



How To Set Up And Run A Certification Management Board

Training Application Notes

MOITAN012

Purpose

This document explains how to set up and run a certification management board in a company.

A certification management board oversees training and certification to ensure they are focused on supporting business goals and needs.

Overview

It is without doubt that the majority of corporate CEOs and executive teams will assert that they attach a high value to the education and development of their company's employees when queried on the subject.

Rarely, though, does this assertion translate into the kind of action that results in real returns. Indeed, how many of us have not seen those "management-by-objective" performance appraisals, which list those vague, unsatisfying development goals (not to mention work goals) like "learn more about marketing"? With billions of dollars being wasted every year on *vagueness*, one has to ask oneself, "How can the best of intentions yield such poor results?"

There are many reasons for this, of course. On the day-to-day, practical level, training is sometimes treated as little more than a bureaucratic requirement. Other times it is used as a reward — as a bonus vacation day away from the office — and not for educational purposes at all. More often than not, though, the training people receive simply proves irrelevant to their jobs, or is not reinforced by on-the-job practices, and this fact is just "glossed over."

In the end, underlying all these reasons is, perhaps, the ultimate reason why such good intentions fail — and that reason is a lack of management focus and training know-how.

Executive management often thinks of training and personnel development as an activity that can be delegated, requiring no executive input or commitment. But this is not true. For training and personnel development efforts to have a beneficial impact, they must be directed at a business' goals; they must be managed as carefully as inventory and cash flow. This means that management must have input, as well as insight, into those efforts. Without management attention, training is, indeed, cast adrift, and then its impact becomes *negative* in terms of both time and money.

So what can be done, from a management perspective, to get and keep training and development efforts on track? The answer is, senior executives need to put training and development on the business calendar. And one of the best ways to do this is to establish a *certification management board*.

The duty of a certification management board is to discuss and evaluate a company's training and development efforts as a business operation and to answer the six basic questions of business planning:

1. Where are we **now**?
2. Where do we want to **go**?
3. **How** do we intend to get there?
4. **When** will we arrive?
5. **Who** is responsible? and
6. How much will it **cost**? —Can we afford it?

Then with those goals in mind, the certification management board's purpose is to manage a company's training and personnel development efforts towards that ultimate training goal, certification.

It should be noted that the key word here is *manage*. A certification board should not be about doing the actual training and certification. It should be about guiding these activities in directions that will help your company attain its business goals and then measuring and examining progress to make sure those goals are really being achieved.

In the following section, we will discuss certification management boards further, including what must be understood and done to set up and maintain one to help your company ensure it gets value for its training dollars.

Discussion

Benefits

A certification management board, with senior executives participating, has several benefits.

First, a board ensures that a company's training activities are aligned with its business' goals. That is, having a board means that training sets goals and is a proactive force, rather than a reactive one, which is always a step behind.

Second, a board provides the needed authority to deal with issues that arise and make decisions regarding trade-offs between training and work, resources, etc.

Third, it actively promotes training and development, and makes it a priority, functioning part of the business.

And finally, it provides executives and personnel with the opportunity to interact and discover, from each other, what good training is and what it can do for the business.

Board Mission

The mission of a certification management board is to proactively manage the training and development of employees and ensure that they can perform the Job Tasks they are required to do, as measured by certification.

It should be noted that more training is not always required to ensure performance. It is the task of a certification management board to determine what is needed, when it is needed and in what priority.

All board members should understand and support this mission.

Responsibilities

A certification management board is responsible for the governance of the certification process and the management of policy

in consideration of business needs and risks. It sets certification priorities, certification goals, employee development objectives, and confirms certifiers. That is, it determines how many certifications should take place each quarter and the areas (Job Task Groups) in which students must be trained and certified first.

All board members should understand and support these responsibilities.

