

DHS Employee Training Plan

Published: November 2004

Updated: June 2009

Prepared by DHS Training Plan Steering Committee

Table of Contents

<u>SECTION</u>	<u>PAGE</u>
EXECUTIVE SUMMARY	3
INTRODUCTION.....	6
CURRENT STATE.....	13
FUTURE STATE.....	23
Future State Of Employee Training in DHS.....	24
Principles for DHS Training	26
Roles and Responsibilities	28
Enterprise-Wide Training	31
Learning Teams.....	33
DHS Management Training	35
Evaluation Criteria, Methods and Recommendations	37
Methodologies: E-Learning/Blended Learning	39
Methodologies: Facilities and Equipment	41
Standards for Design and Delivery	43
Learning Management System	45
MILESTONES	46
BUDGET.....	51
RISKS AND DEPENDENCIES.....	54
APPENDIX.....	56
DHS Employee Training Plan Overview.....	57
The Essence of Priority Criteria for Sorting Unmet Enterprise Training Needs.....	61
Resources for Enterprise Wide Training Needs (other than in-house).....	68
DHS Enterprise Training Project Overview—August 2004	73
Enterprise-wide Training Needs	75
Learning Teams.....	76
DHS Management Training	77
DHS Management Mandatory Training Topics Project Overview—July 2004	78
Management Training Implementation Considerations	82
New Managers	83

All Incumbent Managers.....	84
Aspiring-To-Be-Managers	85
Sustainable Delivery System	86
Training Evaluation—Report.....	88
DHS Level 1 Evaluations.....	89
DHS Level 2 Evaluations.....	90
DHS Level 3 Evaluations.....	91
DHS Level 4 Evaluations.....	92
Standards for Training Design and Delivery	93
E-Learning/Blended Learning: Background.....	96
E-Learning/Blended Learning: Research Findings	97
E-Learning/Blended Learning: Glossary	98
DHS Training Methodologies—Decision Guidelines	99
Description Of Training By Division	108
FTE Training Percentages by Division.....	114
Training Plan Updates.....	115

DHS Employee Training Plan
Executive Summary

DHS Employee Training Plan

Executive Summary

- The DHS Employee Training Plan creates a strategy to align DHS employee-training resources with its core programmatic and organizational priorities.
- The plan establishes principles for all employee training in the department.
 - Training is linked to the mission, goals and outcomes of DHS.
 - It is developed in partnership with the customers requesting and receiving the training.
 - There is a shared delivery system consisting of facilities, learning technologies, distance learning and instructional design.
 - Training is evaluated to determine its effect on intended outcomes.
- The plan outlines the training governance structure.
 - It creates a DHS Employee-Training Council to oversee implementation of the plan and develop strategies for addressing enterprise-wide training needs, methods and standards for design, delivery and evaluation.
 - It identifies roles and responsibilities for all training entities in the department.
- The plan identifies enterprise-wide training needs, resources currently available to address the needs and a process to develop additional training resources.
- It identifies training currently provided by each division.
- New training and training methods will be developed through the use of Learning Teams consisting of internal-training customers, subject matter experts and training-design specialists.
- It includes an outline of the DHS management-training program and a project plan for implementing the plan beginning in 2004.
 - Management training will incorporate the recommendations of the Workforce Management Committee and the Diversity Development Coordinating Council (DDCC).
 - Mandatory training for all managers will be completed by the end of 2005.

- It creates criteria for training evaluation, including recommendations for evaluations that may be conducted immediately and for those requiring more extensive research-design efforts.
- It includes guidelines for decision making concerning training methods, as well as a process for developing a coordinated system for developing technology based learning resources, e.g., e-learning and the Learning Management System (LMS).
- It creates a means to assure training equipment and facilities are shared across the enterprise.
- It includes standards for training design and delivery to assure training is both effectively and efficiently presented.
- It includes milestones for implementation of the plan.
- It identifies line-item budgets and FTE assigned training duties.
- It includes a list of potential risks, which could delay implementation of the plan.

DHS Employee Training Plan

Introduction

Department of Human Services

Employee Training Plan

The purpose of the DHS Employee Training Plan is to establish a framework for assuring the department has aligned its employee training resources with its core programmatic and organizational priorities. Provider training is beyond the scope of this effort and, therefore, absent from the priorities and resource considerations in this Training Plan.

The plan identifies training needs, priorities, resources and roles and responsibilities for all groups engaged in employee training within the department. It provides a model for governing the training functions within the department, identifies enterprise-wide training priorities and sets standards for training design, delivery and evaluation.

BACKGROUND

DHS managers and staff have expressed concerns about the effectiveness of existing training courses, lack of access to training, confusion about what training was available, lack of resources to meet unmet needs and a lack of coordination among the department's training resources.

There have also been several uncoordinated initiatives concerning the development of distance learning strategies that had not been addressed from an enterprise-wide perspective.

In response to these concerns, the DHS Cabinet conducted a survey in Spring 2004 and identified the greatest unmet training needs in each division.

The DHS Training Plan Steering Committee was convened to develop an overall training plan for the department. It was charged to use the Cabinet's Training Needs Survey as a basis for making recommendations on training priorities, resources, standards for training methods, design and delivery, methods to increase the coordination of DHS training resources and to evaluate the effectiveness of investments in employee training.

(See Appendix, first page, *DHS Employee Training Plan Overview* for the full description of the DHS Training Plan Steering Committee's charge.)

The Steering Committee developed the Training Plan using a process that included gathering data on existing training resources, identifying gaps in needs and resources and exploring options for enterprise-wide governance and better alignment of DHS training with organizational and programmatic needs.

The Steering Committee process included:

- creating a governance model for DHS training
- developing principles to guide DHS training decisions and investments
- sorting the Cabinet survey into enterprise-wide and cross-division training needs, with enterprise needs ranked into high, medium and low priority
- inventorying division training resources, budgets, program and administrative services training priorities and on-the-job training for employees
- developing implementation plans for DHS management training based on decisions by the Workforce Management Steering Committee
- forming decision guidelines on training methodologies
- examining methods and criteria for evaluating DHS training
- exploring the value of adopting standards for training design and delivery
- reviewing the method used to represent training budgets and expenditures

THE TRAINING-PLAN FORMAT

The Training Plan is divided into several sections.

1. Executive Summary
2. Introduction
3. Current State—a description of the current state of training: the way that training is prioritized, conducted and evaluated in DHS.
4. Future State—recommendations for how employee training in DHS can be governed, prioritized, conducted and evaluated upon adoption of the Training Plan. This includes implementation planning for Management Training and other enterprise-wide training priorities.
5. Budget—a description of the current training budgets.
6. Milestones—key implementation actions, deadlines and responsibilities for recommendations in the Training Plan.
7. Risks and Dependencies—a list of risks that can impede implementation of the Training Plan recommendations, sorted into high, medium and low and with suggestions for mitigating these risks; a list of dependencies among the Training Plan recommendations.

8. Implementation Considerations—considerations from the Steering Committee about gaining support for and ensuring success of the Training Plan recommendations in their respective parts of DHS.
9. Appendix—contains details supporting the Training Plan recommendations and the inventory of current training resources.

TRAINING PLAN RECOMMENDATIONS

The DHS Training Plan Steering Committee recommends adopting the Training Plan in whole. The recommendations in the Training Plan are summarized here. Further discussion of the recommendations is contained in the Future State section of this report. Details supporting the recommendations are located in the Appendix.

DHS Training Governance Model

DHS adopt a training governance model that is based on overlapping responsibilities and a shared delivery system.

- An Employee-Training Council made up of high-level managers with responsibility for prioritizing training needs and allocating resources to meet the highest needs. The Employee-Training Council establishes standards for design, delivery and evaluation and is responsible for implementing these in their division.
- Each division [CAF, SPD, HS and department wide shared services (AS, FPA and DO)] has responsibility for identifying and prioritizing program/administrative function training needs and allocating its own resources to meet the highest needs.
- Each division participates in the identification of enterprise-wide training needs and contributes resources as necessary.
- Each division shares in a system of department-wide resources for the delivery of training. This is called a shared delivery system and includes distance-learning technology (NetLink, video conferencing, video production, web-based training), Learning Management System, instructional-design services for subject matter experts, standards for design, delivery and evaluation.

DHS Training Principles

DHS adopt this set of Training Principles for use by Employee-Training Council and each division in prioritizing and allocating resources for training.

DHS Management Training

DHS is implementing the decisions of the Workforce Management Steering Committee for mandatory management training. To support this effort, DHS:

- assign resources for curriculum design teams of subject matter experts, key customers and staff with training development and evaluation expertise.
- provide on-the-job support for new managers.

Enterprise-Wide Training

DHS adopt the highest enterprise-wide training priorities identified by the Steering Committee and delegate to the Employee-Training Council responsibility for allocating resources to meet these needs, identify new, emerging training and resource needs and for assuring that unmet cross-division program training needs are addressed.

Learning Teams

DHS adopt the concept of Learning Teams: short term task groups of subject matter experts, key customers and staff with training expertise assigned by the Employee-Training Council to design curriculum and delivery strategies.

The following high priorities are recommended for immediate action:

- New Employee Orientation
- Confidentiality
- Customer Service
- Team Building for Team Leaders
- Diversity trainings: Cultural Competency and Managing a Diverse Workforce (as recommended by DDCC)

Training Evaluation Criteria and Methods

DHS adopt the Kirkpatrick Model of training evaluation over the course of two years.

- Provide members for a task group of staff with training and research expertise to determine core evaluation questions and implementation processes.
- Provide, hire or contract for a resource to gather evaluation data from throughout DHS, analyze and report to Cabinet on a periodic basis.

Training Methodologies, Facilities and Equipment

DHS adopt the Training Methodologies Decision-Making Guidelines to provide the basis for decisions on delivery methods.

DHS adopt an expectation for increased use of blended learning strategies that incorporate e-learning methods into training curriculum. This is for the purpose of increasing access to training, increasing local delivery, reducing travel and per

diem expenses and reducing loss of productivity when members of the staff are traveling to/from training.

- Convene an E-Learning Strategy Team to develop department e-learning implementation strategies.
- Increase sophistication of instructional-design skills by providing training to the staff with responsibility for increasing blended learning strategies.
- Co-house the Salem-based training technology resources and the staff with responsibility for e-learning development.
- Develop classroom and computer lab facilities in Salem and regionally.

Standards for Training Design and Delivery

DHS adopt standards for training design and delivery.

- Provide members for an ad-hoc, short-term Learning Team with staff who have training expertise to develop standards.
- Employee-Training Council responsible for assuring implementation of standards.

SUMMARY

The DHS Employee Training Plan contains a set of recommendations for approval by the DHS Cabinet. The Training Plan lays out a governance model for training in DHS. It identifies the highest enterprise-wide training needs and provides recommendations for meeting these needs, increasing the coordination of training resources in DHS and increasing the alignment of training with organizational and programmatic priorities.

The DHS Employee Training Plan was developed by:

Michael Buckley Self-Sufficiency Programs and Training Services Manager,
Children, Adults and Families
Rich Cook Training Services Manager, Children, Adults and Families
Bill Coulombe Manager of Program Operations, Health Services
Tami Dohrman Administrator of Office of Financial Services Manager,
Administrative Services
Kristen Duus Deputy Chief Information Officer
Judy Gerrard Manager, DHS Training & Development
Deanna Hartwig Acting Administrator, Office of Federal Resource and Financial
Eligibility, Seniors and People with Disabilities
Sue Nelson Administrator, Office of Human Resources
Jim Sehon Chair and former DHS Human Resources Manager
Naomi Steenson Administrator, Governor's Advocacy Office
John Swanson Deputy Assistant Director, Finance and Policy Analysis

Learning Leadership Council - Training Plan Reports:

Management Training: Ann Croucher, Jeanette Burket, Judy Gerrard, Priscilla
Cuddy and Jim Sehon
Training Evaluation: Cheryl Furrer, Kush Shrestha, Ann Croucher, Judy
Gerrard, Priscilla Cuddy and Jim Sehon
Methodologies: Lisa Harnisch, Linda Kilgore, Shawn Clark, Jim Sehon,
Judy Clyburn, Jennifer DeJong, Rich Cook
Cabinet Survey of
Training Needs: Judy Clyburn, Kim Kelly, Nancy Talbot, Jim Sehon

DHS Employee Training Plan

Current State

Current State of Training

Employee training in DHS is provided through CAF, SPD, HS and Admin Services. Approximately 66% of the training focuses on program-related knowledge and skills, with the balance focused on management, computer skills and other employee skill development. There is no duplication of training topics from one division to another.

(See Appendix for a listing of training courses by division and training staff resources.)

GOVERNANCE

Governance of training is the responsibility of each division. There is no shared, overall department-wide governance of the DHS training function.

The Learning Leadership Council is a cooperative group of training leads from each division. Since the DHS reorganization in 2000, the group has met on a regular basis, responded to several department-wide training issues, sharing resources and delivery responsibilities. The LLC lacks the authority to assess, prioritize and allocate resources for enterprise-wide training needs. Some members lack this authority within their division.

PROGRAM-RELATED TRAINING

Employee training in DHS is primarily focused on program-specific topics through CAF, SPD and HS. CAF and SPD provide training to their staff and others who perform service delivery functions similar to DHS employees. Training for employees within HS is generally within the institutions, OMAP, OMHAS and OIT.

Most program training needs are identified through the requirements of funding sources. Training needs are also identified through error rate reports, or other needs assessments with input from employees, managers, or advisory groups. There are administrative rules related to training for child welfare staff. Other than the Food Stamp program, there is little cross-division training or needs assessment for program training.

Examples of program training being provided are:

- CAF provides training on child welfare, self-sufficiency programs and vocational rehabilitation.
- SPD provides training on programs for seniors and people with disabilities.

- Health Services provides training on medical assistance programs, abuse investigations and services to residents of the Oregon State Hospital and Eastern Oregon Psychiatric Center.

In the DHS Training Plan Steering Committee, both CAF and SPD representatives expressed an inability to meet all the demands for training within their division. For CAF, a recent reorganization of their training resources and focus on distance learning is meant to provide additional resources for training and additional access through web-based training. For SPD, there is little room to expand the resources available for employee training. SPD's training budget is based on the number of FTE in SPD and does not reflect its responsibility to train AAA employees and other service-delivery partners.

MANAGEMENT TRAINING

There is no formal management-training program in DHS. There are training classes suitable for managers, such as Essentials of HR Management, Being An Ethical Leader, Project Management, Contract Administration, etc. None are mandatory, unless an individual manager has made this requirement for their leadership team.

CAF SDA's have local training budgets and contract for management training based on local needs. Child Welfare, through its PSU partnership, has conducted "Supervising For Excellence" for the last several years, a program that has a high level of attendance by their new managers and is highly valued by CAF leadership.

DAS offers a Management Development Series open to state government employees. It has reduced its tuition fees a great deal in the last year. This series has limited capacity to train large numbers of employees.

ENTERPRISE-WIDE TRAINING: ADMINISTRATIVE FUNCTIONS AND OTHER EMPLOYEE TRAINING

AS provides training for department employees on administrative functions, computer skills, HR and other employee skill areas.

These enterprise-wide training needs are generally identified by AS staff through customer interactions or requests. Computer training needs are also identified by upgrades in computer programs or processes. Some training needs are identified through labor-management groups, such as training on de-escalating conflict situations. Examples of training on administrative functions and other employee training:

- OIS provides training on information systems and basic computer skills.
- HR provides training on Human Resource fundamentals.
- Payroll provides training for managers and for new employees on time keeping and payroll coding.
- Contracts provides training on contract administration.
- DHS Training & Development provides training on skills that improve employee effectiveness in task groups, or workplace communication.

There are work groups, who, in the course of their tasks, are developing recommendations for additional enterprise-wide training:

- Workforce Management Steering Committee has recommended a management training program.
- Diversity Development Coordinating Council has recommended training on diversity and cultural competency topics.

Several task groups are currently working on enterprise-wide training needs. These training needs are usually surfaced by central office task groups and brought to LLC or other leadership for cross-division resourcing. There is no mechanism for regularly prioritizing or resourcing emerging enterprise-wide training needs. Some examples are:

- New Employee Orientation
- ADA/OCR compliance
- Information Security
- Reception-Staff Training

ON-THE-JOB TRAINING

On-the-job training is the purview of individual managers. Managers send staff to external training programs or bring training to their work units based on their assessment of needs.

There is little linkage between formalized training from central office and transfer of that training to the workplace. Some line managers have developed their own workforce development methods, especially for supporting new staff. In CAF, leadworkers, HSS4s and CETs help coach new case managers and eligibility workers. In other divisions, new workers generally receive coaching from more experienced workers.

In CAF, each SDA has a training budget and a local committee or in-house resource that determines needs and develops training to meet local needs:

- Plan and deliver training to support local program corrective actions.

- Purchase training from outside resources on management development, case management skills, diversity topics, etc.
- Manage local SDA training budget.
- There is no aggregate of specific local training needs; these specific needs are unrepresented in the DHS Cabinet Survey of Greatest Training needs.

STAFFING THE TRAINING FUNCTIONS IN DHS

Some divisions have Training Development Specialists, while others have combined training responsibilities with other job duties. Most employee training in DHS is provided by staff with these combined job duties and little training in design and delivery. There are no standards for design and delivery and no methods for ensuring that DHS is maximizing the time employees spend in a training mode.

CAF has made significant changes in the staffing of its training function in the last 10 months: moved training responsibility to policy analysts, increased interest in distance learning, dissolved the training unit at Winema Place and refocused the Technical Training Unit on training-delivery support, such as NetLink. CAF has several internal committees working on program training needs assessment, setting priorities and allocating internal resources.

DHS Training & Development, housed in AS/Office of HR, provides some training or training coordination on an enterprise-wide basis. For example:

- Management/Leadership topics
- Information Security
- On-line training registration system
- NetLink

TRAINING DELIVERY METHODS

DHS training methods have relied on traditional face-to-face instruction with which students and trainers are most comfortable. There is a belief in DHS that instructor-led classroom training is the “best” training delivery method. There is no evaluation of current training delivery methods to know that this is always the case. Current research in the training profession recommends a blended learning method combining distance learning and self-study with classroom.

