

Project Request Scope and Analysis

1. Project Description, Objectives, and Requirements:

Course Name/ID #:	Leadership Competencies Introduction
Instructional Designer:	Melissa King
ID Manager:	[REDACTED]
Project Sponsor:	[REDACTED]
Stakeholders:	[REDACTED]
Subject Matter Experts:	[REDACTED]
Purpose/Background:	<p>The Leadership Competencies Introduction course is an eLearning course offered to leaders (managers, directors, and general managers) within [REDACTED]. During this course, leaders will receive a general overview of the new four new leadership domains, 12 leadership competencies, and leadership reflection/evaluation forms that align with the processes necessary to develop accurate and effective talent development plans.</p> <p>In addition to providing necessary talent development information, this new program will also provide a framework for expectations and a growth plan for leadership throughout [REDACTED]. Leadership gaps will also be identified to help guide future professional development opportunities.</p>
Goals, Scope, and Focus:	<p>Program/Business Goals:</p> <p>The main goals of this new leadership competency program are to:</p> <ul style="list-style-type: none"> • Develop professional development opportunities • Provide a framework for expectations in a leadership position • Create a visible plan for growth within the organization <p>Goals of this Course:</p> <ul style="list-style-type: none"> • This introductory course will be offered as an eLearning to provide an overview/awareness of the new leadership competency program • Existing and new leaders will be required to complete this training • Learners will be able to identify: <ul style="list-style-type: none"> ▪ Domains ▪ Competencies ▪ Leadership rating forms ▪ Alignment process with their leader ▪ How data will be used to create professional development ▪ Succession plans (form) ▪ Improvement plans (form) • Additional training on this program will be developed following this eLearning. Future projects will utilize ILT (classroom and/or virtual) to

	<p>provide guidance with evaluation and alignment processes, as well as the implementation of succession planning, individual development plans. Leadership gaps will also be identified to help guide additional professional development opportunities.</p> <p>The scope of this eLearning will include:</p> <ul style="list-style-type: none"> • Information about the new domains and competencies • An overview of the processes of evaluation and alignment • Introduction to the Leadership Rating Form, Succession Plan Form, and Improvement Plan Form • Maintaining positive attitudes and leader buy-in regarding the implementation of the program will be a focus of design (by providing the “whys” of this implementation)
<p>Targeted Learner Characteristics:</p>	<ul style="list-style-type: none"> • 100% of leadership within the organization need this training to understand the competency model and their expectations for success. • Learners do not have experience with leadership competencies, domains, or their application to their work at [REDACTED] <ul style="list-style-type: none"> ▪ The only current point of reference is the general team member annual evaluation cycle where team members evaluate themselves and then receive feedback from their leader. This entry skill will be utilized as a reference point when introducing the leadership forms and evaluation alignment process. • Learners have a very limited amount of time to participate in this training due to daily responsibilities of their roles. <ul style="list-style-type: none"> ▪ Time and importance will be allotted for participation in this program by upper management. ▪ Accommodations for time constraints will be handled on an individual basis, directly through communication with upper management. • All learners speak English but have a wide variance of education levels. Therefore: <ul style="list-style-type: none"> ▪ Content will be developed in the English language only ▪ Reading and vocabulary levels will maintain high school level abilities ▪ Learner will control course pacing (i.e. advancing screens) ▪ Interactivity will be included where possible, including ▪ Multimedia/video content ▪ Audio narration ▪ Knowledge check questions with immediate feedback ▪ Quiz questions to reinforce and assess key concepts • Learners could potentially have negative reactions regarding a competency model (i.e. fear of negative consequences for lower