Delegated Responsibilities

It is important to point out, again, that the board is not expected to certify certifiers or employees. Rather, new certifiers should be tested and appointed by standing certifiers on the behalf of the board. Note, however, that the board must confirm that candidate certifiers have the ability to support the company's certification program. For example, a subject matter expert may be brilliant, but not suited to certifying others, especially if he/she is strongly anti-management.

The responsibility of certifying certifiers and employees should be delegated as follows:

- The board should identify and appoint two initial subject matter experts as certifiers, who will become responsible for certifying individual employees.
- If an additional certifier is required, a candidate should be identified and certified by both of the standing certifiers.
- All additional certifiers thereafter can be identified and tested by any two of the standing certifiers.

Please note that all approved certifiers should be ratified by the board.

Note also that all training instructors should be certifiers, but not all certifiers are required to be instructors.

Board Members

Each board member is responsible for ensuring that the needs and issues of his/her area are considered when the certification goals, objectives, and priorities are decided.

Board members should include:

- The chairperson, who has "P&L (profit and loss) responsibility" for training and who can provide insight into the overall impact of any decisions taken.
- The training executive, who is responsible for the daily operations of training and running the board meetings.

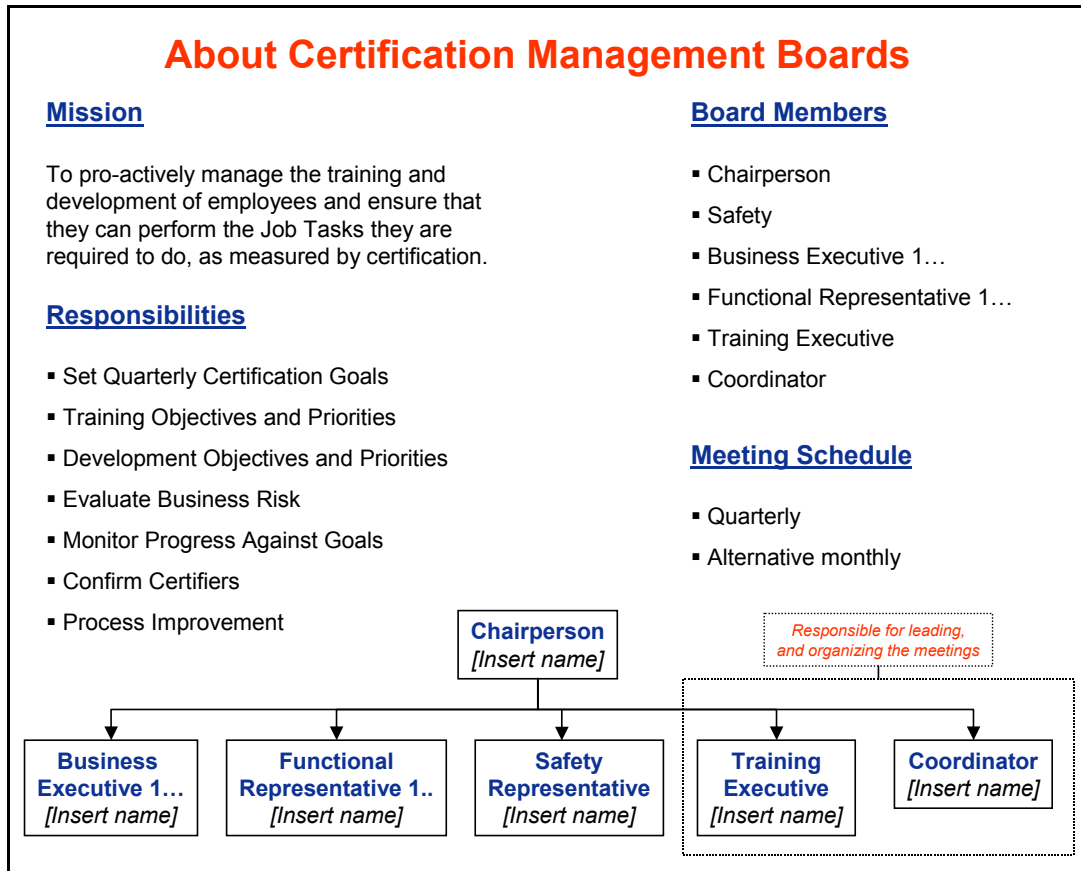


Figure 1: This figure shows a slide summarizing the mission, responsibility, membership make-up, and the meeting schedule for a certification management board. A slide such as this one can be very useful when putting together your own board and for reminding members, at the start of board meetings, what the charter of the certification management board is.