Classroom: Training is primarily delivered in a classroom setting, with some use of distance learning. Most classroom training is delivered in Salem, some in Portland, other I-5 corridor locations and occasionally in Eastern or Central

Oregon. CAF/FACIS and OIS deliver computer training in field locations throughout Oregon. DHS Training & Development delivers several of its classes in field locations, often in response to requests from managers to bring specific topics to their local areas.

Distance learning: NetLink, where presenter and employees are online together, is the main distance learning method used in DHS. Staff from DHS Training & Development, CAF, SPD, HS and OIS were trained by the vendor in the use of NetLink and are helping to train others.

DHS Training & Development provides NetLink system administration, technical support, training of presenters and studio production for all department customers. In the last several months, CAF has created a NetLink studio at the Cherry Avenue location and is providing studio services for CAF staff.

There is interest in DHS for developing web-based, self-paced training: CAF, OIS, upcoming management training, new employee orientation. Staff in OIS and DHS Training & Development have some limited experience in this methodology.

Video production: DHS Training & Development provides video production services for a small number of requests throughout the year, such as New Employee Orientation; and also loans video equipment to internal customers for taping training sessions for use within a division. CAF plans to provide video production services for CAF training needs. Occasionally, ODOT or other video production services from outside DHS are used.

Video conference: DHS is in the process of evaluating the use of the DAS video conferencing network.

TRAINING EVALUATION

Most training has an evaluation component, usually a “satisfaction” rating by the trainee. Some divisions conduct follow-up evaluations to determine what is working and what needs improvement. Some pre- and post-tests are used. There is very little electronic support for evaluation.

There is no reporting of training evaluations; no assessment of whether or not training is achieving intended outcomes. The evaluations from one event to another, one method to another, are inconsistent and lack an ability to assist in developing benchmarks. Staff members with responsibility for training have little education in testing, research or evaluation methods.

DHS TRAINING WEB PAGE AND ONLINE TRAINING REGISTRATION SYSTEM

DHS uses www.dhs.state.or.us/training as the DHS learning portal: one consistent place for everyone for training information and registration. DHS has an unwritten policy requiring any training-related information and material to be posted to the DHS training web page. DHS Training & Development has content management responsibility; OIS provides the web-master for this web portal.

The Online Training Registration System (OLTRS) is accessed through the web page. Since 2000, DHS has an unwritten policy that training registration will be through this system. However, HS/PSOB, HS/OMAP and OVRS maintain separate training registration mechanisms. Staff, in DHS, with training as part of their job duties may be unaware of the requirement to document training registration and attendance through the OLTRS.

DHS Training & Development provides customer service for DHS staff needing to post training sessions to the system, announce training sessions to DHS Universe and for staff having difficulty in registering for training. OIS maintains the database.

The On-line Training Registration System (OLTRS) is being replaced by a learning management system that will support registration, content-management, on-line collaboration and e-learning.

TRAINING FACILITIES, ROOMS, EQUIPMENT

The DHS Training Center at Winema Place in Salem was closed due to space limitations for field staff. This removed several classrooms, shared equipment and resources from the DHS training community.

Individual rooms are in a myriad of other sites. There is no centralized coordination; scheduling is on a first come first served basis, accomplished by calling one location at a time, thus pitting space for training and meetings against each other.

There are a few computer labs (OIS and CAF offices at Cherry Avenue location; Discovery Room at Winema location) and in several field offices. LCD projectors, laptops and other training equipment are located in many places throughout DHS. There is no centralized coordination or scheduling of these resources. There is no bank of laptops that can be shared among training staff for regional training delivery.

TRAINING BUDGETS

Training is budgeted as a line item in each division and expenses are tracked accordingly. No funds have been budgeted for enterprise-wide training. (Please see the “Budget” section of this report for more information.)

SUMMARY OF THE CURRENT STATE OF TRAINING

Employees and managers have expressed concerns about access to or availability of training in the last year and have questioned the impact training is having on intended outcomes, such as the Food Stamps quality control error rate.

Approximately 66% of the training provided in DHS focuses on program knowledge and skill. Employee training includes training for CAF and SPD partners who provide service delivery in the same manner as DHS employees. There is no duplication of training from one division to another.

There is no overall structure to govern training in the department:

- There is no overall agency training plan addressing enterprise-wide training needs, nor standards for training design, delivery, or evaluation.
- There is no comprehensive training plan for department-wide Shared Services (AS, FPA, DO).
- There is no overall strategy to adopt a learning system that blends classroom training with distance learning methods.
- There is no overall assessment of the investment in training resources and the resulting outcomes.
- Training equipment is dispersed throughout DHS with no central coordination.
- There has been a recent reduction in available classrooms with no offsetting alternative means of delivering training.

The current state of training in DHS validates the need to develop a DHS training governance model that has oversight for enterprise-wide training needs, allocating resources for those needs, develop a shared delivery system or training infrastructure, establish standards for training design, delivery, evaluation and methodology selection and move forward with a management training program.

Director's Office

Finance & Policy Administration

Seniors & People with Disabilities

Administrative Services

Children, Adults and Families

Health Services

FPA staff occasionally provide training on Outcomes Planning

Program Training

- for staff and provider
- on programs, services and case management practices for seniors and people with disabilities,
- including State Operated Community Programs (DD services)

- Training function is spread among several units throughout SPD: SOCP; LTC; and Employment Programs.
- Program training FTE incorporated into policy analysts/writer positions
- Training delivery via classroom or NetCast
- TEA positions located in field and assist with local training

AS Policy & Procedure

- For DHS managers and staff
- DHS admin policies: HR, Payroll, Contracts, Process Improvement, SPOTS

DHS Training & Development :

- Management / leadership development;
- Staff training - non-program;
- Department-wide projects (e.g. Workforce Management; Info Security)
- DHS Distance Learning systems (e.g. NetLink)
- DHS training coordination - Online Training Registration,
- Learning Leadership Council
- Training partnership with DAS
- Facilitation services / team building, only if time permits

OIS Training

- For DHS employees
- Desktop applications (e.g. GroupWise)
- Project Management

- Training function is spread among several units in AS: HR, OIS, Contracts, Payroll
- Training FTE incorporated into Admin staff positions; some TD2 positions; and ISS positions
- Training delivery via classroom and NetCast

Program Training:

- for staff and providers (e.g. foster parents)
- on self-sufficiency programs (e.g. Food Stamps), child welfare services, case management practices, and computer programs

- Training function is spread among several units in CAF: MICHAEL B ; M LOWE; Office of Voc Rehab; and Statewide Processing Center.
- Program training FTE incorporated into policy analyst positions; some full-time Training & Development Spc2
- Training provided by DHS staff, and contracted resources (e.g. PSU)
- Training delivery
 - Self-sufficiency - NetLink, WBT, video conferencing, some classroom in field offices
 - Child welfare - PSU Child Welfare Partnership/classroom and WBT, policy analysts field visits, external sources such as JRP?????
 - VR - classroom and conferences in the field
 - SPC - classroom and OJT process
- CET's, HSS4's positions in the field help with local training
- CAF Field - SDAs setting up local training resources to provide OJT or classroom training, as needed.
- Training Liaisons, 1per SDA, assist with communication between LLC and field

Public health education and technical training: Portland State Office Building Health Services Units provide or contract out for training to providers of public health services (e.g. Counties)

Mental Health and Addiction Services program training: Oregon Mental Health & Addiction Services (OMHAS) provides or contracts for training to providers of mental health and addiction services

DHS Institutional Staff Training: Oregon State Hospital, EasternOregon Training Center, Eastern Oregon Psychiatric Center have staff training units for their facilities

Oregon Medical Assistance Programs and MMIS training: OMAP Education & Training Unit provides training for providers and DHS staff on Oregon Medical Assistance Programs

DHS Training

Learning Leadership Council :

Deanna Hartwig
Nancy Talbot
Delegated to: Dale Marande

Ex-officio: Janine Dulaney

Learning Leadership Council :

Judy Gerrard, DHS T&D, Chair of LLC
OIS delegated to - Linda Kilgore

Clyde Saiki, LLC Sponsor

Learning Leadership Council :

Lisa Harnisch, CW
Judy Clyburn, CW-FACIS
Ann Croucher, SS
Aaron Hughes, VR
Karen House, SPC
Jeanette Burkett, CAF Field
Rich Cook
Michael Buckley
PSU/CW Partnership (ex officio)

Learning Leadership Council:

PSOB - Claudia Bingham (Lead)
PSOB - Kim Kelly
OMHAS - Shawn Clark
OMHAS - Pat Herzberg
OMAP - Sandy Wood, delgated to Michel Miller
OSH - Dave Alligood

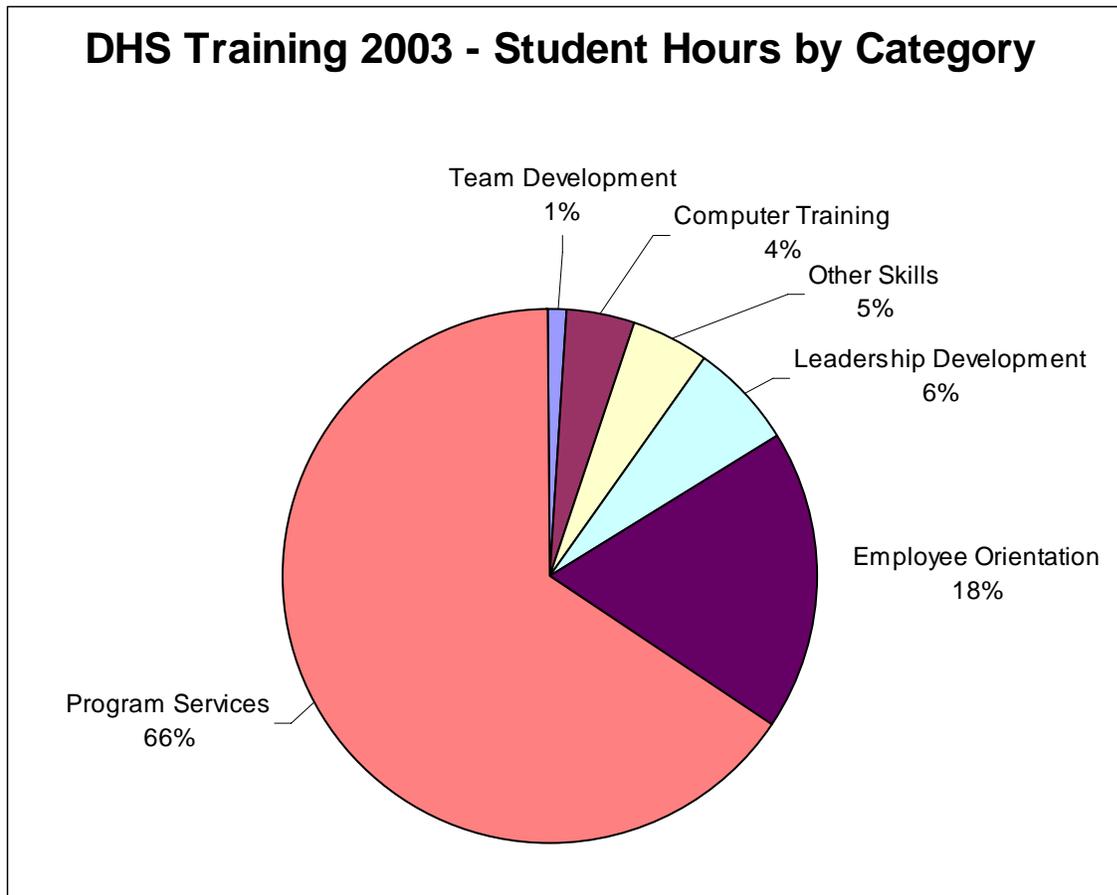
Types of Training by Category

For most training in DHS, attendance is tracked through the Online Training Registration System (OLTRS).

Training is coded as Program Services (includes computer training for program applications and conferences), Computer Training, Team Development, Leadership Development, Employee Orientation and Other Skills.

The majority of training in DHS is program related, which is confirmed by the data in OLTRS. Of the 283,500 hours of training held in 2003:

- 66% Program Services (e.g., Food Stamp,: FACIS)
- 18% Employee Orientation (e.g., HIPAA for New Employees, Payroll)
- 6% Leadership Development (e.g., Cool Tools, Essentials HR)
- 5% Other Skills (e.g., Conflict Resolution, Dealing with Hostile Situations)
- 4% Computer Training (e.g., GroupWise, Desktop Management)
- 1% Team Development



DHS Employee Training Plan

Future State

Future State Of Employee Training in DHS

Adoption and implementation of the Training Plan will assure the alignment of training resources with DHS program needs and administrative priorities. Enterprise-wide training needs will be identified on an on-going basis and resources allocated to those with the highest priority. Divisions will continue to have responsibility to identify and address program-specific training needs and will retain their training budgets.

DHS will have a shared training delivery system that includes a learning management system, distance-learning resources, other delivery methodologies, standards for design and delivery, evaluation methods and assistance for internal customers seeking consultation on training issues.

The following documents describe the future state of employee training in DHS.

- There is a statement of Principles for DHS Training that conveys the value of quality training within resource parameters and values the contribution of training to workforce development and program performance outcomes.
- An Employee-Training Council is established with membership from:
 - Cabinet Sponsor/Champion
 - HR Manager
 - Chief Learning Officer
 - Learning Leads from the divisions
 - Key Customers

The governing body will prioritize and allocate resources for enterprise needs, convene Learning Teams to implement design, delivery and projects around the delivery system, refer to divisions those training needs that are “cross-division,” and roll up reports on effectiveness of training for DHS. This group communicates with internal customers in order to identify emerging training issues.

- Delegating work to Learning Teams, populated with cross-division members and key customers, is the method used by the governing body to share responsibility for meeting enterprise training needs and working together on other projects.

- DHS Management Training lays out the key actions and timelines for developing a management-training program in DHS and builds upon the decisions of the Workforce Management Steering Committee, and the Diversity Development Coordinating Council.
- The department will adopt industry standards for Training Evaluation Criteria and Methods to increase the effectiveness of training throughout DHS.
- Research has shown that e-learning has many advantages and organizations are cautioned to develop a cohesive strategy for implementation. Training Methodologies identifies the immediate actions that are needed to bring e-learning resources into the mix of delivery options.
- Classroom delivery continues to be an effective delivery method for the department—and at the same time, DHS values a move to blending online, classroom and self-study. DHS trainers will choose viable training delivery methods that support learning and achieving outcomes. DHS Training Methodologies: Decision-Making Guide (see Appendix) defines decision criteria and identifies strengths and challenges for most common delivery methods.
 - To make classroom delivery more cost effective, individual rooms will be identified in regional areas with training use a priority.
 - Co-locating major training resources and equipment in the Central Office area (Salem) increases efficiencies by simplifying access, sharing resources and workload.
- The DHS Employee-Training Council will set Standards for Training Design and Delivery. These guidelines will use industry standards and provide a foundation for leveraging the most out of the time spent in training.
- By October 2004, DHS expects to have a new Learning Management System (LMS) that contains features enhancing registration, online collaboration, individual development plans and competency-based training. The Employee-Training Council will assign resources to plan and implement the LMS.

Principles for DHS Training

Building capacity. Meeting strategic needs. Preparing for the future.

VISION

Training supports the DHS mission by providing the organization with strategies necessary to accomplish the orientation, training and development of a competent, motivated and diverse workforce, while making the best use of available resources.

The purpose of training is to increase effectiveness of individuals and teams, throughout their employment, so they can contribute to accomplishing DHS goals. Training provides opportunities for employees to gain or enhance knowledge and skill sets to do their jobs. Employees and managers mutually identify and plan for individual training needs.

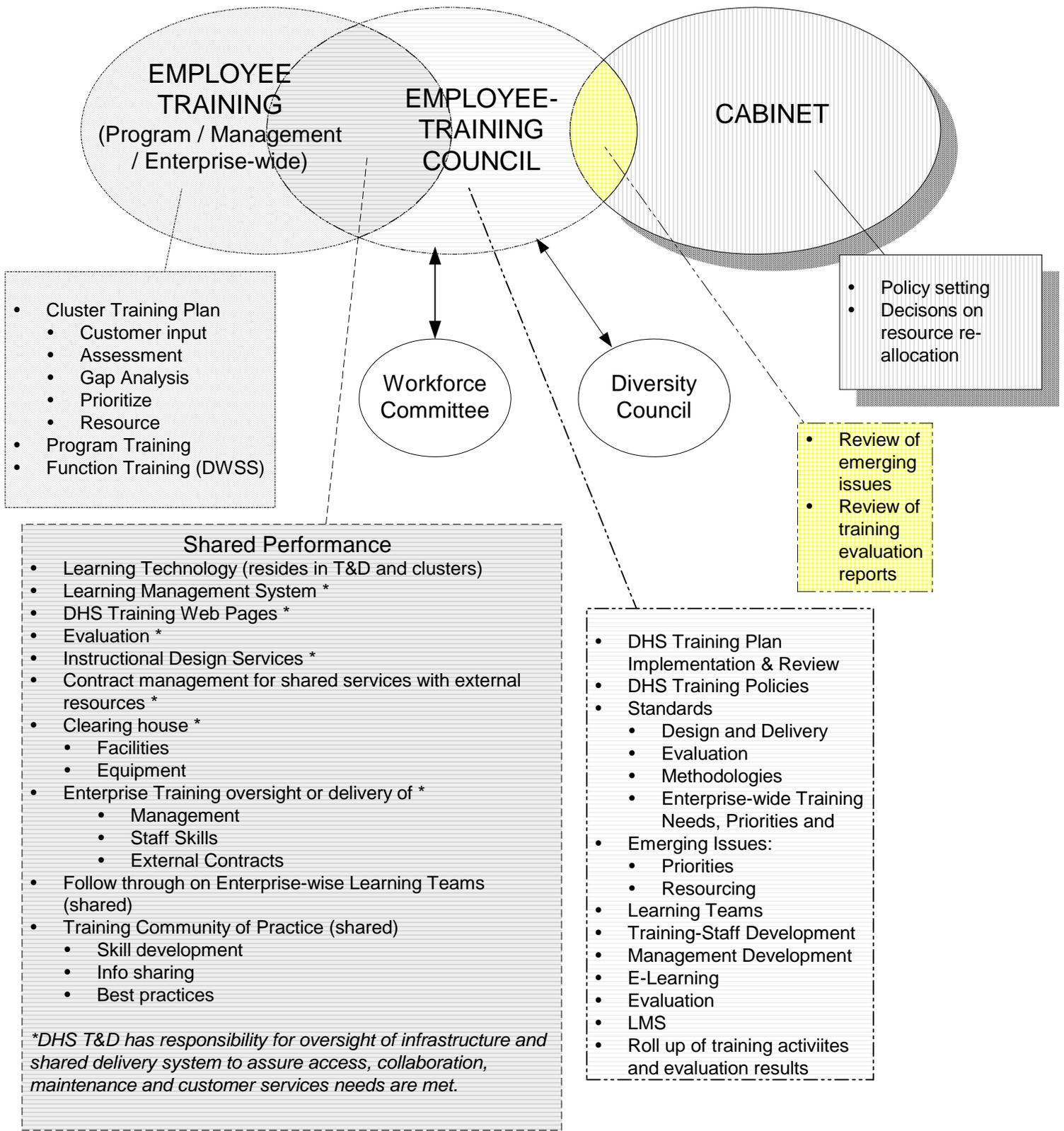
Collaboration and partnerships in the DHS training community leverage resources to provide learning opportunities in cost effective ways. Innovations in learning strategies and technology are encouraged so that effective training can be provided in response to organizational needs and parameters.