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	scores/ratings). Efforts will be made to explain the benefits of this program to help avoid negativity or misunderstanding.
Existing Training and Resources:	None
Target Seat Time:	20-30 minutes
Languages:	English
Project Requirements: <i>[Client must-have components]</i>	An introductory eLearning that provides an overview of the Leadership Competencies program. Content includes: <ul style="list-style-type: none"> • Explanation of the 4 Domains and 12 Competencies (quick overview of each) • Process overview for evaluations, alignment, and selecting Improvement or Succession Plans, including forms (Performance Evaluation, alignment, Improvement Plan, Succession Plan)
Pre-Requisites (if any):	None
Learning Objectives (LO):	By the end of this course, learners will be able to: <ul style="list-style-type: none"> • Define the ██████████ Leadership Competency Model and purpose • Identify the domains and competencies of the model • Complete the performance evaluation form to assess the performance of yourself and your direct reports (*removed due to potential new electronic system for input/data on this process) • Describe the performance evaluation alignment process for leaders and how to use the results
How will we measure learner proficiency with content?	Knowledge Check questions will be included throughout the course to help reinforce critical content, maintain learner interest through interactivity, and provide feedback or correct any misconceptions. Quiz questions will be included at the end of the course to measure learner completion and understanding of key concepts.
Will there be pilot/testing with an identified target audience prior to course launch? (Not Q/A)	No pilot planned at this time.
Project Budget:	Estimated budget includes 176 hours for development

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2. Content Outline

Item/Topic & Learning Objective(s)

- I. **Identify [REDACTED] Competency Model**
 - a. Define competency, domain
 - b. Overview of the 4 domains

- II. **Define the 12 leadership competencies**
 - a. Overview of the 12 competencies
 - b. Define observable behaviors

- III. **Complete the Leadership Rating Form for self and direct reports**
 - a. Leadership rating form
 - b. Define ratings key
 - c. Define comments use
 - d. Practice using Leadership Rating Form (guided and independent practice opportunities)

- IV. **Describe the performance evaluation alignment process for leaders and how to use the results**
 - a. Overview of the alignment process (process outline needed from [REDACTED])
 - b. Explain how to select the Development Plan or Success Plan (determination of this needed from [REDACTED])
 - c. Overview of creation of professional development opportunities (info. needed from [REDACTED])

Potential Quiz and/or Knowledge Check Questions may include:

1. What is a competency?
 - a) **A measurable behavior that enables successful job performance**
 - b) An unachieved potential ability of a team member
 - c) A team member's attitude toward their job or workplace
 - d) A skill required for every team member to keep their job

2. Leadership competencies measure a leader's _____.
 - a) **Observable behaviors**
 - b) Future skills
 - c) Current attitudes
 - d) Medallia ratings

3. What are observable behaviors?
 - a) **Actions that can be seen and measured**
 - b) Thoughts and feelings that are not spoken or expressed
 - c) Emotions, as interpreted by the observer

d) Thoughts, as interpreted by the observer

OR Which of the following are observable behaviors? Select all that apply. (Can convert to drag and drop for a KC question)

- a) Asking a colleague for feedback
- b) Expressing gratitude when another team member helps with a task
- c) Assigning new and challenging work assignments to a direct report
- d) Listening to a direct report regarding the challenges of a project

4. The Leadership Competencies are the knowledge, skills, and behaviors that represent/define _____.

- a) **Effective/successful leadership**
- b) Ineffective team members
- c) Pathways for promotion
- d) Poor job performance

5. Drag and drop each of Leadership Competencies to its matching domain.

Domains:

- Leading Self
- Leading Others
- Leading Business
- Foundational Competencies

Competencies:

- a) Strategic Thinking
- b) Conflict Management
- c) Coaching
- d) Accountability
- e) Guest Service
- f) Problem-Solving
- g) Organization and Planning
- h) Business Acumen
- i) Continual Learning
- j) Leading Change
- k) Effective Communication
- l) Strong Work Environment