- The coordinator, who is responsible for keeping records and sending out meeting notices, etc.
- Appropriate business executives, whose areas of responsibility depend upon and are affected by training.
- Functional representatives, who should be persons from interested company departments/functions and who are actually participating in training.
- A representative for Safety, who can identify important safety issues that mandate and affect training.

For example, a board might include the Customer Service Vice President, the Training Executive, a Safety Specialist, the Manager of Field Service, and a Field Service Engineer, as well as the training administrative assistant acting as the board coordinator.

When a Board Must Meet

A certification management board must meet at least once every quarter to review the goals, objectives, and priorities. It can meet more often when required; for example, a board might meet monthly.

Meetings should be no longer than a one to two hours.

Running Board Meetings

A sample board agenda is given as follows:

1. Review mission
2. Review responsibilities
3. Review quarterly goals

4. Review this quarter's progress
5. Discuss timetable to achieve goals and, based on business priorities, determine if they are still the right set of priorities.
6. Review, analyze, and set individual goals for personnel to calculate how next quarter's target will be met
7. Lessons learned
8. Set date for next meeting

These activities cover the main issues that a board should address.

Avoiding the “Rat Holes”

As a small warning — there are a number of discussion “rat holes,” which are all associated with the general, conceptual side of training, that board meetings can fall into. These kinds of discussions can drain away not only a board's productivity, but also its purpose and its executive members. It is important to be able to recognize these rat holes to avoid them — or if you are in one, to stop the slide deeper.

One tip for avoiding discussion rat holes is to emphasize specific training tasks, as they relate to your specific business goals. Remember, the purpose of a certification management board is not to get involved with the detailed aspects of producing training material, but to determine what business issues to direct training efforts at.

“Red flags” indicating a rat hole include:

1. The discussion is focused on training theory, not on specific aspects of your business.
2. The discussion is focused on parsing sentences and deliberating definitions for things like what a well-written task is or what a well-written task objective is or, worse, what knowledge itself is (!).
3. Extended length, lack of resolution.
4. High frustration levels.
5. Inability to stop the discussion.
6. Participants are no longer listening to one another.

A Word About Determining Training Priorities

When first surveying the training landscape, the size of the challenge may look enormous. But, as it is with all management tasks, you can surmount the challenge by breaking it down into manageable pieces. Your first targets should be your top business priorities, the problems that need to be fixed. Clues as to what these are will show up in the various department budgets of your company — things such as high travel costs for engineering and high phone support costs, for example, because service is not trained in the skills required in the field. Other clues include specific problems not getting solved, customer complaints, etc.

Remember, though, not all performance problems can be resolved by training. For example, training cannot help with problems that are really caused by the unavailability of tools and materials, incorrect internal procedures, and a manager who discourages performance. It can, however, help if a deficiency in skill is the issue. Your training goals should be directed *only* at those things that training can affect, and if your problems lie outside the arena of training, you must guide your company to solutions elsewhere.

A Word About Metrics

The following figures show examples of metrics that a certification management board should keep track of and evaluate during its meetings. These include such things as the number of certifications achieved per quarter, the number of certifications lost, and the training cycle time to complete all required certifications.