PRINCIPLES

The following principles form a foundation for DHS Training:

1. Continuous learning is integral to building and maintaining a quality workforce in order to achieve organizational goals.
2. Training is linked to DHS mission, goals and outcomes. There is a clear expression of the purpose of the training for the learner and the intended outcome for the organization.
3. Training is developed in partnership with customers to assure relevance of content to core competencies and performance expectations for participants.
4. Training is based on a mutual obligation where:
 - staff are expected to share and apply learning, and
 - leadership practice and philosophy supports a learning culture.
5. The DHS training community has a shared delivery system. This includes components such as facilities, learning technologies, distance learning and instructional design services.
6. Those providing training use DHS standards for design, delivery and methodologies to maximize learning while remaining cost effective.
7. Training is evaluated using DHS standards for criteria and methods for the purpose of assessing the impact of training on intended outcomes.
8. An assessment of performance or program data is used to determine when training is appropriate.

DHS Employee Training Oversight System



This model supports the creation of enterprise-wide training resources and standards, while retaining responsibility for program training in the clusters.

09/23/04

DHS Training Governance Model

Roles and Responsibilities

The governance structure provides an opportunity for DHS to implement the training plan, assuring that training is developed in partnership with its customers. This model supports the creation of enterprise-wide training resources and standards, while retaining responsibility for program training in the divisions. The governance body, called the Employee-Training Council, is composed of representatives from the Cabinet, divisions and the customer base. It is empowered to identify priorities for training, assure standards are in place and to recommend allocation of resources to meet training needs.

EMPLOYEE-TRAINING COUNCIL

The role of the council is to ensure the best use of DHS resources in responding to enterprise wide training needs for managers and employees.

Responsibilities include:

- Recommend and create strategies to implement enterprise wide training priorities.
- Allocate resources for enterprise training needs.
- Make recommendations to DHS Cabinet for additional resources as needed.
- Report to DHS Director's Office on results of training evaluation.
- Oversee implementation of DHS Training Plan.
- Develop DHS training policies for use of standards, shared resources and enterprise wide learning management.
- Provide for the development of training staff on design, delivery and blended learning strategies.
- Develop shared training delivery system.
- Collectively exercise stewardship and coordinate training resources across DHS.
- Develop communication strategies relating to training initiatives.

Goals

- Establish and implement standards for training design and delivery.
- Develop and implement DHS training evaluation criteria and methods.
- Develop shared training infrastructure.
- Implement Management Training Program.
- Develop and deliver enterprise-wide training.

Membership Criteria

- Understand and articulate the employee training needs from their division.
- Thinks both from a department perspective, as well as division.
- Has authority to commit resources.
- Has ability to effectively recommend decisions to DHS Director, Deputy Director and Assistant Directors for DHS.
- Has an interest in training or workforce development.

DIVISION TRAINING

Divisions are responsible to provide the training their staff members need to do their jobs. This is “program training” in CAF, SPD and HS. AS, FPA and DO are bundled together under the title Department Wide Shared Services (DWSS)—training for employees that relates to functional areas. DWSS also has responsibility to determine training needs for internal customers on DHS business service policies and practices.

Each division is responsible for a training plan that includes internal customer input, assessment of employee needs, gap analysis, priorities and resource strategy for division specific training. Divisions will work together on program training needs that cross organization boundaries.

Divisions support enterprise-wide training and the training delivery system by sharing in allocating resources for the design/delivery or contract for training and in the mutual planning and implementation of infrastructure.

DHS TRAINING & DEVELOPMENT (HOUSED IN ADMINISTRATIVE SERVICES/OFFICE OF HR)

- Responsible for design, delivery or contract administration for enterprise-wide training as determined by the *Employee-Training Council*, including:
 - Design and/or delivery of training classes
 - Project responsibility for management development
 - Lead or participation in Learning Teams
- Responsible for coordinating shared delivery system/infrastructure
 - Learning Management System—system administration, customer service
 - Training Evaluation—gather data, analyze and develop reports for the Employee-Training Council on training effectiveness, train others on DHS training-evaluation processes

- Distance learning
 - NetLink system administration, training presenters, tech support
 - Video production
 - Development of web-based training
- DHS Training Web page—content management
- Instructional design—providing services to others throughout DHS
- Clearinghouse for facilities and equipment information
- Clearinghouse for training questions, requests and information
- Responsible for providing training-design resources for Office of HR
- Responsible for responding to individual training requests from managers seeking training or other support for their work units, within available resources and schedules.

Manager, DHS Training & Development (Admin Services/Office of HR)

- Responsible for oversight of infrastructure and shared delivery system to assure access, collaboration, maintenance and customer service needs are met.
- Unless otherwise assigned, is the connection between DHS Learning Teams and the Employee-Training Council for support needed without slowing down the process awaiting Employee-Training Council meeting.

Learning Leadership Subcommittee

- Lead and participate on Learning Teams
- Educate and develop the DHS “training community,” which is that network of staff who design and deliver training or presentations
- Implement standards within their divisions
- Identify and share best practices for evaluation, design and delivery

DHS Committees: Workforce Management Steering Committee, and Diversity Development Coordinating Council

Responsible for identifying enterprise training needs for Management/Leadership and Diversity Development. The Employee-Training Council is responsible for collaborating with these groups to develop a resource strategy to meet these needs.

DHS Managers

Responsible for identifying individual staff member or work unit training needs and plan for meeting those needs through program training, DHS enterprise-wide training, DAS or other external training resources.

Enterprise-Wide Training

In April 2004, the DHS Cabinet identified greatest enterprise-wide and division-specific training needs. The Committee then prioritized the enterprise-wide needs into high, medium and low priorities. (See Appendix for the DHS Cabinet Survey of Greatest Training Needs—Enterprise Wide.)

The DHS Training Plan Steering Committee addressed the management training needs in a separate document. (See DHS Management Training in Future State section of this report).

Considering the extensive list of training needs and resource limitations, the DHS Training Plan Steering Committee recommends that the Employee-Training Council:

- 1) Take immediate action on the following high priority training topics, which include topics that are under development with existing work groups and include newly identified training needs:
 - New Employee Orientation (existing group)
 - Confidentiality (existing group)
 - Diversity—Cultural Competency (existing group)
 - Diversity—Managing a Diverse Workforce (existing group)
 - Reception Staff—Customer Service Workshops (existing group)
 - Customer Service (new)
 - Team Building for Team Leaders (new)
- 2) For these immediate needs:
 - a) Support existing groups who are developing high priority enterprise training initiatives:
 - Establish oversight with the leads of existing groups
 - Assure DHS training standards and guidelines are in use
 - Determine training resource strategy as needed
 - b) Take action to form Learning Teams for new high priority enterprise training needs and set parameters around objectives, outcomes desired and resource strategy.
- 3) To support existing classes that are high priority enterprise-wide training needs:
 - a) Identify and oversee implementation of marketing or communication strategies needed to make more effective use of existing training.

- b) Revisit and make decisions on use of internal or external resources or mix thereof.
- 4) Make recommendations to the Cabinet when the resources required for high priority enterprise-wide training needs exceed existing limits.
- 5) In the future, every one to two years, the Employee-Training Council is responsible to initiate DHS training needs assessment, priority setting and resource allocation.
- 6) Between these periodic assessments, the Employee-Training Council is responsible to identify and share resources (in-house, external), identify communication strategies and convene Learning Teams to carry out the development of the training for emerging enterprise-wide training needs that are brought to their attention by Employee-Training Council members, task groups, division or other means.
- 7) DHS Training Plan Steering Committee identified several cross-division program related training topics that came forward with the DHS Cabinet Survey. These training needs are passed to the Employee-Training Council to assure follow through by divisions in addressing these needs.

(See Appendix for DHS Cabinet Survey of Greatest Training Needs—Cross-Division)

Learning Teams

The DHS Cabinet Survey of Greatest Training Needs and the recommended DHS training governance model bring together information on enterprise-wide training needs, training initiatives and shared training delivery system issues.

Cross-division task groups have traditionally been the means to address enterprise-wide training issues. There is no single office or work unit within DHS that has responsibility and resources for this work. There has been no formal mechanism for committing resources for these efforts. Work groups have been formed based on assignment from Cabinet (e.g., HIPAA), or by cooperative agreement from LLC members (e.g., Reception Staff Customer Service).

As a result, there are varying levels of commitment to cross-division training initiatives resulting in lack of coordination, haphazard communication within divisions for these training needs and confusion about responsibility, importance and access to training.

The DHS Training Plan Steering Committee recommends using “Learning Teams,” to develop high priority enterprise-wide training and training initiatives needed to implement the DHS Training Plan. The Employee-Training Council has responsibility to initiate Learning Teams and validate those already underway.

The Learning Team concept:

- Development of DHS enterprise-wide training and shared delivery system projects will be carried out by Learning Teams.
 - These teams will make significant contributions to implementing training in DHS. The assignment to serve represents a firm commitment from DHS leadership for time, funds and staff, and acknowledges the high priority given to Learning Team products and process.
- Learning Teams are:
 - Convened by DHS Employee-Training Council, Director’s Office or by collaboration among division learning leads (i.e., no bottle neck).
 - Ad-hoc, short-term, focused task groups with cross-division membership.
 - Focused on training needs, shared delivery system projects, or emerging issues.
 - Using DHS project planning methods.

- Making recommendations to the Employee-Training Council, who in turn allocates or gains approval for resources for enterprise needs or projects.
- To determine the best use of resources to meet enterprise-wide training needs. Learning Teams (representatives of internal training customers, subject matter experts and a person with training design skills) identify learning objectives, intended outcomes, delivery methods, design, resource requirements and evaluation components.
- For the shared DHS training delivery system, Learning Teams are convened to gain collaboration among internal partners to develop or implement training standards, policies, guidelines, hardware or software recommendations and to develop infrastructure.

DHS LEARNING TEAMS

There are several Learning Teams that the Employee-Training Council will immediately validate or convene:

- Management Development
- Enterprise-wide Training (non-management topics), listed in order of new topics and others already underway prior to the development of the DHS Training Plan:
 - Customer Service
 - Team Building for Team Leaders
 - New Employee Orientation (underway)
 - Diversity Training, identified by the DDCC: Cultural Competency; Managing a Diverse Workforce (underway)
 - Confidentiality (underway)
 - ADA/OCR Policy and Procedures (underway)
 - Reception Staff—Customer Service Workshops (underway)
- Training Evaluation Criteria and Methods
- Standards for Training Design and Delivery
- DHS E-Learning Strategy
- Learning Management System Implementation

DHS Management Training

Simultaneous to the development of the DHS Training Plan, the Workforce Management Steering Committee (WFMSC) made recommendations about a program for training DHS managers and completed a list of mandatory training topics. This list encompassed managers' training needs that were identified through the DHS Cabinet Survey of Greatest Training Needs and by the Diversity Development Coordinating Council.

The WFMSC set forth parameters that included development of training courses for new managers by January 2005, and incumbent managers completing their required training by December 31, 2005.

Because the WFMSC work was happening simultaneously, the DHS Training Plan Steering Committee focused on what kind of support must wrap around a DHS Management Training Program, regardless of topics selected, in order for managers to have a successful development experience. A task group of LLC members provided the DHS Training Plan Steering Committee with recommendations for design and delivery of management training.

After consultation with the WFMSC, the following overarching roles and responsibilities were established:

- The DHS Training Plan incorporates recommendations for how to accomplish the development of mandatory training for managers.
- DHS Training & Development is responsible for hiring a Project Manager to lead the various Learning Teams, provide project management, contract administration, as necessary to develop Management Development curriculum.
- WFMSC will assign resources for Learning Teams and other ad-hoc work that is needed to accomplish training design, delivery, communication.
- DHS Deputy Director and the WFMSC will provide iterative feedback on design, development and resource allocation.
- DHS Training & Development Manager will keep the Employee-Training Council informed.
- After the initial launch of DHS Management Training Program, the WFMSC will hand off responsibility for future management training needs assessment, priority setting and resourcing to the DHS Employee-Training Council.

The following represents the Management Training recommendations from the DHS Training Plan Steering Committee:

1. Use Workforce Management Steering Committee (WFMSC) decisions for:
 - Training content/topic areas
 - An over-arching value for DHS management development.
2. Incorporate and convey expectations for managers in management training.
3. Articulate a DHS management philosophy from which DHS management training expectations flow.
4. Use the design and delivery recommendations in the Learning Leadership Council Report on DHS Management Training. (See Appendix: Management Training, New Managers, All Incumbents, Aspiring-to-be Managers, Sustainable Delivery.)
5. Create a small core advisory team to work with key customers and subject matter experts in development of mandatory training to assure training needs are being met.
6. Apply project management discipline to assure training development/delivery is accomplished for all managers by December 2005. (See Appendix: DHS Management Training Project Overview.)
7. Allow for prior skill building or recent training to “count” in relation to mandatory topics.

DHS Training Evaluation Criteria, Methods and Recommendations

The DHS Training Plan Steering Committee recommends that DHS adopt standards for training evaluation that will be used by all divisions for all training. There is currently no way to evaluate the effectiveness of training, its impact on business results, its carryover to the workplace, effectiveness of different delivery methods.

Evaluation provides trainers with information to improve training materials, presentation and activities. Pre- and post-tests provide information on the learning that occurred and further highlight areas for instructional design and/or one-on-one coaching for participants. Post-training follow up validates which learnings are being transferred to the work place, or why not and other actions that may be needed.

With evaluation data, DHS gains greater insight into precisely where training creates value and when other interventions, such as job aids, might be more cost effective. As stewards of public resources, it is imperative that DHS be in a position to better describe the return on investment that training brings.

The DHS Training Plan Steering Committee recommends that the Employee-Training Council be responsible for establishing evaluation criteria and methods, and for allocating resources to data gathering, analysis and reporting, as follows:

1. Use the industry standard for training evaluation: the Kirkpatrick Model.
 - Level 1—Reaction
 - Level 2—Learning
 - Level 3—Application; Transfer
 - Level 4—Impact; Effectiveness
2. Assign resources with responsibility to:
 - Develop quarterly DHS Training Evaluation Report for Cabinet.
 - Develop evaluation skills of DHS staff with training responsibilities.
3. Use training design standards common to the industry:
 - Training objectives are linked to business needs, results or outcomes:
 - Evaluation process and data sources are planned from start.

- Involve managers (customers) in training design to assure alignment with performance needs being addressed through the training.
4. Adopt the actions recommended in the LLC task group report on Evaluation (See in Appendix):
 - Convene small group with limited time frame to develop core questions for Level 1 and Level 3 evaluations.
 - Develop electronic support and database for evaluations (LMS, Survey Monkey; Excel; Access, etc.)
 - Provide “testing training” for those putting pre- post-tests together
 - Divisions identify which trainings to apply Level 2-3-4 evaluation.
 - Assign research or evaluation resources to assist L4 process — in-house evaluation groups; contract out; work with university.
 5. Develop use of Kirkpatrick Model over the next two years.
 6. Continue to count outputs in DHS training—number of classes, participants, hours of training, etc.

DHS Training

Methodologies: E-Learning/Blended Learning

Technology provides opportunities to fundamentally change how we conduct employee training in DHS. The technology for e-learning is within reach and more affordable than in the past.

DHS is implementing e-learning methodologies for the purposes of:

- *Increasing access to training resources*
- *Increasing consistency of training materials for program delivery*
- *Increasing access to quality training materials*
- *Reducing travel and per diem expenses associated with training*
- *Reducing loss of productivity due to travel*

Training has long relied on classroom, face-to-face instruction. Staff and trainers are comfortable with this method. There is a belief in DHS that classroom is the most effective training method. However, a review of best practices in the training profession recommend blended learning strategies that employ e-learning, self-study and classroom. The objective is to reduce seat time in classroom and preserve classroom time for the most meaningful face-to-face activities.

There are several e-learning initiatives underway that will bring systemic changes to the training delivery system and DHS as an organization. Lacking a coordinated approach to implementing e-learning can unintentionally have negative impacts on all training groups. When one division expresses the intent to do more with distance learning, the training customers come to expect that of all training.

The e-learning materials distributed by one division creates an expectation in participants that “this is what e-learning is like,” they come to expect something similar regardless of who the author is. When employees are expected to participate in e-learning, there are specific things a manager can do to provide the privacy needed. There needs to be a consistent set of expectations for managers about how to support employees in receiving training at their computer. Bringing e-learning into DHS, also raises policy questions on access to training materials, 24/7, from computers off site, etc. While these policies may differ from one division to another, jointly preparing for processes and permissions will benefit staff and managers alike.

The DHS Training Plan Steering Committee recommends:
(See in Appendix a review of research on e-learning that leads to the following recommendations.)

