

# Process Worksheet

Supplier(s)

Process Name

Customer(s)

Event Client

Processing Rental Contracts

Event Client

The Great Hall Employees

The Great Hall Employees

Process Owner:  
The Great Hall Manager

Process Lead SME:  
The Great Hall Manager

Process Objective:  
Rental Contract Completion

How Measured

Fully completed contract

How Measured

Event client and Manager signed contract

Process Steps

First Step:

Client requests rental

Last Step:

Deliver signed and dated copy of  
completed contract to client

Customers are:

Suppliers are:

- Internal
- External

- Internal
- External

How Measured

Completed contract signed by client  
and Manager

- Key Process
- Critical Process



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# Baseline Assessment of the Process

Process Name: Processing Rental Contracts

# Process Steps	Estimated Time
1. Client requests rental	0 Hrs 0 min 5 sec
2. Client information sheet is located and printed from the computer	0 Hrs 0 min 20 sec
3. Client completes information sheet and returns to the Manager to check availability	0 Hrs 0 min 3 sec
4. Corresponding contract is located in the computer by the Manager	0 Hrs 0 min 10 sec
5. Manager fills in contract specifics	0 Hrs 5 min 0 sec
6. Manager informs client payment amount to reserve appropriate rental	0 Hrs 0 min 5 sec
7. Reserve payment is accepted and client reads and understands contract and attached Exhibit A	0 Hrs 8 min 0 sec
8. Client initials each page of Exhibit A and signs and dates contract in agreement	0 Hrs 2 min 0 sec
9. Manager reviews contract again with client and Manager signs and dates contract	0 Hrs 0 min 10 sec
10. Deliver signed and dated copy of completed contract to client	0 Hrs 0 min 10 sec
<div style="border: 1px solid black; display: inline-block; padding: 5px 15px; margin: 5px;">Calculate</div>	<b>Total Process Time:</b> 0 Hrs 0 min 0 sec

Key Process    
  Critical Process




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# Process Learning Session Plan

Process Number: GH002

Process Teaching Time: 0 hrs 16 min 3 sec

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Process Name: Processing Rental Contracts

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Process Learning Objective: (Review with Process Activated Learner[PAL])

The Process Activated Learner (PAL) will be able to: Complete a rental contract for The Great Hall and Conference Center

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**Prerequisites:**

Client on site

Computer with City of Germantown network access

IT approved network access

Ability to read English

Available rental space

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**Supplies and Equipment:**

computer with City of Germantown network access

Booking calender

Yearly calender

calculator

copy machine

ink pen

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**Notes to All SMEs Teaching This Session:**

1. Numbered lines indicate steps to be performed by the SME
2. Unnumbered but starred(\*\*) lines indicate steps to be performed by the Process Activated Learner (PAL). Each objective must be met in sequence in order to progress to the next step.
3. In event the Process Activated Learner (PAL) can not satisfactorily complete a step requirement, training will stop at that point. Process Activated Learner (PAL) must exit the session and be referred to a proper prerequisite learning session.

Refer to the following pages for the remainder of this training session

Development Date 8/12/10

Revision Date



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# Process Learning Session Plan

Process Name: Processing Rental Contracts

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1. SME will acknowledge client requesting rental (i.e client states they would like to rent a specific room on a specific date)

\*\* PAL will witness client requesting rental

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2. SME will locate client information sheet and print from the computer (i.e. My Computer, greathall\_public on 'fileserver' (P:), Business Division, CONTRACTS, Customer Information)

\*\* PAL will will locate information sheet and print from computer

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3. SME will accept completed information sheet from client and check availability (i.e. verify date requesting is open)

\*\* PAL will accept completed information sheet from client

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4. SME will locate corresponding contract in the computer (i.e. My Computer, greathall\_public on 'fileserver' (P:), Business Division, CONTRACTS, Contract templates. either Great Hall or Conference Center)

\*\* PAL will locate corresponding contract in the computer

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5. SME will fill in contract specifics (i.e. using the Customer Information, the event date, and the price of the rental)

\*\* PAL will fill in the contract specifics

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# Process Learning Session Plan

Process Name: Processing Rental Contracts

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6. SME will inform client payment amount to reserve appropriate rental (i.e. complete payment worksheet on contract and inform client of amount)

\*\* PAL will inform client payment amount to reserve appropriate rental

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7. SME will collect reserve payment and instructs client to read and understand contract and attached Exhibit A (i.e. ensure client reads specifics and answer any questions regarding specifics)

\*\* PAL will collect reserve payment and instruct client to read and understand contract and attached Exhibit A

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8. SME will instruct client to initial each page of Exhibit A and sign and date contract in agreement (i.e. initials pages plus review that client signs name, prints name, and dates contract on correct lines of contract).