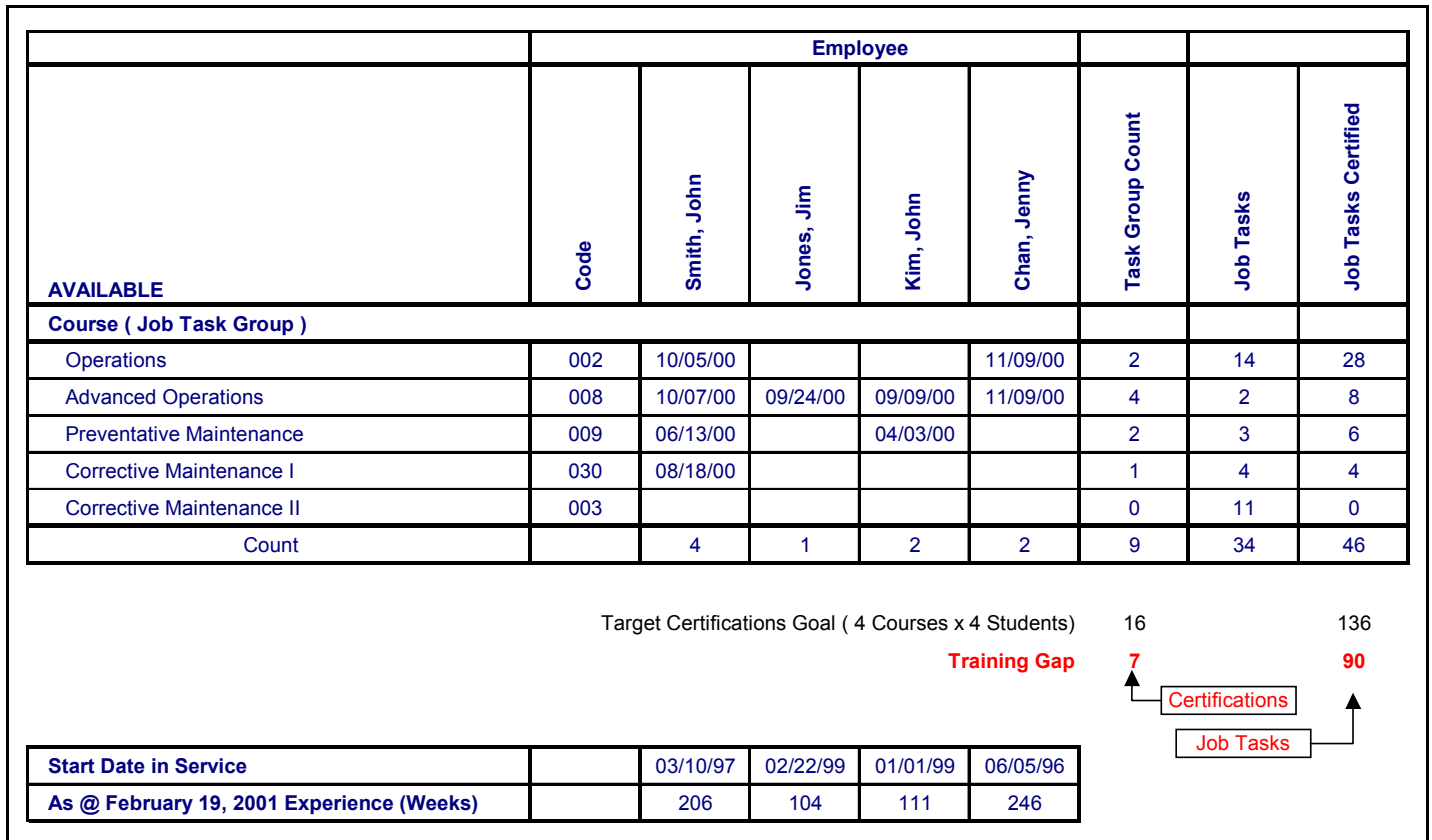


Figure 2: This figure shows an example of a certification tracker, which includes a training gap metric. It shows the date when individuals were certified in a set of Job Tasks (i.e., in a Job Task Group), the number of individuals certified in a Job Task Group (Task Group Count column), the number of tasks in each Job Task Group, and the total number of Job Task certifications achieved (Job Tasks Certified column). It also shows when each person started within the organization to track the experience of each employee in terms of time versus skills acquired, which in turn indicates the training cycle time. Blank cells in the tracker indicate development opportunities. A certification management board would review this data at each meeting to determine progress and new goals.