- DHS Cabinet set expectations for increasing the use of blended learning strategies that combine online and classroom instruction.
- Employee-Training Council is responsible for implementing use of the **DHS Training Methodologies Decision Guidelines** (see in Appendix) that considers the training need, outcomes expected, logistics and cost effectiveness. The purpose of using the guide is to be more strategic, across the department, in decisions about training delivery.
- Employee-Training Council convene an E-learning Strategy Group to:
 - Prioritize the development of e-learning initiatives.
 - Develop a shared infrastructure for implementation of e-learning.
 - Provide a single point of access to learning technologies and DHS staff with expertise in e-learning development.
 - Cross train and co-house full-time training staff (AS/TD, AS/OIS, CAF) responsible for e-learning services to maximize the investment in technology while leveraging the complement of skills required for e-learning design and delivery.
 - Increase the sophistication of instructional design by providing training on e-learning design and delivery to those staff with direct responsibility for e-learning development.

DHS Training

Methodologies: Facilities and Equipment

To increase efficiencies in use of training resources, scheduling rooms and availability of shared equipment, the following information sets some context for the Facilities and Equipment recommendations by the DHS Training Plan Steering Committee:

- When determining delivery options, the DHS Training Methodologies Decision-Making Guide (See Appendix), will be used so that the most viable option is selected and balances available resources, training need, customer parameters (e.g., short) and timelines.
- The DHS Cabinet will set expectations for using blended delivery methods. Classroom training continues to be an important option. DHS will increase instructional design expertise so to shift from classroom those learning objectives that can be accomplished in other ways and thereby maximize the learning experience in a classroom setting.
- Individual rooms will be identified in regional areas with training use a priority, in order to make classroom delivery more cost effective by reducing per diem and time way from office.
- Computer labs, laptops, light boxes, overhead projectors, video conference equipment, video cameras and sound equipment are dispersed throughout the DHS training community, but available for use by all.
- Rooms and equipment are part of the shared delivery system, and providing easy access to location information and scheduling is vital to improved efficiency in preparing for training. The new Learning Management System provides a method to schedule rooms and equipment.

The DHS Training Plan Steering Committee recommends that the Employee-Training Council:

- Convene a small task group, with a short time frame to:
 - Update the inventory of training rooms and equipment available for DHS use in Salem and throughout Oregon and input to new LMS.
 - Make recommendations to the Employee-Training Council on policies for shared use.

- Convene a Facilities task group to
 - Co-locate Salem based training resources including classrooms, computer labs, studios, assistance with distance learning and instructional design, and full time FTE attached to these services.
 - Identify and make available regional classrooms.

DHS Training Standards for Design and Delivery

The majority of the training in DHS is provided by staff who have training responsibility combined with other duties. The minimum qualifications for most of these positions do not require any expertise in training design or delivery. There is no certification process for staff trainers in DHS and no program for professional development in adult learning and instructional design. There is also no evaluation to gauge the level of effectiveness for full or part-time trainers.

The intent of having standards for design and delivery is to maximize the learning experience and value of time employees spend in training. Training outcomes will be more effective with standards that apply department wide to classroom, distance, video and self-instruction efforts. Everyone creating learning experiences will use the same standards to assure that design and delivery fits the needs of the department and the learner.

The DHS Training Plan Steering Committee recommends DHS adopt standards for:

- **assessing** the learning needs and desired outcomes to be impacted with training of individuals, employee groups or work teams
- **designing** learning opportunities to achieve training outcomes
- **delivering** training that uses adult learning techniques
- **evaluating** the success of the learning and identifying necessary changes

Employee-Training Council will:

1. **Create a Team** to formalize DHS Training Design and Delivery Standards that strengthen the effectiveness of the time and effort spent in training at DHS. This ad-hoc team will make recommendations to the Employee-Training Council on a guide for presenters, strategies for implementing and communicating these standards and training or coaching on the standards.
2. **Adopt a simple guide** for presenters to use when designing training. It contains standard items such as templates for creating training objectives and evaluations.

3. **Recommend strategies** to communicate the standards throughout the department.
4. **Prepare training staff** to assist presenters in incorporating standards into current learning opportunities.

Learning Management System

In August 2004, DHS is in the final stages of contract negotiations for a Learning Management System. This system will replace the DHS Online Training Registration System and provide additional functionality that changes some workforce development practices and will require establishing some training policies.

LMS FEATURES THAT BRING CHANGE TO DHS TRAINING

- Competency-based training. Competencies for job classifications are input into the LMS and as training is added to the catalog, it is linked to those competencies. An employee can access a list of training specific to their job.
- Launch e-learning. The system will launch a web-based self-study, track progress, bookmark for return later and track test results.
- Content management. The system supports the storage of content used to create web-based self-study. Employees and trainers can access a library of learning materials.
- Testing. The testing feature that can be used for pre- and post-tests—part of the Evaluation Methods being planned for DHS.
- Seminar Creator. This is a template-based program that allows subject matter experts to develop self-study training materials more easily.
- Collaboration tools. These allow employees to participate in discussion groups and other interactive learning activities for a particular curriculum. Also, allows trainers to work together virtually on development of the materials.
- Individual development plans (IDP). The system will generate IDP's based on job function and allow users with their managers to customize these plans to incorporate training and other career activities.

NEXT STEPS

- Convene LMS Implementation Team with members having this project as a priority workload assignment to gain implementation in a six month time period in collaboration with vendor.

DHS Employee Training Plan

Milestones

Milestones

Activity/Milestones	Description	Start Date	End Date	Responsible Persons
DHS Employee Training Plan Approved	Training plan reviewed and approved by Cabinet	November 1, 2004	November 1, 2004	DHS Cabinet
DHS Training-Employee Council (TEC) formed	Members identified; chair designated; first meeting scheduled	November 15, 2004	December 31, 2004	DHS Cabinet: Cabinet sponsor: Chair
Management Training Program: Blast! topics developed	Develop mandatory training topics for new managers	August 1, 2004	December 31, 2004; Implement January 2005-on-going	Management Training Project Manager
Management Training Program: Incumbent Managers	Develop mandatory training for all managers via project plan	TBA	Complete December 31, 2005	Management Training Project Manager

Milestones

Activity/Milestones	Description	Start Date	End Date	Responsible Persons
TEC charters Learning Teams to develop e-wide training topics for customer service, new employee orientation, diversity and team building for team leaders	Highest priority unmet e-wide training for all employees	TBA	December 31, 2004; Implement January 2005-on-going	TEC charters Learning Teams to develop e-wide topics
TEC charters learning team to create training evaluation system	Creates tools to conduct Level 1–3 evaluations: implementation of all levels of evaluation	January 1, 2005	March 31, 2005; October 2006	TEC
TEC charters learning team to develop e-learning strategy	Includes concepts of blended delivery approach to training	January 1, 2005	April 30, 2005	TEC
TEC charters Learning Team to develop design and delivery standards	Develop standards; train employees and implement	January 1, 2005	Develop: March 31, 2005; Train and implement May 1, 2005	TEC

Milestones

Activity/Milestones	Description	Start Date	End Date	Responsible Persons
TEC charters divisions to address unmet cross-division program training needs	Prioritize and address unmet needs	January 1, 2005	Report to TEC March 1, 2005	TEC, Division reps
Training Facilities issues resolved	Co-house Salem based distance learning staff and equipment; establish Salem training facility site; identify regional training rooms	August 18, 2004	Co-house: December 31, 2004; Salem site: March 31, 2005; Regional Sites: June 30, 2005	DHS Facilities Manager
TEC develop plan to phase-in remainder of unmet e-wide training needs	Determine priority for implementation, resource requirements	January 1, 2005	March 31, 2005	TEC
Learning Management System implementation	Task group to begin implementation	October 5, 2004	September 30, 2005	DHS T D Manager, OIS, Division reps

Milestones

Activity/Milestones	Description	Start Date	End Date	Responsible Persons
TEC re-evaluate the DHS Training Plan	Status of Training Plan implementation (Management Development, enterprise-wide training, cross-division needs, e-learning, standards, evaluation, facilities, Employee-Training Council what's been done; assess current priorities; update Plan.	August 1, 2005	September 30, 2005	TEC

DHS Employee Training Plan
Budget

Training Budgets

- John Swanson, Deputy Assistant Director, Finance and Policy Analysis will work with Accounting and the DHS Employee-Training Council to identify a better way to track training budgets and expenditures. This is work that will take place during implementation of the DHS Employee Training Plan.

DHS Training Budgets 2003-2005

Percentage through biennium

62.50%

Cluster/Unit	POS	FTE	2003-05 Budget Authority thru May Disappropriation	2003-05 Expenditures thru Sept 2004	2003-05 Percent Spent BTD	2003-05 Average Budgeted Training Cost Per Employee
Department Wide Support Services						
Director's Office	34	32.83	53,366	27,168	50.91%	1,570
Financial Recovery	98	93.29	79,316	1,149	1.45%	809
Finance & Policy Analysis	58	68.75	79,524	15,548	19.55%	1,371
Administrative Services						
AS Central	9	9.00	5,616	10,030	178.60%	624
Facilities	29	29.00	15,063	544	3.61%	519
Communications	17	16.79	21,317	135	0.63%	1,254
Financial Services	118	115.49	198,100	1,335	0.67%	1,679
Information Systems	383	379.73	1,349,466	228,071	16.90%	3,523
Human Resources	105	102.88	77,019	10,023	13.01%	734
HR- Department Wide Training Unit	-	-	367,011	-	0.00%	
Forms and Document Management	36	35.75	23,001	936	4.07%	639
Contracts and Procurement	31	31.00	20,179	3,819	18.93%	651
Information Security	-	-	53,484	49,946	93.38%	
Total Administrative Services	728	719.64	2,130,256	304,839	14.31%	2,926
Total Department Wide Support Services	918	914.51	2,342,462	348,704	14.89%	6,676
Children, Adults and Families						
All Other Staff Training	223	216.34	196,762	231,265	117.54%	882
Child Welfare Program (Not in PSU contract) Listed Below			801,238	171,024	21.34%	
Total Children, Adults and Families	223	216.34	998,000	402,289	40.31%	882
Child Welfare Program (Not in PSU Contract)						
Child Welfare Training Costs, mileage & per diem			503,238	171,024		
Child Welfare Program Training System of Care						
No training plan submitted for this area.						
Consultants and Dedicated Training for 2003-05						
Total Child Welfare Program Training System of Care			100,000			
Child Welfare Statewide Conferences						
No training plan submitted for this area.						
Conferences for 2003-05						
Total Child Welfare Statewide Conferences			150,000			
Foster/Adopt Parent Training Support			48,000			
(Four statewide coordinators, stipends, child care, etc.)						
Child Welfare Program Total			801,238	171,024		
Community Human Services						
Child Welfare and Self Sufficiency Staff Training	3,854	3,511.84	1,758,917	678,732	38.59%	456
Vocational Rehab Staff Training	223	340.19	322,374	135,235	41.95%	1,446
Total Community Human Services	4,077	3,852.03	2,081,291	813,967	39.11%	1,902
Seniors and People with Disabilities						
All Other Staff Training	1,412	1,375.38	725,863	211,000	29.07%	514
SPD Institutional Staff Training	214	202.48	8,993	19,985	222.23%	42
SPD Field Staff Training (Transferred to SPD).	472	429.99	255,516	61,748	24.17%	541
Total Seniors and People with Disabilities	2,098	2,007.85	990,372	292,733	29.56%	1,097
Health Services						
All Other Staff Training	846	822.42	955,837	465,634	48.71%	1,130
Health Services Institutional Staff Training	1,338	1,295.50	160,098	145,852	91.10%	120
Total Health Services	2,184	2,117.92	1,115,935	611,486	54.80%	1,249
Total Human Services Depart. (exclusive of PSU Training Budget)	9,500	9,108.65	7,528,060	2,469,179	32.80%	11,807
CAF-PSU Training Budget Through February 2004			7,527,235	776,476	10.32%	

DHS Employee Training Plan
Risks and Dependencies

Risks and Dependencies

The successful implementation of the training plan depends on a number of factors beyond the control of its authors.

ACCOUNTABILITY

As stated in the Current State section of the plan, employee training is most often focused on specific program or function training. Although there is some ability to identify and develop enterprise-wide training, there is no systematic way of doing so. The successful implementation of the plan will require the commitment of agency leadership to establish a governing body empowered to assure accountability for the plan's execution. Without a focal point for implementation, training will default to its current state: strong program training, inconsistent standards and limited training for enterprise-wide needs.

RESOURCES

The Steering Committee members reported a shortage of training resources and questioned how the department could fund enterprise-wide training without diminishing their current training efforts. There are a finite numbers of DHS employees who can be assigned to curriculum development efforts and most of these employees are dedicated full time to their divisions.

The governing body should be empowered to establish priorities and identify additional resources required to carry out the plan.

CUSTOMER FOCUS

Many of the identified training needs were stated in broad terms and did not include specific topics. Examples are HR 1, 2 and 3, written communication, customer service, etc. Creating training that meets the needs of the training customers will require the creation of Learning Teams, consisting of subject matter experts, training development specialists and customer representatives to precisely identify needs, instructional objectives and methods of delivery. Without cross-functional team-based development, we risk creating training that does not meet perceived needs and which employees will not attend.

DHS Employee Training Plan

Appendix

DHS Employee Training Plan Overview

- **PURPOSE:** To align DHS employee training and training resources to address DHS's current and emerging organizational priorities and programmatic needs. (*Employee training* includes employees of other entities in the CAF and SPD delivery systems).
- **BACKGROUND:** DHS needs a means to determine if it is making effective and efficient use of resources to meet its greatest training needs. It lacks a comprehensive view of training priorities, activities and dedicated resources. It has no systematic means of evaluating training.
- **SCOPE:** The employee-training plan will include recommendations for how training is created, delivered and evaluated, including recommendations for an infrastructure for a shared delivery system.* The plan will also document training needs, priorities and resources across the enterprise and within each division.
- **OBJECTIVES:**
 - Create a model for governance of training.
 - Create an enterprise-wide management-training program.
 - Identify current training programs and resources.
 - Identify enterprise-wide training priorities
 - Identify a methodology to create division-specific training.
 - Prioritize enterprise-wide training needs.
 - Recommend resources to meet enterprise-wide training needs, including a delivery system.
 - Create guidelines for evaluation criteria and methods.
 - Create guidelines for use of training methodologies.
 - Create standards for training design and delivery.
 - Recommend a process for implementation and communication.
- **PLANNING TEAMS:** DHS will create an Employee Training Plan Steering Committee to review information and recommendations from the DHS Cabinet survey of greatest training needs, the Workforce Management-Steering Committee, Diversity Development Coordinating Council, division-training committees and the Learning Leadership Council. The Steering Committee will make recommendations to the DHS Cabinet.

A final recommended plan is to be completed by August 12, 2004.

*This includes classroom training, distance learning, video-conferencing, facilities, assistance with instructional design, etc.

DHS Cabinet Greatest Training Needs Survey—Enterprise 2004

Sorted by priority

Version 5c.0

August 6, 2004

Prioritized by DHS Training Plan Steering Committee

PURPOSE

The purpose of this document is to consolidate the enterprise-wide training needs into one document. A division specific training is documented in DHS Cabinet Greatest Training Needs Survey—Division Specific. This document identifies the DHS Cabinet Training Needs Survey—Enterprise-wide.

BACKGROUND

This document reflects a question asked of each division by the DHS Deputy in April 2004 of the training needs of the organization. A team from the DHS Learning Leadership Council merged the lists created by the divisions into two lists, one that represents department-wide training and the other one that represents division-specific training.

These documents reflect:

- name and purpose of the training (sorted in alpha order in each division)
- intended audience, i.e., M-manager, S-supervisor, T-technical, LS-line staff and A-all employees
- intended outcome
- current availability and source
- priority rating
- comments, as applicable

MANAGEMENT TRAINING

As of June 2004, the Workforce Management Steering Committee has identified mandatory management training. The following topics are included in the Workforce Management Steering Committee Mandatory Management Modules and, therefore, are being taken off this list as a training need for *managers and supervisors*.

- Budget Basics
- Budget Prep
- Contracting—Administration Negotiating
- Customer Service
- Process Flow Analysis
- Management: Core Management
- Management: Fundamentals of HR Management
- HR—Diversity AA
- Management: Basic Leadership
- Management: Employment Practices
- Management: FMLA/OFLA
- Management: Labor Contract Management

The DHS Training Plan incorporates the decisions to create a Management Development Curriculum. These recommendations are found in a separate section of the DHS Training Plan.

The topics that remain on the following pages with some indication that they are for Managers or Supervisors, are those topics that the Cabinet identified as a great need for staff and managers, but the topics were not included in the Mandatory Management Training Modules.

The Essence of Priority Criteria for Sorting Unmet Enterprise Training Needs

“Enterprise” means—

For all divisions or

For several divisions

(Multi-division, program-related training needs go to divisions to resolve)

This criteria was developed by the DHS Training Plan Steering Committee to prioritize the Unmet Enterprise Training Needs into High, Medium and Low.

- Required by law, rule or policy
- More than one division
- Impact on client/consumer
- Impact on performance measures (Director’s/Governor, DHS, division, program) or success indicators
- Creates efficiency
- Exposes DHS to risk if training is not done
- Supports the department values, or culture, or how we want to do business
- Is there a current resource available, currently?
- Cost of development
- Difficulty in delivery (i.e., resource intensive); cost/benefit
- Potential for alternate delivery—more access for more people
- Sustainability—sustains through changes in leadership
- Honors existing competencies—only train those that need it, or train on what’s needed
- Does it support core competencies?

