

OW Detailee Best Practice Sheet

The OW Detailee Best Practice Sheet has been created by the OW Workforce Council's Mobility and Knowledge Management team for the sole purpose of ensuring a smooth, effective, and efficient transition for detailees, "home" office supervisors, and "host" office supervisors. We conducted extensive interviews to acquire data based on the experiences of detailees, "home" office supervisors, and "host" office supervisors. We then took the data and recognized particular themes and trends and separated them into three separate best practice sheets for detailees, "host" office supervisors, and "home" office supervisors. This detailee best practice sheet gives a guide for things an employee should consider when participating in a detail.

If you were to go on a detail...

Finding a Detail

- Do you have specific goals you wish to realize through a detail? Then make sure to place your intention to go on a detail in your IDP
- Before applying, understand the assignment and the culture of the office by
 - Fleshing out the specifics of the detail to ensure it is clear (i.e. Who's paying?, How long?, etc.)
 - Conducting informational interviews with managers and colleagues in other offices to learn about their projects
- Clear with home office supervisor first before approaching the office advertising the detail
 - Be clear about goals and objectives for the detail
 - Explain how the home office will benefit and how you will benefit from the detail

Before you Go

- Before leaving try to close out projects and tie up loose ends.
 - Recruit people to make sure there is a backup person who is knowledgeable about your projects in your home office
 - Be sure to have recommendations for people that could backfill to provide a supervisor the projects
- Create a file for backfiller assuming responsibilities for the project, include:
 - Standard operating procedure (SOP) for all relevant processes
 - Important contacts related to the project
 - Work timeline – An outline of when things should be completed
 - After putting the documents on the shared drive, explain where everything is and how it is named
 - Status sheet – projects done and projects in progress
 - Ask people whether the database and the documents make sense
 - Plan for overlap time
 - Give database training
 - Have backfiller listen in on phone calls related to the project
 - CC the backfiller on relevant emails
 - Allow the backfiller to shadow you
- Schedule meeting with the colleagues in the host office to learn about the project.
- Obtain background materials if possible – documents, reports, background information, read them before starting
- Try to arrange the detail during a minimally disruptive time.
 - If the timing is bad, renegotiate for a time with a low amount of disruption
- Brief the home office manager before leaving
 - Flesh out the specifics (i.e. time frame, extension potential, who will pay) of the detail to ensure clarity
 - Also include the information that was given to a backfiller
 - Provide status sheet

When You are on Detail

- At host office, do an inventory of the things related to the work for your detail assignment

- Be open to answering questions whether by phone or email about home office work left behind
 - Make sure this is cleared between the host and home office supervisors
- Near the end of the detail, visit your home office to ensure everything is in order for a smooth transition back.
- For details lasting 120 days or longer, a PARS plan should be done by your host office supervisor and provided to your home office supervisor
- Do a presentation for host and home offices about detail assignment, include things accomplished, things learned and things that might result from the detail.

OW Home Office Supervisor Best Practice Sheet

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If you had an employee going on detail from your office...

- Encourage they communicate their developmental goals in the IDP.
- Have performance discussion to assess whether a detail for the person is a good option at the time, consider:
 - Timing - Is it during a time that the office can still manage without the potential detailee?
 - If timing is bad, then renegotiate a better time.
 - Contribution – What has the employee accomplished to benefit the office?
 - Readiness – Is this employee prepared to take on a detailee assignment?
 - Job Length - How long have they been at he/she has been at his/her current job?
 - Detail History - When was the last time he/she went on a detail?
- When making the decision on who will backfill, consider
 - Detailee's recommendations
 - How the backfiller's skills will fit into the project
 - Backfiller's knowledge of project
- Make sure the employee creates files for backfiller assuming the responsibilities for the project, including:
 - Standard Operating Procedure (SOP)
 - Important contacts related to the project
 - Work timeline – An outline of when things should be completed
 - An index of all relevant documents, their file name and location (i.e. place on the share drive)
 - Status sheet – projects done and projects in progress
 - Feedback - Ask people related to work whether the information is understood.
 - If there is overlap time require the detailee to:
 - Give database training
 - Have backfiller listen in on phone calls related to the project
 - CC the backfiller on relevant emails
 - Arrange an opportunity for the backfiller to shadow detailee
- When bringing in someone to backfill, recognize or reward the work of the backfiller
- Makes sure there is another person that has sufficient knowledge of the detailee's project is "on-hand" while the person is on detail.

- Make sure you and the host office supervisor clearly understand any expectations the home office has for the detailee during his or her detail
 - If agreed upon, have phone or email the detailee if there are any pressing questions or concerns.
 - If agreed upon, make sure the host office supervisor knows what the project entails and has an estimation explaining the work time it will take to complete.
- For details lasting 120 days or longer, a PARS plan should be provided from the host office supervisor
- Negotiate a transition period upon the employees' arrival back, for him/her to present his/her experiences on detail, accomplishments, and provide a connection for how it relates to the home office.

OW Host Office Supervisor Best Practice Sheet

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If you are welcoming a detailee to your office...

- Make sure the detailee clears with home office supervisor first before approaching you
- Make sure you and the host office supervisor clearly understands expectations the home office has for the detailee during his or her detail.
- Try to negotiate a transition period: if the home office supervisor agrees, prior to start date,
 - Make sure the detailee has been copied on relevant emails
 - Make sure the detailee has participated in relevant meetings
 - Has had informational conversations to understand project, work environment/culture, and/or personality of team members.
- Pre-Arrival, make sure
 - Cube space is requested
 - Materials are in the cube
 - Telephone is activated
 - Computer is working
 - LAN is hooked-up
 - Mentor knows when the detailee is arriving
- Be organized and clear about goals and objectives for the detail
 - Provide a sense of purpose for the assignment
 - Have a vision for how the assignment will work
 - Make sure to explain expectations
 - Define the detailee's role in the team as clearly as possible
- Provide a training/mentor to explain project, be a resource, explain work environment/culture
 - If possible and the assignment is a replacement, have the replaced person give training.
 - If possible and the assignment is team related, have a knowledgeable person from the team give training.
 - When choosing a mentor, consider...
 - Knowledge about project
 - Desire to help
- Arrange regular (i.e. 1 week) check-ins to ensure an understanding of the work.
 - The regularity of the check-ins should be reduced as the detailee has a better grasp of the work.
- For details lasting 120 days or longer, establish a separate PARS Plan that should be done within 30 days of the beginning of the detail and given to the home office supervisor.
- Towards the end of the assignment, arrange a time for detailee to present his/her experiences on detail, accomplishments, and provide a connection for how it relates to the home office.
- Near the end of the detail, advise the detailee to visit home office to ensure everything is in order for a smooth transition.