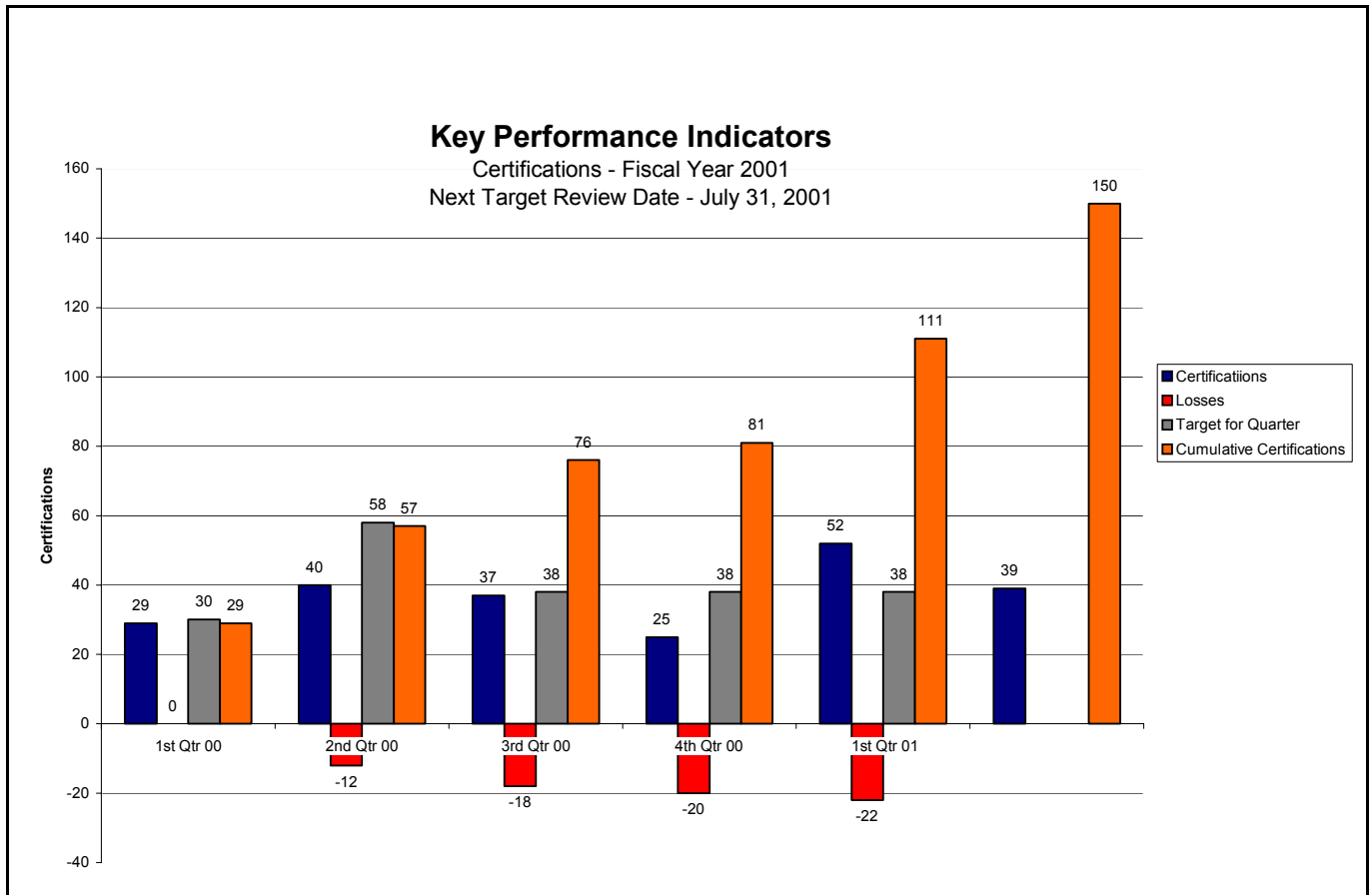


Figure 3: This chart shows the “roll up” of the certifications by quarter. It compares certification targets against new certifications achieved and certifications lost — due to the departure of employees. A certification management board would also review this data each time it meets.