Name/ Purpose of Training	Intended Audience	Priority 1-20	Comments	Current Classes and/or Potential Resources for Training Delivery	Use
Employee Orientation	ALL*	20	DO: Gary/Cindy would like to meet with new hires for an orientation on a quarterly basis. Need better connection to provide new employee with orientation and materials. Through HR?	<i>Currently:</i> <ul style="list-style-type: none"> Resources for Employee Orientation are on the DHS web page. <i>In development:</i> <ul style="list-style-type: none"> Cross-division group is taking next steps. 	DHS
Confidentiality/ Security HIPAA	ALL	18		<i>Currently:</i> <ul style="list-style-type: none"> DHS TD - HIPAA Privacy Info Security for New Staff (NetLink); Info Security Office - Secure It Video OMAP - HIPAA for OMAP staff - "Secure It" Video <i>In development:</i> <ul style="list-style-type: none"> Privacy Office - Confidentiality 	DHS
Customer Service	ALL	18	[For Managers, this topic is included in mandatory training - Workforce Management Steering Committee]	Potential resources: Vendor In-house: develop custom material for division specific customer service needs	Mix
Reception Staff Training	LS	18	Customer service focus.	<i>Currently</i> <ul style="list-style-type: none"> In development; cross dept design and delivery 	DHS
Diversity - Disability Awareness	ALL	17		<i>Currently:</i> AS: Disability Culture Awareness. Potential resource for additional offerings: NW ADA/IT Center	Both
Ethics	ALL	17	Ethics—as it relates to all staff; common expectations; include case management issues; client interactions. Confidentiality sets the stage. Ethics is a core value. Resource—former HR/Labor ethics materials. For programs, divisions incorporate into core programs ethics as relates to their service/client interactions.	<i>Currently</i> <ul style="list-style-type: none"> DHS TD—Being An Ethical Leader HS/ OIT for county community mental health program staff <i>In development:</i> RFP—DHS Ethics policy development Potential resources for additional offerings: Larimer or Josephson	DHS + Hearn. Use recommendations from Contractor

*M-Manager, S-supervisor, T-technical, LS-line staff and A-all employees

Name/ Purpose of Training	Intended Audience	Priority 1-20	Comments	Current Classes and/or Potential Resources for Training Delivery	Use
People Skills - Conflict Resolution, Hostile Situations/ Understanding Differences; Interpersonal Relationships	All	16	The focus is on 1:1 personal and verbal communication, difficult conversations, negotiating interests vs positions, in work settings, with co-workers, with customers/clients/consumers, with managers.	<p><i>Currently:</i> DHS TD, OMAP and HS/OIT:</p> <ul style="list-style-type: none"> • <i>Conflict Resolution</i> <p>DHS TD:</p> <ul style="list-style-type: none"> • <i>Dealing With Hostile Situations</i> • <i>Understanding Differences (MBTI)</i> <p>CAF Field</p> <ul style="list-style-type: none"> • <i>Strength Based Practice</i> <p>Potential Resources: DAS, EAP, In-house, Higher Ed, Vendor (e.g., Axtell)</p>	Either DHS or outside resource
Facilitation— Meeting Management	All	16	Facilitating group work; task groups; meetings	<p><i>Currently:</i></p> <ul style="list-style-type: none"> • <i>DHS TD —Facilitating Effective Meetings</i> • <i>DAS—currently Facilitating Teams</i> • <i>OMAP—Facilitating Meetings</i> <p>Potential resources: DAS, Community Colleges, Vendors</p>	Either
Communication— Written	ALL	16	<p>Completed staff work. Drafting letters for other’s signatures—can’t preach. Poor writing and grammar; lacks a logical flow to the info. Writing so lay person can understand. Make sentences easier to understand; how to keep writing at a lower reading level.</p> <p>Writing at 8th and 10th grade level. Give those writing to clients, customers and internally to all DHS staff the ability to be able to communicate so that it is universally and easily understood</p>	<p><i>Currently:</i></p> <ul style="list-style-type: none"> • <i>OMHAS - “Writing for Easy Reading”</i> • <i>DAS –Business Writing—send someone to try this out.</i> <p>Potential Resources for additional classes or broader audience: Community Colleges, Vendors</p>	Outside resource
Program Management, Program Evaluation, Performance Measures	LS, S, T, M	16	Outcomes; enterprise wide performance measures Includes things like how to write a business case, systems thinking, outcomes planning, use of data to support decision-making, data analysis, evaluation of past practices, program integrity can’t just be looking at workload.	<p><i>Currently:</i></p> <ul style="list-style-type: none"> • <i>FPA/Cathy Iles</i> • <i>Collaborative Planning Measuring—with intact work teams</i> <p>Potential Resources: In-house with program evaluation subject matter experts Vendor</p>	Mix. Semi-custom.

*M-Manager, S-supervisor, T-technical, LS-line staff and A-all employees

Name/ Purpose of Training	Intended Audience	Priority 1-20	Comments	Current Classes and/or Potential Resources for Training Delivery	Use
ADA and Civil Rights; Alternate Formats	ALL	16	Policy in development; response to OCR agreement. This module would be technical regulations that DHS has to follow. Not management training	<p><i>Currently:</i></p> <ul style="list-style-type: none"> • <i>NW ADA/IT</i> • <i>In development—cross-functional design group; Fall/Winter 2004.</i> <p><i>Currently—alternate formats</i></p> <ul style="list-style-type: none"> • <i>OMAP provides training to OMAP staff.</i> <p>Potential resource: GAO staff</p>	DHS
Diversity - Cultural Competence	ALL	16	USE DDCC RECOMMENDATIONS.	<p><i>Currently:</i></p> <p><i>HS/OIT</i></p> <p>Potential Resources: DAS/Community College Contract Vendors, In-house</p>	Outside resource
People Skills - Team Building	All	15	<p>Focus training on “train the team leader” whoever that is—manager, leadworker, etc. Proactive approach to problems; how to build team so they have a chance for success—decision making; conflict; building effective teams; how to lead teams.</p> <p>Separate from training is to provide resource for intact work teams for team building, conflict resolution, etc.</p>	<p><i>Currently:</i></p> <ul style="list-style-type: none"> • <i>DAS: by request, adhoc team work sessions with intact teams.</i> • <i>DHS TD, limited resource, by request, adhoc teamwork sessions with intact teams.</i> <p>Potential resource for training or resource: Vendor or In-house</p>	Either, DHS, DAS, vendor
Computer Skills—Basic Skills on Word, Excel, Access, GroupWise, Visio, etc.	ALL	15	GroupWise and others customized for DHS—use DHS resource	<p><i>Currently:</i></p> <ul style="list-style-type: none"> • <i>OIS Desktop Training</i> • <i>DAS—currently several</i> • <i>OMAP—Email Essentials, CPT’s Word, Excel, Access</i> <p>Potential resources: Vendors (e.g., New Horizons; CDs)</p>	DHS and outside resource
Process Flow Analysis	T	14	<p>[For Managers, this topic is included in mandatory training - Workforce Management Steering Committee]</p> <p>Consider bringing back Quest.</p>	<p><i>Current:</i></p> <ul style="list-style-type: none"> • <i>AS: Cool Tools for Process Improvement</i> • <i>DAS—Fast Start in Business Systems Analysis</i> <p>Potential resource: Vendor (e.g., Lee Parker)</p>	Outside resource

Name/ Purpose of Training	Intended Audience	Priority 1-20	Comments	Current Classes and/or Potential Resources for Training Delivery	Use
DHS Overview	All	14		<i>Currently:</i> <i>Framework exists. Cross-functional design and delivery in 2002—outdated now.</i>	DHS
Mandatory Reporting	ALL	14	Repeat periodically in addition to new employee orientation	<i>Currently:</i> <ul style="list-style-type: none"> • OMAP Mandatory Reporting • Mandatory Reporter[video] and information in Employee Handbook • New Employee materials on Web <i>In development? (Ramona Rodamaker) workgroup revisiting MR training?</i>	DHS
Budget - Basic Budget Budget Terminology*	T	12	[For Managers, this topic is included in mandatory training - Workforce Management Steering Committee] This training would be for leads, Program Techs, those who monitor budgets or justify carry forwards, extensions	DAS is developing a Budget Course. It may satisfy this need.	DAS and possibly DHS
Project Management	ALL	12	Parameter: Any project management training should be based on PMI standards which DHS embraces as organizational standard for project management. Includes need for software training	<i>Currently:</i> <ul style="list-style-type: none"> • DAS—currently Project Management • OIS - Project Management Series [PMO], • DHS TD - Intro to Project Management • Microsoft Projects: DAS or Vendor • PMI local chapter 	Outside resource with parameters

The training needs described above, rated high and will be resourced for DHS.

The needs described below are lower in priority and will not be resourced by DHS for the enterprise. Managers may send employees as needed.

Budget - Budget prep for program staff	T	11	[For Managers, this topic is included in mandatory training - Workforce Management Steering Committee] AS: include exp tracking	DAS is developing a Budget Course.	
Legislative training	Specific staff	11	HS: for designated staff How a bill becomes a law.	Potential resource: DAS OIS “Bring Your Child To Work Day”	
Time Management	All	11		<i>Currently:</i> <ul style="list-style-type: none"> • DAS: currently Time Management • Coaches on-the-job • OMAP Time Management (In development) Potential resource: Vendor, Community College	

*M-Manager, S-supervisor, T-technical, LS-line staff and A-all employees

Name/ Purpose of Training	Intended Audience	Priority 1-20	Comments	Current Classes and/or Potential Resources for Training Delivery	Use
Administrative Services Overview	S, M	11	Similar to the old “taking care of business” training but shorter and more focused		
Financial - Payroll Timekeeping	All	10		<p><i>Currently:</i></p> <ul style="list-style-type: none"> AS - Payroll for New Employees (NetLink); Payroll for Managers (NetLink). OMAP—All New Employee Payroll Supervisory Pay Roll 	
Financial—SFMA	O	10	How to do the coding. Some level of this is in Management Training also.	<p>Potential resource: DHS Business Experts DAS</p>	
People Skills - Dealing w/Change Resiliency	All	10		<p><i>Currently:</i></p> <ul style="list-style-type: none"> DHS TD - Dealing with Change <p>Potential resources: DAS Vendors</p>	
Contracting - Management	T, O	9	<p>[For Managers, this topic is included in mandatory training - Workforce Management Steering Committee]</p> <p>This training need is for non-managers who deal with contracts.</p>	<p><i>Currently:</i></p> <ul style="list-style-type: none"> AS - Contracts Procurement offers a Contracts module by request. DAS—currently Several 	
Problem Solving	T	9	A problem solving model.	<p>If as a part of process improvement, then use current DHS class: <i>Cool Tools</i>.</p> <p>Potential Resource: Vendor</p>	
Computer Skills—Brio/SQL	LS, T, M	9		<p><i>Currently:</i></p> <ul style="list-style-type: none"> In-house: Brio subject matter experts (e.g., SDA Data staff) <p>Potential Resource: Vendors</p>	
Emergency Action Handbook	ALL	9		<p><i>Currently:</i></p> <ul style="list-style-type: none"> Included in New Employee Orientation on DHS Web Page. OMAP 	

Name/ Purpose of Training	Intended Audience	Priority 1-20	Comments	Current Classes and/or Potential Resources for Training Delivery	Use
Finance - Cost Allocation/ Accounting	M	8	Awareness type of education	<i>Currently:</i> <i>Tami's Unit is going out to visit with Management groups on this topic.</i> Potential resources: Vendor, DAS?	
Contracting - for Services, e.g., negotiating	LS, T	8	S, M –Use Workforce Management Steering Committee Recommendations	<i>Currently:</i> • <i>AS - Contracts Procurement offers a Contracts module by request</i> DAS—currently <i>Several</i>	
Computer Skills - Desktop publishing	LS, T	7	Few staff are trained	Potential resources: DAS, Vendors, Higher Ed OMAP	
Dealing w/Media	Select staff	6		Potential resources: In-house: Office of Public Affairs	
Defensive driving	All	6	For all staff w/driving part of job.	<i>Currently:</i> Vendor: <i>Evergreen—Safe Driver</i>	

Resources for Enterprise Wide Training Needs (other than in-house)

Potential Services	DAS	Community Colleges (e.g., TED Center thru Chemeketa)	PSU— Professional Develop. Center	Contract with Vendor	“Canned” Web-based
Design consultation required	Yes	Yes	Yes	Yes	No, unless contract for custom courses.
Custom Course Design	\$55/hr	\$125-\$150/hr	\$\$	\$\$	Possible.
Delivery of Customized Courses—negotiable.	\$35-100/day	\$175/per hr with 20 students. +Materials.	\$2-\$3000/day	\$200-\$3000/day	Possible.
Delivery of current course offerings (not custom for DHS)	\$35/day \$99/day for software	Yes. Public Catalog. Send employee.	Yes. PSU Catalog—send employee	Yes. Deliver anything for a price.	Yes. Price for access to “library.” May be in range of \$60-\$150/course/person
		Yes. Public Catalog. Dedicate class for DHS.	Yes. Off the shelf offerings - at our locations.		
		Yes. Public Catalog. Can alter class for DHS.			
Delivery methods	Instructor led. In scheduled locations, or at our locations for an increased fee.	Instructor led—at community college; or our locations. Negotiable.	Instructor led at our locations.	Instructor led at our locations.	Online—web-based. Purchase CDs.
		Video conferencing with other community college locations—possible—negotiable.	Possible distance learning methods—would need to explore.		Webinars or other on-line live events.
		Online delivery—possible—negotiable.			Live video conferences.
Contract?	Pay per class. Custom work—interagency.	Use existing Statewide Agreement through DAS.	Interagency Agreement	RFP to resource enterprise need	RFP to resource enterprise need. (“library” access for 1-5 yrs. possibly > \$15k)
Other	DAS Management Development Series: excellent. DAS Catalog.	e.g., for “Communication—Writing” with access to customer for consult—2 wks to develop objectives, approach, content concepts	“Have trainer, will travel”	Lots of choices.	Can work with vendor to “brand” a course with DHS, insert links to policies and forms, etc.

Required: Design consultation with customer to determine objectives for training, business outcomes expected, evaluation component, align content with DHS needs, policies, etc.; select delivery methods or blend; determine best use of resources in making training investment.

In-house resources are an option for design and delivery depending on the topic and availability. (e.g., DHS TD and training folks from divisions)

**DHS Cabinet
Greatest Training Needs Survey—Cross Division
2004**

Sorted by priority

Version 1 .0
Aug 9, 2004

PURPOSE

The purpose of this document is to document those training needs that Cabinet identified that are not enterprise wide training needs, but rather training needs that impact more than one division, but fail to reach enterprise level.

Enterprise wide training needs are documented in the *DHS Cabinet Survey of Greatest Training Needs—Enterprise*.

BACKGROUND

This document reflects a question asked of each division by the DHS Deputy in April 2004 of the training needs of the organization. A Learning Leadership Council task group sorted the entire Cabinet Survey into enterprise and division training needs. The DHS Training Plan Steering Committee further refined the enterprise list by removing those training needs that crossed divisions, but failed to reach an enterprise level.

These documents reflect:

- name and purpose of the training (sorted in alpha order in each division)
- intended audience, i.e., M-manager, S-supervisor, T-technical, LS-line staff and A-all employees
- intended outcome
- current availability and source
- priority rating
- comments, as applicable

ACTION REQUIRED

Those who lead training in their respective divisions, review this list and collaborative with internal partners on how to meet these needs. The DHS Training Plan Steering Committee intended that cross-division learning opportunities be available to all employees through the DHS Online Training Registration System

Name/Purpose of Training	Intended Audience	Priority	Priority Rank	Comments	Current Resources or Potential Resources
Co-managing supports to children with developmental disabilities	LS	SPD: 5	5	Roles and responsibilities for supporting children with developmental disabilities who are also involved in child welfare.	
Computers - New Emerging Technologies	T, M, O	AS: 5	5	Probably only OIS	Potential resources: Vendors
Management - PICS	T	FPA: 5	5		Potential resources: DAS In-house: HR subject matter experts
Computer Skills—DSSURS	Research staff	SPD: 4	4		
Computer Skills—MMIS Basic Screens Training	LS, S, T, M, O	HS: 4	4		<i>Currently:</i> <ul style="list-style-type: none"> • <i>OMAP provides this training for DHS</i>
Electronic Document Management System	All end users of EDMS	4	4	If users were properly trained on accessing the EDMS, the query selection the customer chooses would not be so broad, which has a significant impact on the network traffic limiting access to the system	Potential resource: AS—Wendy's Unit
Poverty Impact on Families	CAF: All	CAF: 4	4		<i>Currently:</i> <ul style="list-style-type: none"> • <i>CAF—currently, in development with PSU for CAF</i> • <i>OSU Extension Service - Poverty Simulation</i>

Name/Purpose of Training	Intended Audience	Priority	Priority Rank	Comments	Current Resources or Potential Resources
Substance Abuse	CAF: All	CAF: 4	4	Issues around this that are HR related will be folded into management training.	<i>Currently: OMHAS and CAF-cw have provided training for employees</i>
Computer Skills—ORBIT and ORBITS		SPD, FPA			
Mental Health Issues	LS, S, T—specific staff		3	Issues around this that are HR related will be folded into management training.	Potential Resource: In-house: OMHAS subject matter experts
OR Intervention System	LS		3	?Where does this belong—Nancy look for a home?	Potential Resource: In-house: SPD subject matter experts

DHS Enterprise Training Project Overview— August 2004

GOALS

- By Dec 31, 2004
 - Training on Customer Service, New Employee Orientation and Team Building for Team Leaders will be available.
 - An implementation plan for addressing the balance of DHS Enterprise Training Needs will be in place with deliverables, milestones.

PARAMETERS

- Employee-Training Council makes initial decisions on resourcing internally or with external sources and identifies overall goals, outcomes and evaluation.
- DHS Training Principles.
- Available resources are key to training design and delivery.

CRITICAL SUCCESS FACTORS

1. Sponsor/champion: Cabinet member or other Executive Leader.
2. Employee-Training Council has the authority to prioritize and allocate resources for development and delivery of enterprise training needs.
3. Cabinet approval is gained when resources for enterprise training are needed that extend beyond the current line item for enterprise training found in the Administrative Services/Office of Human Resources budget.
4. DHS management values their responsibility for developing staff, communicates their expectations, participates in training and provides support for transfer of learning to the job.

