</td>
<td>3</td>
<td>1</td>
<td>6</td>
<td>Agree</td>
</tr>
<tr>
<td>In the past, Task was performed correctly by personnel most of the time</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personnel know the procedures for optimal performance of Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees have the ability to perform Task to the expected standard</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personnel can list all policies and procedures related to the Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personnel can explain the main ideas behind all policies and procedures relevant to the Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees can follow required policies and procedures correctly for Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Policies and procedures have minimal impact on how employees perform Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delays in Task performance are mostly caused by other groups of employees</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interpersonal relations among employees are entirely acceptable</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personnel interpersonal relations have a significant impact on Task performance</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees can only perform Task to desired standard if they have the required tools</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees can use the equipment and/or materials required for Task efficiently and effectively</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outstanding personnel performance is rewarded regularly</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees are informed of their poor performance and encouraged to improve</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individuals or teams that complete their work in advance are given less rewarding Tasks</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees are complaining that their responsibilities do not correspond to the job description</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complacency is running high in the workplace, resulting in overall disenchantment</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Summary of Responses</td>
<td># that Disagree</td>
<td># that Slightly Disagree</td>
<td># that Agree</td>
<td>Consensus</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------------------</td>
<td>-----------------</td>
<td>--------------------------</td>
<td>--------------</td>
<td>-----------</td>
</tr>
<tr>
<td>I can list all the policies and procedures that relate to the Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I can explain the meaning behind all policies and procedures relating to the Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am able to use and apply all policies and procedures that impact the Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implementing the performance related incentive system correctly is not a problem</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I find employees performance of the Task significantly less satisfactory than previous years</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I have full control of my operation with minimal problems, and an awareness of related projects</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>There is a lack of time in order to properly address key tasks</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Instructor Questionnaire

Unit/Division: ___________________________________________
Job (Occupation): ___________________________________________
Task ___________________________________________
Date: ___________________________________________
Name (optional): ___________________________________________

Directions: Read each statement carefully and place checkmark in column that represents your response. If the statement does not apply to you, please leave the space blank. Thank you.

<table>
<thead>
<tr>
<th>Instructor Questionnaire</th>
<th>Disagree</th>
<th>Slightly disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees Interpersonal skills</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees are given adequate opportunities to learn interpersonal skills</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tasks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The training materials for these employees is less than one year</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Environment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A new system or technology that impacts Task was introduced within the last twelve months</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Impact of new system or technology on Task is significant</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal training was given to personnel on how to successfully implement the new system</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New or improved work procedures that impact Task have been introduced within the past year</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal training was provided on how to apply the new work procedures</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal training was provided for new employees on how to perform the Task</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Instructor Questionnaire Summary

Unit/Division: ____________________________________________
Job (Occupation): __________________________________________
Task: ____________________________________________
Date: ____________________________________________

Directions: Tally the responses. The Consensus should reflect the response with the highest value. Input the result in the corresponding field in the Root Cause Analysis (Section 5.6).

<table>
<thead>
<tr>
<th>Summary of Responses</th>
<th># that Disagree</th>
<th># that Slightly Disagree</th>
<th># that Agree</th>
<th>Consensus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees are given adequate opportunities to learn interpersonal skills</td>
<td>8</td>
<td>1</td>
<td>1</td>
<td>Disagree</td>
</tr>
<tr>
<td>The training materials for these employees is less than one year</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A new system or technology that impacts Task was introduced within the last twelve months</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Impact of new system or technology on Task is significant</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal training was given to personnel on how to successfully implement the new system</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New or improved work procedures that impact Task have been introduced within the past year</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal training was provided on how to apply the new work procedures</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal training was provided for new employees on how to perform the Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Senior Executives Questionnaire

Unit/Division: ________________________________________________________________
Job (Occupation): ______________________________________________________________
Task: ______________________________________________________________________
Date: ______________________________________________________________________
Name (optional): ______________________________________________________________

Directions: Read each statement carefully and place checkmark in column that represents your response. If the statement does not apply to you, please leave the space blank. Thank you.

<table>
<thead>
<tr>
<th>Senior Executives Questionnaire</th>
<th>Disagree</th>
<th>Slightly Disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The unit/division effectively implements its strategic goals for these employees</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Too many changes are required to implement different procedures for a new system</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The unit/division has adapted quickly to changes in the work environment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees Incentive System</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A formal performance based incentive system is available for this occupation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Policies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A detailed description of standards and policies for this Task is available</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Policies and procedures can easily be followed by employees to detect and correct skill gaps</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rules and regulations must be strictly followed for employees to attain optimal productivity for Task</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A method or tool exists to accurately measure personnel Task performance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The measurement of personnel proficiency in performing Task is reliable and consistent</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Guidelines for employees are obsolete or invalid, and they actually interfere with their performance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overlap in policies or procedures are contributing to delays</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Repetition in procedures are wasting time, money and resources</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Senior Executives Questionnaire Summary

Unit/Division: __________________________________________
Job (Occupation): __________________________________________
Task: __________________________________________
Date: __________________________________________

Directions: Tally the responses. The Consensus should reflect the response with the highest value. Input the result in the corresponding field in the Root Cause Analysis (Section 5.6).

<table>
<thead>
<tr>
<th>Summary of Responses</th>
<th># that Disagree</th>
<th># that Slightly Disagree</th>
<th># that Agree</th>
<th>Consensus</th>
</tr>
</thead>
<tbody>
<tr>
<td>The unit/division effectively implements its strategic goals for these employees</td>
<td>8</td>
<td>1</td>
<td>1</td>
<td>Disagree</td>
</tr>
<tr>
<td>Too many changes are required to implement different procedures for a new system</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The unit/division has adapted quickly to changes in the work environment</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A formal performance based incentive system is available for this occupation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A detailed description of standards and policies for this Task is available</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Policies and procedures can easily be followed by employees to detect and correct skill gaps</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rules and regulations must be strictly followed for employees to attain optimal productivity for Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A method or tool exists to accurately measure personnel Task performance</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The measurement of personnel proficiency in performing Task is reliable and consistent</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Guidelines for employees are obsolete or invalid, and they actually interfere with their performance</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overlap in policies or procedures are contributing to delays</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Repetition in procedures are wasting time, money and resources</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>