

# Job Aid - Filling Out Equivalency and Completion Forms

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## Purpose of the Forms

- The Equivalency Form (Attachment 4 to the Leadership 21 [LD 21] Program Manual) is used to request approval for **previously** completed training or education to be used to fulfill specific program requirements, such as courses in the required training block or some of the professional development activities.
- The Completion Form (Attachment 3) is used to document the completion or fulfillment of a specific Program competency, training requirement, or development activity, **after** enrollment in the Program.

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## Filling out the Equivalency Form

1. The Equivalency Form is used for a **single** specific training or development activity, such as for the course, “Team Building,” or activity, “Serve as acting supervisor.”
2. Write in the name of the course or activity for which you are requesting an equivalency on the 5<sup>th</sup> line of the form.
3. In the next section of the form, write in the name(s) of the courses or activities (and the dates that you completed or performed them) that, you believe, correspond to the LD 21 Program course or activity. You may have several courses or activities that demonstrate that you have fulfilled one specific Program requirement. Note that only formal coursework can be used as an equivalency for courses in the Required Training Block.
4. After you have filled out this section, attach any paperwork that documents your claim for equivalency. This evidence could include course certificates, a signed project sheet, or delegation-of-authority memo. If the equivalency is not an exact match with the required training or development activity, you **must** include the course outline or activity description with the evidence documentation.

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### **Filling out the Equivalency Form (continued)**

5. Submit this completed form and attached documentation to your immediate supervisor to review and approve. Remind your supervisor that this “packet” needs to be forwarded to the next-level supervisor for approval and returned to you for forwarding to Judy DiGregorio in the Training and Development Group (TDG).
6. Forward the packet to TDG for review and filing with your other training and development records.

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### **Filling out the Completion Form**

1. The Completion Form is used to document one or more completed LD 21 Program training or development activity, such as for completing a course, fulfilling a competency, or serving in a rotational position. Remember that this form is used to document training or development that you have completed while enrolled in the Program.
2. Write in the name of the course or activity (and the date that you completed or performed it), for which you are submitting the completion documentation, where indicated on the form.
3. Be sure to write in your phone number in case TDG needs to contact you about your submittal.
4. After you have filled out this form, attach your completion documentation. This evidence could include course certificates, a signed project sheet, or delegation-of-authority memo.
5. Submit this completed form and attached documentation to your immediate supervisor to review and sign on the 2<sup>nd</sup> line of the form. Your supervisor, in turn, forwards the packet to Judy DiGregorio in TDG for review and filing with your other training and development records.