Enterprise-wide Training—Major Project Components

Component	Purpose	Who
Sort out priority and resource allocation	<ul style="list-style-type: none"> ▪ Identify which enterprise wide training topics 1st ▪ Prioritize work to be done; multi-phase ▪ Preliminary definition to topics that are only a title now. ▪ Preliminary definition to evaluation components ▪ Determine the appropriateness of who is doing what/TD..... ▪ Ascertain impact of shifting resources (i.e., to free up DHS staff to work on DHS-design training) ▪ Commit resources to enterprise learning team(s) 	DHS Employee-Training Council
Connect with Existing Groups	<ul style="list-style-type: none"> ▪ Identify communication needs for existing classes and delegate—purpose to educate managers on what is available ▪ Establish connection with leads of existing groups developing training initiatives to gain oversight of products and resource commitment 	DHS Employee-Training Council
Curriculum Design Groups <ul style="list-style-type: none"> - Customer Service - New Employee Orientation 	<ul style="list-style-type: none"> ▪ Define topic depth and learning objectives ▪ Link to on-the-job performance ▪ Plan training evaluation ▪ Determine methodology, learning activities and DHS reference material ▪ Identify resources needed (DAS, in-house, contract, off-the-shelf) and communication needs ▪ Gain resource commitment from Employee-Training Council 	Enterprise Learning Team(s) <ul style="list-style-type: none"> - Customers (managers, line staff) - Subject matter experts (SME) - Training lead - Higher level manager or two
Design Work	<ul style="list-style-type: none"> ▪ Create lesson materials ▪ Customize off-the-shelf products ▪ Contractors tailor products for DHS 	Training staff SMEs Learning Team member(s)
Communication and Marketing	<ul style="list-style-type: none"> ▪ Communicate training availability ▪ Engage managers in preparing staff for training ▪ ID support needed for online learning, self-study and OJT. 	DHS Employee-Training Council
Delivery	<ul style="list-style-type: none"> ▪ Perform delivery functions (on-line, classroom, etc.) ▪ Contractors tailor delivery for DHS culture 	SMEs , Training staff, Contractors

Enterprise-wide Training Needs

Workplace Effectiveness	Existing DHS Training	Existing Group Developing Training	Resource Strategy Needed
Customer Service			✓
Reception Staff Training		✓	
People—1:1 Communication:			
Conflict Resolution	✓		
Dealing With Hostile Situations	✓		
Understanding Differences	✓		
Interpersonal Relations, as per Cabinet Survey			✓
Team Building			✓
Team Work with intact teams			✓
Facilitating Meetings and Task Groups	✓		
Ethics		✓	
Diversity—Disability Awareness	✓		
Diversity—Cultural Competency		✓	✓
ADA/OCR		✓	✓
Communication—Written			✓
Department Focus	Existing Training	Existing Group Developing Training	Resource Strategy Needed
New Employee Orientation		✓	✓
Confidentiality (Privacy, Security)	✓	✓	
DHS Overview			✓
Mandatory Reporting (Rodamaker group?)	✓	✓ ?	✓ ?
Program Management, Program Evaluation, Performance Measures			✓
Technical Processes and Skills	Existing Training	Existing Group Developing Training	Resource Strategy Needed
Project Management	✓		
Process Flow Analysis	✓		
Basic Computer Skills	✓		
Basic Budget (DAS class in development)			✓

Existing Groups	Leads
New Employee Orientation	HR, Pat Bouchie/Judy Gerrard
Information Security Awareness Education Team	ISO, Terri Cardinale (TD)
Reception Staff Training	LLC, K. Bennett (CAF), S. Elowson (TD)
DDCC Training Task Groups	HR, Marita Baragli
Mandatory Reporting Group	DO, Ramona Rodamaker (CAF)
ADA/OCR	GAO (Nelson), DHS TD (Cardinale), CAF
Ethics program development	DO AS, in RFP status

Learning Teams

TRAINING NEEDS

A Learning Team whose focus is on a training need or curriculum is to:

- Work with decisions from the Employee-Training Council on
 - Extent of training need
 - Business outcomes expected
 - Any parameters provided (e.g., ½ day or less; use external resource)
- Determine learning objectives
- Develop evaluation component
- Determine content/activities
- Align content with DHS needs, policies, etc.
- Select delivery methods or blend
- Identify strategies that enable transfer of learning to the job
- Make recommendations to Employee-Training Council on training design, delivery and resource commitment needed.

SHARED DELIVERY SYSTEM PROJECTS

A Learning Team whose focus is on a project or initiative related to DHS shared training delivery system or infrastructure is convened to gain input, collaboration and mutual decision-making related to standards, policies, access to or use of those resources that make up the shared training delivery system.

DHS Management Training

- DHS Management Mandatory Training Topics—Project Overview
- DHS Workforce Management System—List of Mandatory Training Module Topics
- Overview
- Management Training Implementation Considerations

DHS Management Mandatory Training Topics Project Overview—July 2004

GOALS:

- By Dec 31, 2005, incumbent managers (approx 800) complete all mandatory training topics.
- By Dec 31, 2004, make available mandatory Blast! topics for new managers.

PARAMETERS:

- Be respectful of managers' time constraints.
 - Keep training sessions as short as possible while still being effective.
 - As feasible, tag session(s) onto existing management gatherings.
 - Topics can be combined. i.e., topic name does not a session make.
- Use any methodology that is feasible and effective: online, classroom, regional delivery, CD, video conferencing, self-study, workbook, etc.
- For in-person training, audience size—can be 10, 100 or more.

CRITICAL SUCCESS FACTORS

Training is intended to result in increased or enhanced KSAs for managers, rather than simply checking off that a session was provided or attended. Therefore, the following are critical to the success of mandatory management training in DHS.

1. Sponsor/champion: Cabinet member or other executive leader.
2. Use Project Management to ensure goals are accomplished.
 - a. Assign Project Manager for at least 18-24 month period.
 - b. Select a small Core Team that includes line managers, training leads, higher level managers
3. Gain agreement from sponsor and Workforce Management Steering Committee on:
 - c. Priorities and project plan;
 - d. For each topic: depth of instruction, objectives, content.
 - e. Use iterative process and multiple check points.
4. Identify how experience or recent training can “count” in place of new training.
5. DHS executive leadership role model the value of management development by communicating expectations, rationale, participating.

Major Project Components		
Component	Purpose	Who
Project Planning	<ul style="list-style-type: none"> • Inventory existing resources • Preliminary definition to topics that are only a title now • Prioritize work to be done; multi-phase • Develop overall evaluation • Identify deliverables and timelines • Identify/allocate resources 	<ul style="list-style-type: none"> - Project Manager, Core Team, Sponsor
Curriculum design groups: <ul style="list-style-type: none"> - HR - Diversity - Management Foundation, Leadership, Teamwork Communication - Risk Resources - Planning Measuring 	<ul style="list-style-type: none"> • Define topic depth and learning objectives • Link to on-the-job performance • Plan training evaluation • Determine methodology, learning activities and DHS reference material • Identify resources needed (DAS, in-house, contract, off-the-shelf) 	<ul style="list-style-type: none"> - Core Team member(s) - Customers (new managers; experienced managers; mid-level and front line) - Subject matter experts - Training lead - Higher-level manager or two
Design Work	<ul style="list-style-type: none"> • Create lesson materials • Customize off-the-shelf products • Contractors tailor products for DHS 	<ul style="list-style-type: none"> - Training staff - SMEs - Core team member(s)
Scheduling	<ul style="list-style-type: none"> • Develop a training schedule • Create catalog of mandatory offerings • Identify resources (e.g., DAS) 	<ul style="list-style-type: none"> - Core team member(s) - Training staff
Delivery	<ul style="list-style-type: none"> • Perform delivery functions (online; classroom; etc.) • Contractors tailor delivery for DHS culture • Coach DHS teaching fellows 	<ul style="list-style-type: none"> - SMEs - DHS teaching fellows - Training staff - Core team member(s)
Communication and Marketing	<ul style="list-style-type: none"> • Communicate expectations to managers, access to resources, payment policy (e.g., DAS) • Engage managers in preparing staff for training • ID support needed for online learning, self-study and OJT. • Enlist enthusiastic participation 	<ul style="list-style-type: none"> - Public Affairs Office - Core Team member(s)

Proposed DHS Management Training: Course Framework (October 2004)

compe ten cy	1	2	3	4	5
	Managing People	Managing Resources	Communication	Planning & Achieving Results	<i>Cultural Competency</i>
Foundation (required)	"Refined version of HR Essentials" additions/deletions	Stewardship OR Govt, DHS Budget Contracts, procurement Audits Travel, Payroll	Audience - consideration All Mediums–Written, oral Interpersonal skills Customer service – mgr role Completed Work- analysis	Emphasis on continual Improvement, Measuring progress, Achieving results, Using technology to help.	<i>Cultural competency</i> <i>Managing diverse workforce</i>
✓ = required; rest optional Targeted	1.1✓Pay/work schedule/time off/ADA	2.1Manage your Budget (to be developed later)	3.1Organizational collaboration & partnering, problem solving, efficiency	4.1Data-informed Decision –making	Extensive input received from managers
	1.2✓Safe, non-hostile violence-free workplace	2.2Contract Administration	3.2Mediation Skills for Mgrs; Negotiation, conflict management	4.2Project Management	
	1.3✓Progressive discipline, employee grievances	2.3Managing Risk (Formerly known as Management Controls)	3.3Writing	4.3Preparing for Action & Measuring for Results	
	1.4✓Position mgmt, class specs, position description, performance appraisals	2.4✓Ethics	3.4 ✓Teamwork	4.4Operationalizing Performance Measures	
		New to State (DAS)		4.5 Using Technology	

Overarching Themes: Service to Customers, Effective Communication, Cultural Competency, Professional Work (Completed Staff work – including analysis).

Threads: Public sector; Ethics; Stewardship; DHS goals; Managers role; DHS Management philosophy: achieve results, service, leadership, managing, developing staff; Personal responsibility for career.

DHS Workforce Management System

Strategy: Training Development of DHS staff

Focus on Management Training

Update v1 6/30/040

Overview

Workforce Management Steering Committee

(WFM-CS) composed of Deputy Assistant Directors has affirmed a strategy related to supporting and enhancing training of DHS staff at all levels DHS-wide. The intended result: staff at all levels will be prepared to do their work and enhanced agency results. The Training Development Strategy is being developed and includes DHS Training Plan (in development) and prior work to define training essential for managers. At the 6/30/04 WFM-SC discussion the committee affirmed the list of trainings for managers and other elements of management training and development.

What

DHS is advancing mandatory DHS Management Training—a comprehensive package of a variety of modules that will support development of

- Aspiring managers
- New managers
- Incumbent managers.

The DHS Workforce Management System Steering Committee has selected the *mandatory* module topics which will later be designed as training courses. Other topics are offered as *electives*. Additional tools and resources will be provided to support on-the-job implementation and continuous learning.

Criteria for the selection of the mandatory module topics:

- advance the DHS Workforce Management System and management succession
- practice of the 8 DHS Management Competencies endorsed by DHS Cabinet
- advance good resource-management practices
- minimize agency risk
- support achievement of organizational results
- advance organizational priorities such as accountability and cultural competence
- increase efficiencies.

Why invest in development of managers?

Managers play a vital role in achievement of the DHS mission and objectives. Managers are essential in ensuring that the organization's resources of time, money, staff and technologies are effectively utilized. When managers are trained, supported and given clear performance expectations, they are better able to lead staff to high performance.

Details

The WFM-SC emphasized that format and delivery of courses must be responsive to time demands of managers, effective learning and timely delivery of modules.

- A module represents a topic area; a module does not necessarily represent a day of training. Modules will be combined as it makes sense. Delivery methods include: in-class (i.e., in-person), online (classroom via web), workbook, at-desk e-learning and others. When conducted in person, training will be conducted in groups (size 10—100); intact workgroups, sometimes one-to-one.
- Design of courses and delivery methods needs to be completed. All courses will describe a managers' responsibility. Additional detailed, advanced classes will be available in some areas. All training will be evaluated to ensure it is effective for learning and that participants are able to use the information on the job.

Getting Started

In advance of launching the DHS Management Training, the cabinet and other agency executives will be taking an active role in preparing managers for training. This includes working to ensure continuity of work while managers are attending training and management input to assure on-the-job application of module topics. In addition to learning through formal training, the Workforce Management Steering Committee supports the availability of developmental opportunities such as rotations, participation on ad hoc groups, etc.

Management Training Implementation Considerations

3 TRACKS OF MANAGEMENT TRAINING

- Track for new managers (with required training identified and electives)
- Regular track for incumbent managers (with required training identified and electives)
- Developmental track for aspiring, potential, candidate pool (offer department-wide, electives identified)

CHARACTERISTICS DESIRED

- Identify required training based on higher risk areas
- Link training to on-the-job performance
- Design is respectful of the time demands of managers and responsive to emerging organizational needs
- Sustainable delivery system
- Utilize existing resources—DAS, DCBS, off-the-shelf and customize, DHS classes, PSU management classes, etc.
- System for on going, updating, refreshing, conducting periodic needs assessment

EVALUATION

- Evaluation component to assure training is on target and has impact
- Level 1 and Level 2 and selected Level 3
- Develop baseline data to evaluate “management development” at Level 4 over longer term

[Note: These broad concepts on Management Training were incorporated into the WFMSC recommendations.]

New Managers

WHO

- Those new in a management classification
- Managers new to DHS from other agencies, outside state government
- Trial service period
- Include developmental managers who are in acting capacity
- Average about 12 new managers per month for last two years

ENROLLMENT

- *Create user friendly document like a catalog (on paper and/or online):
 - The subjects/courses - include competencies taught
 - Identify required training in first 6–8 months
 - Allow time for new manager to demonstrate competence prior to end of 12 month period
- Limited to required courses in 1st year
- Manager and their manager plan, select and enroll
- Use PPP--Professional Progress Planning
 - *(requires training of managers and their managers)

DESIGN

- Focus: how to manage in DHS

*ORIENTATION

- New manager orientation materials designed published (paper/online)
- Design and publish reference tools - (1st 30 days checklist--Red alert list)
- Quarterly new-manager-welcome orientation—Gary in person, NetLink or video conference

PERFORMANCE LINKAGE

- *New managers are supported with assigned coach/mentor
- PPP Professional Progress Planning

* resource gap for new workload

All Incumbent Managers

WHO

- 800–1000 current DHS managers
- Those who are out of initial trial service
- Not new managers

ENROLLMENT

- Open enrollment concept—so that managers attend according to what fits their schedule.
- *Create document like a catalog that shows (online/paper)
 - The courses/subjects—link to competencies
 - How to access
 - Full catalog by September 1, 2005
- *Tracking/training record. (Inconsistent processes in DHS, now)

DESIGN

- Identify courses that exist now and where (DHS, DAS, etc.)
- *Courses needing development (contract or in-house; classroom or on-line)
- Prioritize what courses to bring up when

PERFORMANCE LINKAGE

- Organizational messaging to management about management development

TIME FRAMES

- A time period showing when required courses need to be completed (e.g., two to four years)

* resource gap for new workload

Aspiring-To-Be-Managers

(pattern after SDA2 Leadership Development Program)

WHO

- Line staff interested in going into management
- Consider regional co-horts of 15-25 individuals per year

ENROLLMENT

- *Create document, like a program brochure (online and in paper)
 - Include application process
 - Identify 3-4 required courses to be delivered to intact cohort
 - Identify courses from DHS catalog as electives from which each individual chooses 2-4 to attend

***DESIGN**

- Focus: gaining a sense of the work a manager does in DHS
- DAS Management Development Series: Developmental—required course
- Consider Situational Leadership as another required course
- Assign special work project for participation or completion during year
- Assign coach/mentor for the year

PERFORMANCE LINKAGE

- *Employee and manager use Professional Progress Planning
- Manager of employee involved in cohort process

TIME FRAMES

- Cohorts stay together over 12-month period.

* resource gap for new workload

Sustainable Delivery System

PARAMETERS

- Use a variety of training methods; take advantage of all options: classroom, on-line, off-the-shelf, etc.
- Audience size—25 to 100+
- Time frames—short; combine topics as feasible; use meetings/events as delivery opportunities
- Design—be responsive to time demands of managers attending
- Objectives
- Outcomes
- Effectiveness (via evaluation system)

***PERFORMANCE LINKAGE**

- Training linked to on-the-job performance
- Instructional design incorporates plans for evaluation and performance management
- Includes piloting with managers; includes check and balance with managers and CAF field manager
- Cabinet role modeling—champions, make linkage to performance management; accountability
- Orient managers to what is in management curriculum (by execs)
- Orient hiring managers to new manager curriculum, objectives, prep for their manager, etc.
- Preparation of managers by their manager for expectations of what to learn from training
- Website “My Career” to self assess training needed
- Use Level 3 to assess training—on higher risk topics—sample audience

RESOURCES

- FTE is needed to design, deliver and coach SME’s on design and delivery; work with teaching fellows, temps, contractors; develop web-based self-study; customize online off-the-shelf courses, etc.

* resource gap for new workload

DESIGN OPTIONS

- Contract out certain topics
- In-house design [i.e., can't be contracted out to someone without DHS management experience]
 - Most HR courses
 - Administrative business practices specific to DHS
- Online “off-the-shelf-work” courseware [for self-study]
 - Work with vendor to brand with DHS and insert DHS forms, policy
 - On static topics—things that rarely change, such as sexual harassment
- Trainers provide instructional design support for non-trainer resources
 - Partner with teaching fellows, temps and HR subject matter experts to help design and coach delivery or co-delivery
- Use trainer “integrator” for temps and contractors
- Partner with, to integrate current DHS business goals and organization culture into their material
- Mixed audiences—new, incumbent and aspiring-to-be managers
- Transfer of learning—opportunities to reflect on learning and application: mentoring, brown bags, web-site resources, dialogue with supervisor.