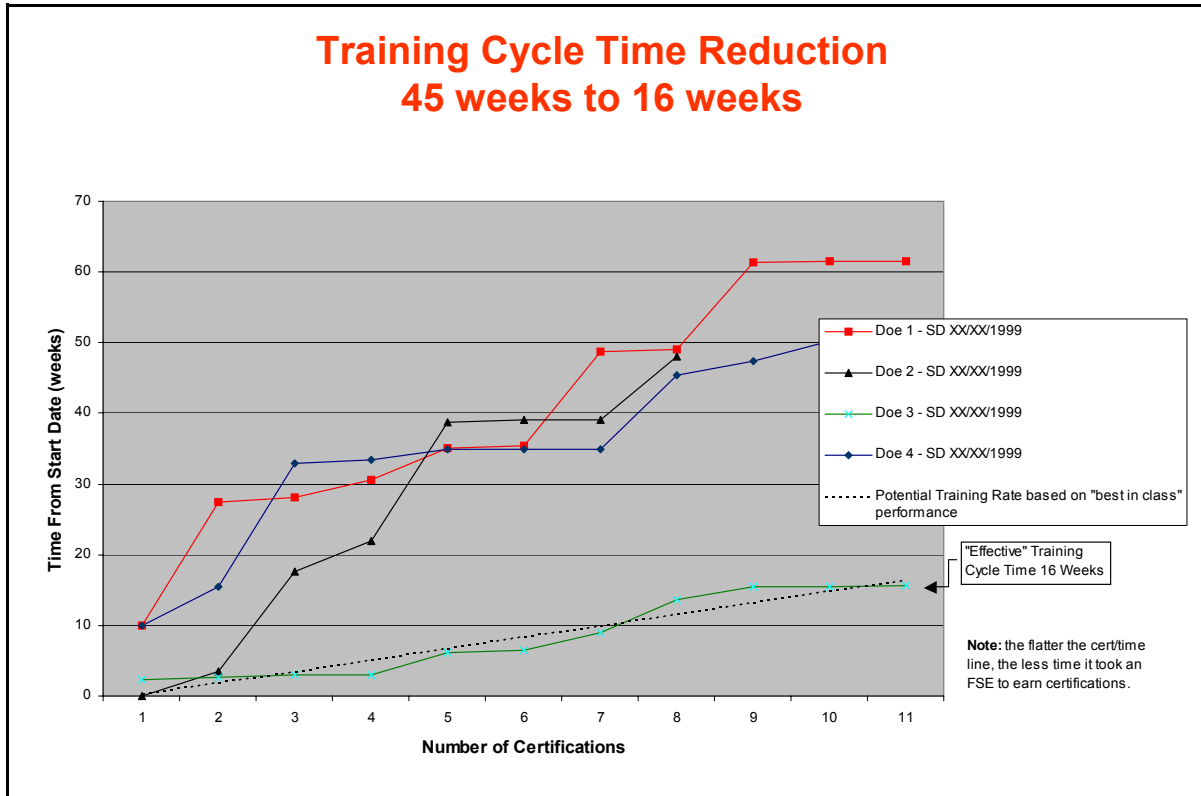


Figure 4: This figure shows a real chart for training cycle times at a client site — which is the time it takes a student from the start date to reach full proficiency. When tracking first started, it took 45 weeks to fully train an individual. Under the guidance of a certification management board, this cycle time was reduced to 16 weeks.

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