\*\* PAL will instruct client to initial each page of Exhibit A and sign and date contract in agreement

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9. SME will review contract again with client and sign and date contract (i.e. ensure all pages in Exhibit A are initialed, signature belongs to client, printed name is legible and date is correct)

\*\* PAL will review contract again with client and have Manager sign and date contract

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# Process Learning Session Plan

Process Name: Processing Rental Contracts

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10. SME will give signed and dated copy of completed contract to client (i.e. make copy of signed contract in GAC office)

\*\* PAL will give signed and dated copy of completed contract to client

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<p>Session Objective Pal will demonstrate: Processing Rental Contracts</p>
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# Observation Report

Process Name:

PAL Name:

SME Name:

Start Time:

Finish Time:

Actual Time:

Baseline Time: 0 hrs. 0 mins. 0 secs.

Baseline - Actual:

Certification Date:

Score:

#	Process Steps	100% Performance
1	Client requests rental	<input type="radio"/> Yes <input type="radio"/> No
2	Client information sheet is located and printed from the computer	<input type="radio"/> Yes <input type="radio"/> No
3	Client completes information sheet and returns to the Manager to check availability	<input type="radio"/> Yes <input type="radio"/> No
4	Corresponding contract is located in the computer by the Manager	<input type="radio"/> Yes <input type="radio"/> No
5	Manager fills in contract specifics	<input type="radio"/> Yes <input type="radio"/> No
6	Manager informs client payment amount to reserve appropriate rental	<input type="radio"/> Yes <input type="radio"/> No
7	Reserve payment is accepted and client reads and understands contract and attached Exhibit A	<input type="radio"/> Yes <input type="radio"/> No
8	Client initials each page of Exhibit A and signs and dates contract in agreement	<input type="radio"/> Yes <input type="radio"/> No
9	Manager reviews contract again with client and Manager signs and dates contract	<input type="radio"/> Yes <input type="radio"/> No
10	Deliver signed and dated copy of completed contract to client	<input type="radio"/> Yes <input type="radio"/> No



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# Learning Voucher

Process Name:

Start Time:

Finish Time:

Total Time:

SME Name:

SME Department:

SME Signature: \_\_\_\_\_

Date:

Employee #	PAL's Name	PAL's Signature:	SME Comments



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# Subject Matter Expert Certification

SME Candidate:  SME Signature: _____  Group Training Leader:  GTL Signature: _____	<b>Prerequisites</b> Attend SME Workshop  Knows How To Write A Session Plan.
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<ul style="list-style-type: none"> <li>Complete this form during each observation. A score of less than 65 indicates the candidate is not ready for SME Certification and that more training is indicated in the weak areas of this evaluation.</li> <li>Discuss this evaluation with the candidate upon completion of each session.</li> <li>Average the three Total Scores to obtain a Final Score for Certification purposes. Minimum score is 65.</li> </ul>	<b>Scoring</b>  <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">Below Minimum/ Unacceptable</td> <td style="text-align: right;">0-5</td> </tr> <tr> <td>Average/Acceptable</td> <td style="text-align: right;">6</td> </tr> <tr> <td>Good</td> <td style="text-align: right;">7</td> </tr> <tr> <td>Very Good</td> <td style="text-align: right;">8</td> </tr> <tr> <td>Excellent</td> <td style="text-align: right;">9</td> </tr> <tr> <td>Outstanding</td> <td style="text-align: right;">10</td> </tr> </table>	Below Minimum/ Unacceptable	0-5	Average/Acceptable	6	Good	7	Very Good	8	Excellent	9	Outstanding	10
Below Minimum/ Unacceptable	0-5												
Average/Acceptable	6												
Good	7												
Very Good	8												
Excellent	9												
Outstanding	10												

PAL 1 Name Process Name: Date:	<b>Certification</b>  Average Score: <input type="checkbox"/> Approved <input type="checkbox"/> Unapproved Re-certification Date:
PAL 2 Name Process Name: Date:	
PAL 3 Name Process Name: Date:	

Scoring Category – Enter 0-10	PAL 1	PAL 2	PAL 3	Comments
1. Introduction – Prepared PAL for Learning				
2. Session Plan Printed and On-Hand or Displayed on Computer				
3. Delivery Techniques: Followed Session Plan and Used Open-Ended Questions				
4. Used Required Supplies and Equipment - Used Correct Equipment (in good condition)				
5. Gave Appropriate Feedback to PAL				
6. Verbal and Body Language Understood – Used Good Grammar and Speech				
7. Safety Considerations Observed – Informed PAL of Any Potential Hazards				
8. Examples Used to Reinforce Requirements				
9. All Training Objectives Met				
10. Knows Subject Matter Well – Adapts to Different Situations				
<b>Total Score</b>				



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# Subject Matter Expert Certification

SME Candidate:

Date:

Group Training Leader:

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Certification Observation Comments: (1st Observation Score )

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Certification Observation Comments: (2nd Observation Score )

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Certification Observation Comments: (3rd Observation Score )

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## 0-65 Not Certify at this time.

Continue to work with Session Plans to improve teaching skills/knowledge.

## 81-96 Certify Above Average

Needs further development and improvement in the following area(s):

## 66-80 Certifiable:

Needs development and improvement in the following area(s):

## 96-100 Certifiable:

A SME and PATS Team Leader.



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