DELIVERY OPTIONS

- Partnership with DAS
 - Work with DAS to provide local/regional workshops
 - Provide funding for managers to attend DAS management training
- Teaching fellows—managers teaching managers
 - Nomination type of process to assure quality of teaching fellows
 - Commit to one to three sessions per year of a topic
 - Needs to be some orientation or educating teaching fellows on expectations and support they will receive to teach
- Temps—quality managers who have retired
- Contract out certain topics
- In-house training resources

Training Evaluation—Report

(submitted by LLC task group to DHS Training Plan Steering Committee)

Kirkpatrick Model of Training Evaluation

Developed by Donald L. Kirkpatrick

- Industry recommendations to balance the cost, workload and resources required for evaluation processes:
 - Level 1—100% of all trainings
 - Level 2—50-60% of trainings
 - Level 3—30% of trainings
 - Level 4—10% of trainings
- Criteria for selecting which courses receive L2-4 evaluation are noted in the following pages.
- To balance workload of L2 and L3 evaluations and lessen the impact on managers of receiving evaluations, use a sampling of participants.
- Acknowledgement in the industry that use of control groups for L2-4 is valuable, yet difficult to implement due to the need to have like conditions and possibility that not training the control group is too detrimental to the business. Suggestions:
 - Only use control groups when feasible. If not, don't use them.
 - For roll outs, may use a group receiving training later in the process as the “control group.”

Evaluating Training Programs—The Four Levels, by Donald L. Kirkpatrick, 1998.

DHS Level 1 Evaluations

Reaction and customer satisfaction

LEVEL 1 EVALUATIONS

- Level 1 evaluations in 100% of DHS training
- Gather information about:
 - Training content—objectives met and relevant
 - Design
 - Delivery mode
 - Instructor
 - Perceived impact on KSA's or outcomes
- Use ASTD format—develop consistent set of core questions with options for additional questions based on content/need
- Link to Individual Development Plan (IDP): Competencies for a position identify training required and time frame

EVALUATIONS GO TO:

- Trainers
- Training manager
- Management group who “owns” the training need or performance issue
- Information reported in quarterly DHS Training Evaluation Report

TYPE OF INFORMATION THAT GETS AGGREGATED AND REPORTED

- % of training with x level of relevant objectives
- % of training with x level of objectives being met
- % of employees who feel they can use the knowledge or perform the tasks embedded in the objectives
- % of employees who made it thru training timely

USED FOR:

- Improving design delivery
- Providing information back to management about the training

ACTIONS NEEDED:

- Convene small group with limited time period to develop core set of questions for all to use in Level 1 evaluations.
- Develop electronic database (LMS, Survey Monkey, Excel, Access, etc.)

DHS Level 2 Evaluations

Learning

LEVEL 2 EVALUATIONS

- Use pre- and post-tests on 50-60% of classes. Do post-test at training or within x time period after training
- Gather information about:
 - Test: knowledge, skills, use or access of reference tools/resources
- Criteria for using L2
 - Required or mandatory training
 - Priority, high risk, or special management interest
 - Contractor designed or delivered

EVALUATIONS GO TO:

- Trainer
- Training manager
- Manager of training participant (depends)
- Management group “owning” training need or performance issue

TYPE OF INFORMATION THAT GETS AGGREGATED AND REPORTED

- % of courses with pre- and post-tests
- % improvement from pre- to post-test
- % of training that is on target as anticipated
- % retention of training concepts after x period of time
- % of training revealing other interventions needed

USED FOR:

- Learning—did students learn what was intended?
- Instructional design feedback
- For manager—indicator of possible performance support needed.

ACTIONS NEEDED:

- Provide “testing training” for those putting together pre- and post-tests
- Develop electronic support for pre- and post-tests
- Divisions identify which trainings for Level 2 evaluation

DHS Level 3 Evaluations

Transfer of learning to the job

LEVEL 3 EVALUATIONS

- Determine method as part of design for course or curriculum
 - Automatic follow up, three months after, to trainee and supervisor
 - Same questions for both—use ASTD questions template
 - Management or lead-worker observations of staff post-training
 - Learner’s self-assessment of transfer of learning
 - Trainer’s observations of trainee in the workplace
 - Peer Review
 - Lead workers coach at the training
- Criteria for using L3
 - Those trainings from L2 that are used frequently
 - Those trainings from L2 that are highest risk, cost impact

EVALUATIONS GO TO (L3 CAN BE GATHERED BY NEUTRAL PARTY):

- Trainer and training manager
- Manager of training participant
- Management group “owning” training need or performance issue

TYPE OF INFORMATION THAT GETS AGGREGATED AND REPORTED

- % of staff who transfer learning to job
- % of staff retaining learning
- % of staff-workplace changes that are discovered
- % of audits revealing training needs or issues

USED FOR:

- Feedback on instructional design
- Performance improvement on the job
- Evaluate work system supporting learner

ACTIONS NEEDED:

- Convene task group for limited time to develop core set of L3 questions
- Develop electronic support for Level 3 evaluations
- Divisions identify pilots for Level 3 evaluation
- Identify resource considerations

DHS Level 4 Evaluations

Impact on Intended Outcomes

LEVEL 4 EVALUATIONS

- Key performance indicators and data sources must be identified in initial design of training. Examples:
 - Error/accuracy rates
 - Program indicators
 - Customer satisfaction
 - Complaints– # or type changes
 - Reduced costs
 - Audits
 - Degree of compliance
 - Grievances
 - Cycle time—e.g., app processing
 - Quantity with quality
 - Risk management numbers
- Managers, trainers and partners who provide services work in partnership to design training, including evaluation (managers identifying critical skills or knowledge)
- Criteria to use Level 4
 - Most costly training
 - Highest risk areas
 - Management interest

EVALUATIONS GO TO (L4 CAN BE GATHERED BY NEUTRAL PARTY):

- Trainers
- Training manager
- Management group that “owns” the training need or performance issue

TYPE OF INFORMATION THAT GETS AGGREGATED AND REPORTED

- % increase and decrease in performance indicators (measures, outcomes)
- Evidence that indicates training had impact on the percentage of change

USED FOR:

- Decisions about training program retention or alternations
- Decisions about changes to workforce development system supporting the learner

ACTIONS NEEDED:

- Divisions select at least one training class or event for L4
- Assign research or evaluation resources to assist L4 process—in-house evaluation groups, contract out, work with university
- Convene small team to work out expectations and details for L4

DHS Employee Training Plan

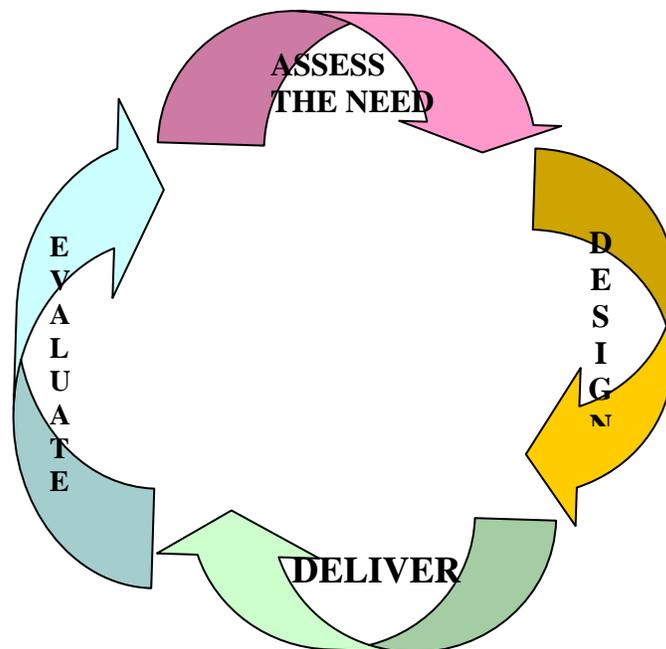
Standards for Training Design and Delivery

BACKGROUND

Training outcomes will be more effective with standards that apply department wide to classroom, distance, video and self-instruction efforts. Everyone creating learning experiences will use the same standards to assure that design and delivery fit the needs of the department and the learner.

RECOMMENDATIONS

- Objectives: Adopt standards for each design and delivery phase



- Adopt standards for:
 - **assessing** the learning needs and desired outcomes to be impacted with training of individuals, employee groups or work teams
 - **designing** learning opportunities to achieve training outcomes
 - **delivering** training that uses adult learning techniques
 - **evaluating** the success of the learning and identifying necessary changes

7

Definitions of Instructional Design

PROPOSED STANDARDS FOR TRAINING DESIGN AND DELIVERY

To assure maximum impact and effectiveness, all training designs and delivery have:

- customer involvement such as input from managers, subject matter experts
- an assessment to determine if training is the appropriate solution. Other options may be office-process improvement or individual coaching with feedback and such
- instructional objectives that are based on adult-learning principles and reflect department mission, goals, values and initiatives
- selection of proper delivery methods based on criteria from the DHS Training Plan: such as classroom, video-conference, self-study
- an evaluation plan of the appropriate level (see “Example” on next page)
- presenters who apply these common standards
- presenter/learner materials that incorporate these standards and guidelines as may be developed from time to time

design and *delivery* standards use sources commonly recognized in the training profession:

- Robert Mager’s materials when assessing needs and writing instructional objectives
- Benjamin Bloom’s taxonomy when developing objectives
- Donald Kirkpatrick’s model when developing evaluations

NEXT STEPS

- **Create a Team** to formalize DHS Training Design and Delivery Standards that strengthen the effectiveness of the time and effort spent in training at DHS. This ad-hoc team will work with the Employee-Training Council to implement and communicate these standards.
- **Adopt a simple guide** for presenters to use when designing training. It contains standard items such as templates for creating training objectives and evaluations.
- **Recommend strategies** to communicate the standards throughout the department.
- **Prepare training staff** to assist presenters in incorporating standards into current learning opportunities.

EXAMPLE GUIDE

TRAINING DESIGN AND DELIVERY GUIDE		
OVER ALL PURPOSE OF TRAINING:		
ASSESSMENT (Who, What, How, How Well) The instructional objective of this learning experience is:		
EVALUATION METHODOLOGY Consider how the course will be evaluated.		
COURSE OUTLINE Use adult learning principles:		
CONNECTIONS TO BE CONSIDERED Directions: In addition to the knowledge, skills techniques to be trained, the following items should be considered in all presentations. Please indicate where each topic is addressed in the design plan.		
✓	EXAMPLES	LOCATION IN DESIGN PLAN
	The relationship of the course to the department's mission and current initiatives.	
	Real life examples that incorporate role modeling, reinforcement of goals.	
	Values and behaviors found in a diverse and harassment-free workplace.	
	The confidentiality of information.	
Prepared by:		Date:

EXAMPLE EVALUATION INFORMATION

Levels of Evaluation (based on Kirkpatrick's Model)

1. Students' Reaction
2. Learning Results
3. Transfer of Learning
4. Business Result

Methodologies

E-Learning/Blended Learning: Background

LIMITED ACCESS TO TRAINING

DAS Administrative Restrictions have caused managers to limit training travel and per diem. Throughout DHS, managers and staff have voiced an interest in having more training to develop skill sets required for job performance. DHS training delivery systems lack the capacity to provide access to training for all employees involved in the delivery of services to clients, consumers and internal customers.

CLASSROOM DELIVERY

DHS has long relied upon classroom training. Face-to-face training is valued because it provides access to subject matter experts, networking and confirmation that training objectives are met. Accessible by schedule and limited locations in Salem or field offices, there is a perception that classroom is the most effective method.

VIRTUAL CLASSROOM

NetLink, a virtual classroom product, has replaced NetCast and delivers live training over the Internet with interactive and assessment features that engage employees in the learning experience. A department-wide cohort has been trained and is working together to implement/increase use. NetLink is accessible by schedule with delivery to an employee's computer at the worksite. Original studio at Winema and new studio at Cherry Avenue (CAF), provide capability to do simultaneous sessions or book out an entire weekly schedule.

LEARNING MANAGEMENT SYSTEM (LMS)

DHS is in contract negotiations for a LMS that will replace the Online Training Registration System and provide the technical structure to launch e-learning materials, track progress and testing results. The product comes with collaborative tools that allow employees to participate in online interactive learning activities.

DHS LOCATIONS AND STAFF PROVIDING E-LEARNING SERVICES

Staff	AS TD Winema	OIS Cherry	CAF Cherry	SPD HSB	HS
TD Spc 2	3 full time 2 LD		5 full time		
Developmental	1 full time				
Support Staff	1 part time		2 full time		
PT 2				1 part time	1 part time
ISS 4		3 full time			
ISS 5		1 full time			
Public Health Ed					1 part time

DHS Training Methodologies

E-Learning/Blended Learning: Research Findings

CLASSROOM vs. E-LEARNING

- “No significant difference”—with quality instructional design for classroom and for e-learning, participants can learn as effectively with e-learning as with classroom. It isn’t either/or, it is both/and—blend classroom and e-learning.

ADDRESSING MULTIPLE LEARNING STYLES

- E-learning is “learner centric”—anytime/anywhere access, progress at own pace, test out of segments, access only that information you need to know, repeat as needed, access experts and resources through links, allows focus without extraneous classroom interruptions, QA, etc.
- Activities, interaction, feedback, navigation and discussion threads—all methods to engage learning styles, keep learner motivated.
- Simulations, case studies and other activities can teach higher levels—decision-making, evaluation.

MOVING CLASSROOM CONTENT TO POWERPOINT

- PowerPoint “page-turners” are ineffective, employees won’t use them, word of mouth from one part of DHS will negatively impact the e-learning efforts in any part of DHS.
- Research shows that DHS must pay attention to content, ensuring it is designed to keep the learner engaged.
- Effective e-learning chunks content into small bites, modularized, focused in on key points. It blends on-line and off-line solutions for topics or entire curriculum.

INDIVIDUAL vs. TEAM DEVELOPMENT

- E-learning development is best done in teams bringing experts together for instructional design, interface design, text, subject matter, graphics, testing, software use and inter-operability. Development is best done using an iterative, rapid process.

IN-HOUSE DEVELOPMENT OR CONTRACT

- Critical success factor for organizational support: an effective initial e-learning. Consider contracting out and simultaneously for train-the-trainer.
- Existing staff will need training in order to acquire skill sets for e-learning development. Learning activities, processes and interactions are completely different than classroom.

DHS Training Methodologies

E-Learning/Blended Learning: Glossary

BLENDED LEARNING:

Learning events that combine aspects of online and face-to-face instruction.

E-LEARNING:

A wide set of applications and processes, such as Web-based learning, computer-based learning, virtual classrooms and digital collaboration. It includes the delivery of content via Internet, intranet/extranet (LAN/WAN), audio- and videotape, videoconference, satellite broadcast, interactive TV, CD-ROM and more.

SHARED E-LEARNING INFRASTRUCTURE:

- Standards driven technical architecture that can link to existing systems and be accessed efficiently by all divisions. Common authoring tools
- Experiences and content that make learning compelling, engaging and relevant to audience needs. Design and delivery standards
- Capacity building through training of staff in e-learning development
- Practices that support acceptance of e-learning in the workplace, at the desktop and enterprise-learning management
- Ongoing exploration of technology and tools for e-learning
- Marketing e-learning initiatives, involving managers
- Methods to evaluate effectiveness of e-learning solutions
- Shared facilities, computer labs and studios

E-Learning/Blended Learning: References

- Allen, Michael. Michael Allen's Guide to E-Learning, Wiley Sons, 2003.
- Brinkerhoff, Robert. High Impact Learning. Perseus Publishing, 2001.
- Lynch, Dr. Maggie McVay. Meeting, July 19, 2004 with DHS leaders.
- Rosenberg, Marc. E-Learning: Strategies for Delivering Knowledge in the Digital Age, McGraw-Hill, 2000.
- Rosenberg, Marc. "Building a Successful E-Learning Strategy," ASTD TechKnowledge Presentation, 2003.
- Industry articles on e-learning design, delivery and infrastructure from:
 - o Chief Learning Officer*
 - o Training Magazine*
 - o Learning Circuits*
 - o Training Development Journal*

DHS Training Methodologies—Decision Guidelines

OVERARCHING PRINCIPLES

All training methods have benefits and detractors. Strong consideration needs to be given to several factors that balance training needs and expected outcomes with logistics and available resources.

- Training is developed in partnership with those requesting the training.
- Curriculum developer and/or subject matter expert assist in the decision of the most appropriate method to present the information to audience.
- Standards for training design and delivery are to be consulted.
- The evaluation component is considered early in the initial phases of the training-design process.

CONSIDERATIONS FOR SELECTING METHODOLOGY

To make the best use of training resources, considerations, including cost, must be weighed when designing and planning training and selecting delivery methods.