6. What is the purpose of Leadership Competency model? Select all that apply.

- a) **To provide a pathway to successful leadership**

	<p>b) To help pinpoint a leader’s strengths and weaknesses</p> <p>c) To aid leaders and their leader align expectations with current job performance</p> <p>d) To promote growth and development within the leadership roles</p> <p>e) To guide the selection of the next generation of leaders</p> <p>7. What is the purpose of the Performance Evaluation Alignment meeting?</p> <p>a) To enable a leader and their leader to align expectations with job performance</p> <p>b) To provide opportunity for the leader to criticize their direct report</p> <p>c) To help the leader and their leader identify strengths and weaknesses</p> <p>d) To provide extra meeting time to discuss business goals</p> <p>e) To enable a leader and their leader to align responses on the Leadership Rating Form and discuss and match job expectations</p> <p>8. How do you know when to select the Succession Plan form over the Performance Improvement form?</p> <p>a) [succession form for a high performer and ready for next step, perf improvement plan for someone not performing well and needs more support and assistance.]</p> <p>b) ?</p> <p>9. What do you do if you can’t find agreement during the alignment meeting regarding the performance evaluation of a leader?</p> <p>a) [asking to find out]</p> <p>b) ?</p> <p>10. As a leader at [REDACTED] how often will you complete a self-evaluation using the Leadership Rating form?</p> <p>a) Annually (once per year)</p> <p>b) Biannually (twice per year)</p> <p>c) Quarterly (four times per year, or every four months)</p> <p>d) Bimonthly (once every two months, or every other month)</p>
<p>Deliverable(s): (eLearning, audio, video, graphics, job aids)</p>	<ul style="list-style-type: none"> • eLearning • Narrated audio • Video introduction by an influential leader/executive/GM ([REDACTED] and [REDACTED] S) • Forms will be included but have already been developed (Leadership, Succession Plan, Development Plan) but the system may change and will not be shown in this introduction

<p>Additional Information:</p>	<p><i>(Notes on activities, assessments, and external resources – when needed. SME requests and comments can be placed here)</i></p>
<p>Possible Constraints:</p>	<ul style="list-style-type: none"> • Availability of time/budget/availability of the leader(s) for recording video content • Video editing timeline • Availability of resources such as B-roll, Creative team scheduling for recording • SME/stakeholder availability to provide review of content and maintaining proposed timeline • Urgent projects may be moved ahead of existing projects in development.
<p>3. Implementation:</p>	
<p>How will proposed solution be implemented?</p>	<ul style="list-style-type: none"> • This eLearning is expected to be delivered on July 3, [REDACTED] • The eLearning will be delivered via an emailed link and housed on [REDACTED] LMS. • Learners will be notified to take this course through [REDACTED] • Team Members will have [REDACTED] days to complete the assigned course. • Each learner will take the course on their computer or mobile device and allocated [REDACTED] minutes to complete this course. • SCORM package will indicate Pass/Incomplete. • Passing grade is 80%. • Completion reports will be provided to [REDACTED] on a [REDACTED] basis. Team member accountability and follow-up will be handled by [REDACTED] • Accountability Considerations: Additional support from directors/upper management will be required to support leaders with time, budget, and resources to participate in training and hold them accountable to completing it. <ul style="list-style-type: none"> ○ Additional accountability will fall to upper management/executives regarding accountability for follow through with the implementation of the processes learned in the training.
<p>Change Management Plan: (if needed)</p>	<p>After implementation, additional support from GMs to build their workforce and highlight the use of leadership competencies will be crucial to the success of the program.</p>
<p>Project Update Strategy:</p>	<p>Updates only when there are changes to the overall program.</p>
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<p>4. Instructional Strategy:</p>	

Presentation/Content Delivery:	Direct Instruction Model – Orientation, presentation, structured/guided/independent practice where possible (forms)
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5. Creative Treatment:

Theme/Look and feel:	Brand theme
Additional elements (ex. gamification features):	Video/audio where possible

6. Development Milestones

Description	Date Sent to SME/Stakeholder	Return to ID/ Due Date
ID Doc (This document)	May 01, [REDACTED]	May 03, [REDACTED]
Storyboard (PDF or PPT Doc via email)	May 16, [REDACTED]	May 18, [REDACTED]
Narration/Video Script (Word Doc via email)	May 22, [REDACTED]	May 24, [REDACTED]
eLearning Review #1 (Link via email)	June 9, [REDACTED]	June 14, [REDACTED]
eLearning Review #2 (Link via email)	June 21, [REDACTED]	June 23, [REDACTED]
Final Course Link to LMS (Link via email)	July 3, [REDACTED]	NA

7. Estimated Release Date:

This eLearning is expected to be delivered on July 1, [REDACTED]

Note: Urgent projects may be moved ahead of existing projects in development.

Team Signatures:

I have thoroughly reviewed this document and to the best of my knowledge it is accurate and complete, based on the information available at this time. I understand that changes may be necessary over the course of the project. Task/progress tracking will be handled within Teamwork.

Acknowledged by: Melissa King	Date:	[REDACTED]
Acknowledged by: [REDACTED]	Date:	[REDACTED]
Acknowledged by: [REDACTED]	Date:	[REDACTED]
Acknowledged by: [REDACTED]	Date:	[REDACTED]