

# On-The-Job Training (OJT) Guidance

The purpose of this document is to provide state departments with On-the-Job Training (OJT) guidance, identify recommended employees roles in the OJT process, and how to conduct and document OJT as part of employee training. The OJT documentation can be used to document any type of OJT, including the training required for newly appointed supervisors under Government Code 19995.4(b). CalHR developed the documentation and tools in collaboration with state and non-state subject matter experts (SME).

## What is OJT?

OJT is a time efficient and cost effective method of developing employees by using a department's internal resources, knowledge, and talent. The OJT usually takes place at the job site or in a job-like simulated environment.

## When is OJT Used?

OJT is usually the preferred training methodology when the skills are best learned while being applied on the job or in a "job-like" simulated environment. It can be used to augment instructor led training, fine tune existing skills, or ensure the proper application of existing skills. Unless otherwise prescribed by law, regulation, or bargaining unit agreement, the amount of time spent in an OJT training program can be determined by understanding the trainee's knowledge and skill level and the amount of time a department's resources can commit to the OJT.

## OJT Roles

The OJT process relies on a collaborative approach which can involve multiple partners within the department.

- Trainee - The employee who needs the OJT.
- Department Training Officer – They may be asked to collaborate with others to develop the OJT program.
- SMEs – They provide vital information about the training topics relevant to the job as identified in a job specification's knowledge and abilities section or a duty statement's essential functions section and steps completed in the OJT to support the training topics. They may work in the same program as the employee being trained and perform (or have recently performed) the same essential functions and performance steps. A SME would be a great choice for a trainer if they are willing to train and have the time and training skills.
- The trainee's supervisor - They provide direct supervision over the person being trained, can help develop the OJT topics and steps, and identify the OJT training schedule and time frames.

# Developing OJT

The OJT process can be developed through the ADDIE process: analyze, design, develop, implement, and evaluate.

1. **Analyze** – Identify what needs to be trained. This process can include:
  - a. Defining the OJT purpose and identifying the training goals and desired outcomes.
  - b. Examining the job specifications or duty statements and other appropriate material (i.e. procedure or desk manuals, process documentation, etc.) that are applicable to the trainee.
  - c. Identifying what needs to be trained through defining the training topics and steps necessary to successfully perform each topic.
  - d. Discussing the job specification or duty statement and job processes with a SME, preferably an experienced or lead performer or supervisor, to ensure the OJT program reflects the topics that need to be trained and the steps.
  - e. Observe and document how the SME performs the training topics and steps to see how to do the job correctly.
  
2. **Design** – Identify the trainers who can help design the OJT. The process can include:
  - a. Designing, detailing and articulating the training topics and steps critical to developing the OJT based on the trainee's class specification or duty statements and other applicable material.
  - b. Designing or identifying the job aids needed to support the OJT. Job aids can include check lists that identify all the deliverables that need to be performed, instruction cards, or other tools that a trainee needs to prompt them on how to complete an essential function or performance step.
  - c. Clarify the roles and responsibilities for all people involved in the OJT.
  
3. **Develop** – Develop appropriate OJT documents, resources, training topics and steps. This process can include:
  - a. Creating training materials such as job aids and check lists.
  - b. Writing the steps in the OJT action plan and include the OJT's purpose.
  - c. Developing an OJT work plan with milestones that identify when the trainee will complete the OJT.
  
4. **Implement** – Implement the OJT action plan by scheduling and conducting the OJT.
  - a. Document progress on the OJT action plan and check for knowledge along the way by asking the trainee to demonstrate or apply the knowledge or skill being taught in the OJT. This will ensure the knowledge and skills are being transferred to the trainee and applied appropriately.
  - b. After observing the trainee's overall performance in the OJT, make appropriate adjustments so the OJT focuses on training topics and steps that need more training.
  - c. Meet with supervisor, trainee, and trainer to discuss the trainee's performance.
  
5. **Evaluate** – Review the performance feedback from the trainer, supervisor, and trainee to determine the OJT's success. Analyze the feedback, make adjustments to OJT and related documents, and retrain areas that are needed.

## Documenting OJT

The OJT documentation, or action plan, is part of the trainee's training record and is a method to verify the training was completed. Like a training certificate of completion, the OJT action plan identifies the:

- Trainee name
- Type of training provided
- Training date(s)
- Name of the trainer and/or training organization

But the OJT action plan also identifies the:

- Training method
- Total amount of time training was provided
- Areas or modules trained and the relevant training topics and steps.

The action plan should be developed by the trainer, supervisor, and SME prior to starting the OJT, and include a signature space for the trainee, their supervisor, and the trainer to validate that the OJT has been completed. At the conclusion of the OJT, the action plan must be signed, and a copy must be provided to the trainee and another copy must be placed in the trainee's training file.

The OJT template and samples are designed to help you document the OJT process –

OJT Action Plan:

- [Template with Instructions \(PDF\)](http://www.calhr.ca.gov/Documents/training-ojt-template-instructions.pdf)  
(<http://www.calhr.ca.gov/Documents/training-ojt-template-instructions.pdf>)
- [Template with Instructions - Text Only \(RTF\)](http://www.calhr.ca.gov/Documents/training-ojt-template-instructions.rtf)  
(<http://www.calhr.ca.gov/Documents/training-ojt-template-instructions.rtf>)
- [Sample A \(PDF\)](http://www.calhr.ca.gov/Documents/training-ojt-action-plan-supervisor-sample.pdf)  
(<http://www.calhr.ca.gov/Documents/training-ojt-action-plan-supervisor-sample.pdf>)
- [Sample A - Text Only \(RTF\)](http://www.calhr.ca.gov/Documents/training-ojt-action-plan-supervisor-sample.rtf)  
(<http://www.calhr.ca.gov/Documents/training-ojt-action-plan-supervisor-sample.rtf>)
- [Sample B \(PDF\)](http://www.calhr.ca.gov/Documents/training-ojt-action-plan-ps-sample.pdf)  
(<http://www.calhr.ca.gov/Documents/training-ojt-action-plan-ps-sample.pdf>)
- [Sample B - Text Only \(RTF\)](http://www.calhr.ca.gov/Documents/training-ojt-action-plan-ps-sample.rtf)  
(<http://www.calhr.ca.gov/Documents/training-ojt-action-plan-ps-sample.rtf>)

The OJT process outlined in this document is a cost effective method for ensuring trainees receive the necessary training provided by knowledgeable and skilled SMEs.