- Audience need, subject matter, objectives
- Timing for the training
- Volume of training that will be needed
- Audience work location
- Time away from worksite
- Workload impact on those in office
- Support required to transfer learning to job
- Trainers
- Materials, preparation and production
- Training locations
- Room and equipment rentals
- Cost of equipment for electronic training such as computer hardware, software and set-up, headphones, servers, site rental
- Per-diem or costs associated with attending training
- Cost of hiring someone to prepare training
- Cost of purchasing and customizing ready-designed materials
- Cost of staff NOT knowing the information they would learn in the course
- Cost of utilizing blended approach to training
- Learner preparation for new methods
- Extent to which topic is sensitive and will require one method over another as a result

Classroom Training

<i>Optimal Use</i>	<i>Strength</i>	<i>Opportunity/Challenges</i>
<ul style="list-style-type: none"> • Need for observation in class setting • Skill development • Interviewing Skills • Team Building • Facilitation • Diversity training • Need for small- or large-group discussions • In depth policy based training • Computer related training • Discussion of culture or philosophy 	<ul style="list-style-type: none"> • Flexibility in structure • Provides learners time to interact with other learners and instructor • Worker is away from work-site and can concentrate on learning • Helps break down barriers between divisions 	<ul style="list-style-type: none"> • Train-the-trainer cost • Adult learning principle consideration (some audience members “learn best” in classroom setting) • Resources, such as classrooms • Takes time to create good training materials • Supervisors may ask that learner maintain contact with daily work (receive phone calls, attend hearings, etc.) • Reduction in the number of classrooms

NetLink Training

<i>Optimal Use</i>	<i>Strength</i>	<i>Opportunity/Challenges</i>
<ul style="list-style-type: none"> • Information sharing • Policy-related training • When audience is dispersed • When performance observation is not required • Large group information disbursement • Small group trainings (5-10 people) • Blended learning situation 	<ul style="list-style-type: none"> • Can measure objectives and/or performance • Ability to “test” participant • Real-time • Very interactive • Reduces travel costs • Instant feedback to questions • Expert led • Learning is very focused • Retention is better • Can see the desktop for computer application training (application sharing) 	<ul style="list-style-type: none"> • Technical or keyboard training • Length of time to hold training • Limited by licenses (75-100) • Keep trainings to small groups • Need a producer to manage the virtual classroom • Increase in resources to support NetLink: studio space, licenses, staff time to develop • Need to provide protected time for learner on-site

Computer Based (Self-Guided) Training

<i>Optimal Use</i>	<i>Strength</i>	<i>Opportunity/Challenges</i>
<ul style="list-style-type: none"> • Content is fairly static • Simulations • Audience is dispersed • Performance that requires practice or verification • Pre-work to a classroom • Performers who can schedule their own time • Remediation • High turnover • Need to reach a wide audience at once or quickly 	<ul style="list-style-type: none"> • Always available • Repeatable • Everyone has same message - consistency • Easier to keep users updated with current information • Reduce travel costs 	<ul style="list-style-type: none"> • Team based development—subject matter expert, e-learning software, graphics, instructional design • Cost can be considerable if you require media-rich content • Learner motivation • If you need to observe the performers • Real-time knowledge sharing

Discussion Threads and E-mail

<i>Optimal Use</i>	<i>Strength</i>	<i>Opportunity/Challenges</i>
<ul style="list-style-type: none"> • Pre-work and follow-up questions • Need to share information and answers to questions—very interactive for those who participate 	<ul style="list-style-type: none"> • Our current technology can support it • Quick • Allows the worker to schedule their participation • Easy to implement • Connects the participants in that they learn from each other • Reduce travel cost • LMS has collaboration tools 	<ul style="list-style-type: none"> • Motivation • Creation maintenance of user lists • Overuse of e-mail for all their work—doesn't ensure they will use it • Need a host or moderator (for discussion threads or e-mails that demand a response) • Can get off topic

Video Conference Training		
<i>Optimal Use</i>	<i>Strength</i>	<i>Opportunity/Challenges</i>
<ul style="list-style-type: none"> • Effective for meetings • Information dumps • Case staffings • Technical assistance, i.e., SACWIS 	<ul style="list-style-type: none"> • Visual media; easier to understand parties (rather than computer-based or telephone-based training) • Can use existing equipment, i.e., at schools, community colleges, DOJ, etc. 	<ul style="list-style-type: none"> • Sharing documents is challenging • Expense • Sound, “pixelation,” scheduling, coordination • Compatibility between various systems and equipment • Local coordination • Structure • DAS Administration Restrictions encourage video conferencing as an alternative to meeting in person

Conferences		
<i>Optimal Use</i>	<i>Strength</i>	<i>Opportunity/Challenges</i>
<ul style="list-style-type: none"> • Need for getting a lot of information out in short amount of time • Strengthen practice • Networking/building community of practice • New policy/practice 	<ul style="list-style-type: none"> • Staff have ability to work with other professionals • Hosting large groups • Able to have many topics covered in one venue 	<ul style="list-style-type: none"> • Scheduling • Cost • Appearance/political issues • Travel expense

Outside Vendors

<i>Optimal Use</i>	<i>Strength</i>	<i>Opportunity/Challenges</i>
<ul style="list-style-type: none"> • Consistent ongoing training to be delivered • Staffing resources not sufficient to keep in-house • Core or initial training for staff 	<ul style="list-style-type: none"> • Flexible • Credibility • Often training already exists, no need to develop in-house • Development of training in a short amount of time • Capacity building: Can contract for train-the-trainer and DHS ownership of materials 	<ul style="list-style-type: none"> • Keeping materials updated and fresh • Cost • Ensuring that training truly meets the current needs of the department

Mentoring and On-the-Job Training

<i>Optimal Use</i>	<i>Strength</i>	<i>Challenges</i>
<ul style="list-style-type: none"> • Increase individual employee and/or supervisor goals, skills, abilities, awareness • Directed retention/ advancement efforts • Team building • Management development • Peer-to-peer support • Career development • Specific skill (short-term) 	<ul style="list-style-type: none"> • Evidence that it works: retention, advancement, job skill development • Low cost • Limited travel/time • DDCC plan • Workforce M. plan • Local control • Ties easily to an Individual Development Plan • Can use Online Training Registration System • Combines a number of delivery methods • Focused on specific task • Office culture/politics considered • Ability to work with real situations 	<ul style="list-style-type: none"> • Needs staff /resource support to sustain • Staff time commitment • Difficult to track • Outcomes are a challenge to measure • Not effective format for all learning needed • Difficult to control quality • Accuracy of program-related materials • Time/resource necessary for one-on-one coaching

In-Service or Brown Bag

<i>Optimal Use</i>	<i>Strength</i>	<i>Challenges</i>
<ul style="list-style-type: none"> • Local policy or DHS policy • Team building • Diversity Awareness • Management development • Stakeholder/focus group activities • Efforts to increase partnership i.e., In-service with HIV testers 	<ul style="list-style-type: none"> • Low cost • Limited staff time • Local control • Developmental for provider of in service • Could use OLTRS • Outcome could be immediate and easily measured • Supports self-directed learning and agency value re: continuous learning • Promotes team work • Could promote cross-team work 	<ul style="list-style-type: none"> • Difficult to control quality • Quality range significant • Perception that it isn't worthwhile • May overwhelm OLTRS or take too much time • Long-term outcomes could be difficult to measure

Technical Assistance

<i>Optimal Use</i>	<i>Strength</i>	<i>Challenges</i>
<ul style="list-style-type: none"> ● Working with/for clients ● OIS ● Systems implementation ● Introduction of evidence-based practices ● Information sharing on new policy ● QA on policy or procedures ● Case management consultation for individuals or work teams 	<ul style="list-style-type: none"> ● Evidence that this is most effective way to change practice/system ● All methodologies could be part of delivery ● Local control ● Specific need addressed ● Outcomes could be measured ● Individual and system change can be implemented 	<ul style="list-style-type: none"> ● Cost can be considerable, if provided by outside contractors ● Cost to measure outcomes could be considerable ● Staff time and perception

Description Of Training By Division August 2004

KEY: M-Manager, S-supervisor, T-technical, LS-line staff, O-Other and A-all employees

DESCRIPTION OF TRAINING	TARGET AUDIENCE
<i>Administrative Services*</i>	
*Department-Wide Services includes AS, FPA; the D.O. Training resources are in AS	
HR—Management Refreshers	Managers
Essentials of HR Management	Managers
TINS (Threat Incident Notification System)	Managers
Other safety topics	Managers
Contract Development Administration	Managers
Management Controls	All Staff
Collaborative Planning and Measuring	Work Teams
SPOTS (Small Purchase Order Transaction System)	Managers, Admin Staff
Payroll for New Employees	New Staff
Payroll for Managers	Managers
<i>Administrative Services — DHS Training & Development</i>	
Dealing with Hostile Situations	Staff
Being an Ethical Leader	Managers
Conflict Resolution	Staff, managers
Managing Through Change	Managers
Understanding Differences	Staff, managers
Facilitating Effective Meetings	Staff, managers
Cool Tools: Process Improvement	Staff, managers
Intro. to Project Management	Staff, managers
Disability Culture Awareness	Staff, managers
Training Skills	Staff
Distance Learning—NetLink sessions, NetLink technical support, e-learning instructional design and delivery, consultation, video production	Line staff or managers
On Line Training Registration System	Special requests
Various—coach, consult, coordinate design/delivery for dept. projects (e.g., Information Security)	As requested
<i>Administrative Services — OIS</i>	
Desktop applications—such as GroupWise, Hummingbird, Word, Excel, PowerPoint, Electronic File Management, Internet	All DHS staff
Local Technical Specialist (LTS) training	IS Staff and LTS staff in the

DESCRIPTION OF TRAINING	TARGET AUDIENCE
	field
NetLink orientations	Help Desk, Field Technicians, OIS Managers
Application-specific rollouts and special projects (e.g., new version of GroupWise, Remedy Help Desk Software, Metaframe, Faxserve)	All DHS staff
Project Management classes—such as Sponsorship Training, Estimating, Planning, Initiation, etc.	OIS staff and others interested in Project Management
<i>Children, Adult and Families—FACIS</i>	
Introduction to FACIS (Family and Children Information System)—tour of the FACIS application	New Hires or any FACIS user
FACIS, Plans, Services	Support staff, CMC, CET's. On-going workers need to have basic info on understanding their plans, services
FACIS, Forms, Case Notes	All FACIS users responsible for 147 Series and all employees that must record client contact in case notes
FACIS, Screening, Assessment (GAP)	CET's, Protective Services Unit, Screeners and go-out workers
Basic FACIS	All users, requires user to have Introduction to FACIS before attending. Good for CET's, supervisors, CW managers
FACIS for Supervisors	Train the Trainers, CET's, PS supervisors, other CW supervisors
CWP (Child Welfare Partnership) Core/FACIS	CW employees attending Core Training with CWP
CWP Casework Practice/FACIS	CW employees attending Casework Practice with CWP
Other classes specifically tailored to the need of the branch or SDA.	As requested
<i>Children, Adults and Families—Child Welfare</i>	
Mandatory Reporter Training	DHS Staff
Portland State University—e.g., Case Work Practice, CPS (Child Protective Services) Core, SSA	Child Welfare Staff

DESCRIPTION OF TRAINING	TARGET AUDIENCE
Training; Supervising for Excellence	
Strength Based Practice	DHS staff
Miscellaneous Policy Training	CW staff
<i>Children, Adults and Families — Policy Training</i>	
Food Stamp Eligibility	HSS3
ERDC (Day Care)	HSS3
TANF Eligibility and Case Management	HSS3
Non-Citizen	HSS3
In-house training for Direct Pay Unit (DPU) Staff	DPU Staff
How to process AFS7494 including TRACS and NOTM systems	DPU Staff CRU Staff
Quality Control of CCB/JCCB including updating Provider Pay computer system.	DPU Staff
Processing provider/client overpayments	DPU Staff
Processing adjustments to provider payments	DPU Staff
Overview of DPU and Child Care Programs including unit expectations, basic phone usage, review of Child Care Provider and Parent Guides	DPU Staff
GroupWise	DPU Staff
OHP Eligibility	SPC Eligibility workers
OHP Domestic Violence	SPC Eligibility workers
OHP Eligibility Modules	SPC Eligibility workers
OHP Reviews (training issues)	SPC workers
Presumptive Medical Screening	SPD Eligibility workers
OSIPM Eligibility	SPD Eligibility workers
Senior Prescription Drug Asst. Eligibility	SPC workers
Children's Medical Project	SPC Eligibility workers
<i>Children, Adults and Families—Vocational-Rehabilitation</i>	
New counselor training (basics of voc rehab process, caseload management)	New counselors
Program policy training	All OVRS staff
Overview of Rehab Act, responsibilities of hearings officers and mediators	All Hearings Officers, mediators
<i>Health Services — Investigations And Training (OIT)</i>	
Basic Service Coord. Training on Mandatory Abuse	LS, S, M, O
Mandatory Reporting	LS, S, M
Mental Health Issues	LS, T, S, M
Basic Developmental Disability Awareness	LS, S, T

DESCRIPTION OF TRAINING	TARGET AUDIENCE
Protective Services Investigation Training	County staff on investigations, providers, All staff
Protective Services Investigation (PSI) Report Writing	Investigators, county staff, LS/S
Adult Protective Services (APS)/Law Enforcement Agency (LEA) Training	LEA, APS staff, county investigators
Forensic Wound Analysis	M, O (county investigators)
Evidence Photography and Documentation	M, O (county investigators)
Cultural Competency	M, O, LS, T, all staff
Conflict Management	All staff
S.A.M. (Sorting and Mapping)	PSI investigators, county staff
Workforce Enhancement (Communications—Culture)	All state-operated program staff
Advanced Interviewing Skills	PSI investigators, county staff, LS, M, S
PATH Strategic Planning	Multi-Disciplinary Teams, statewide abuse workers, LEA, county staff
Ethics	M, LS, S, O (county community mental health program staff)
In-Home Investigations	LS, T, S, M (county PSI staff)
Medications—Use and Side Effects for Mental Health Consumers	S, M, LS, O (all county PSI investigators), LEA
<i>Health Services — OMAP</i>	
OMAP Introduction Workshop	LS, S, T, M, O
E-mail Essentials	LS, S, T, M, O
Alternate Format Training	LS, S, T, M, O
Online Payroll Time Capture	LS, S, T, M, O
HIPAA-related training	LS, S, T, M, O
MMIS Basic Screens Training	LS, S, T, M, O
Online Screens Training for Providers (OLG OLM screens)	O
OSCI Telecommunications Training Module	O
Medical Unit Training Module	LS
New Employee Basic Training Module	LS, S, T, M, O
Change and Transition	LS, S, T, M, O
CMS 1500 Billing	O
Conflict Resolution	LS, S, T, M, O
Customer Service in the Public Sector	O, LS, S, T, M

DESCRIPTION OF TRAINING	TARGET AUDIENCE
Diversity Plan	LS, S, T, M
Diversity Series	LS, S, T, M
OAR Training	LS, S, T, M, O
OMAP 1036 Form Training	LS, S, T, M, O
OMAP 505	LS, S, T, M, O
Emergency Action Handbook	LS, S, T, M, O
Claims Management Worksheet	LS, O
Policy and Program Training	LS, S, T, M, O
Provider Billing Training	LS, O
Job Specific Training	LS, O
DSSURS Training	LS, S, T,
<i>Health Services — OMHAS</i>	
Alcohol, Tobacco and other Drug (ATOD) Trainings: Identification, Intervention and Referral. Evidence-based practices including Motivational Interviewing and ASAM PPC 2R.	DHS staff, community partners, ATOD service providers and allied social service providers
ATOD Prevention includes, Community Mobilization, Risk and Protective Factors and other Evidence-Based Practices	ATOD Prevention Coordinators and community members
Mental Health Prevention, Intervention and Treatment Evidence-Based practices such as supported employment	Mental Health Providers and allied service providers
<i>OMHAS primarily provides training to community providers and partners. Much of the training funds are from the Federal Mental Health and ATOD Block Grants.</i>	
<i>Seniors and People with Disabilities</i>	
Eligibility 101	Field
Eligibility 201	Field
Medicaid Services	Field
Employed Persons w/ Disabilities Prog. Eligibil.	Field
512 System Training	Field
Client Assessment Planning System Assessment/Case Management	Field
Employment Initiative	Field
Netcasts—various topics	Field
General Assistance Program	Field
Train the Trainer	Field
Adult Protective Service for Facilities	Field
Community Adult Protective Services	Field
Legal Issues for APS	Field
Adult Foster Care Licenser Training	Field

DESCRIPTION OF TRAINING	TARGET AUDIENCE
Basic Case Management Training	New case managers in DD field
Pre-Admission Screening Trainings	SPD PAS staff
Regional Forums	Case managers Personal Agents Title XIX Specialists Providers
Other training as identified/directed by management staff	To be determined

FTE Training Percentages by Division

CLASSIFICATION	CAF						DWSS		HS				SPD		Totals BY CLUSTER	
	Child Welfare		Self Sufficiency		Voc-Rehab		AS FPA, DO		OIT		OMAP		OMHAS		#	FTE
	#		#		#		#		#		#		#			
Account. Tech. 3							1	0.03							1	0.03
Admin Sp 1			1	0.25							1	1			2	0.25
Consult.Ed.Trainer	65	3.25													65	3.25
Contract & Procur. Sp.							1	0.1							1	0.1
Human Serv. Spec.4			1	0.25											1	0.25
Human Res. Generalist							30	3							30	3
Information Spec.	2	2													2	2
Info. Sys. Spec. 4							3	3							3	3
Info. Sys. Spec. 5							1	1							1	1
Info. Sys. Spec. 6							1	0.2							1	0.2
Investigator 3									2	0.2					2	0.2
Office Spec. 1							1	0.01							1	0.01
Office Spec. 2									1	0.05					1	0.15
Principal Contrib. 2							1	0.15							1	0.15
Proj. Mgr 2							1	0.1							1	0.1
Prin. Exec. Mgr. C					1	0.1	1	0.03							2	0.03
Prin. Exec. Mgr. D							1	0.05	1	0.1					2	0.05
Prin. Exec. Mgr. E							1	0.2							1	0.15
Program Rep 1	1	0.1	6	2.9											7	2.1
Program Rep 2													1	0.05	1	
Program Tech 2	9	1.35	14	2.3	4	0.4	1	1	3	0.15			8	0.8	11	2.2
Pub.Serv.Rep.4			1	1											1	1
Purchasing Agent							1	0.05							1	0.05
Train. & Dev. Sp 2	1	1	9	8.15	1	1	7	6.1	1	1	2	2	2	2	23	21.15
Train. & Dev. Sp 2 (woc)							1	1							1	1
Voc-Rehab Couns. Spec					15	1.5									15	1.5
<i>Number of workers</i>	78		29		21		53		8		3		10		12	217
TOTAL FTE		7.7		14.85		3		16.02		1.5		3		2.8		51.12

Training Plan Updates

Plan Updates

Nov 2004: DHS Cabinet accepted the Recommendations in the DHS Training plan and established the DHS Employee Training Council to carry out this Plan.

2005: DHS Management training curriculum was created; all managers trained in 2005; all new DHS managers are required to attend.

2005: DHS Core Values adopted by DHS Executive Team and process begun to train managers first, then all staff as core values become a part of DHS organization culture.

2006: *DHS New Employee Orientation* course and system of onboarding is re-established through cross-department task group design and shared delivery between CAF, SPD and ASD.

2006: *Building Effective Teams* course is designed and offered as elective in managers curriculum, and offered by request to individual work teams.

2006: Professional development for subject matter experts who train as part of their job, a *Train-the-Trainer* course is added to DHS curriculum.

2006: A video conferencing system was implemented for DHS enterprise making this a viable methodology for training. Use has continue to increase since installation.

2007: Cherry Avenue Training Facility was completed and is the Salem based classroom facility for all Divisions; co-housing CAF and ASD eLearning staff.

2007: A learning management system was implemented by a cross-divisional team, and being used by all employees to locate, register for training and track training history. The LMS is called the “DHS Learning Center” and is located at <https://dhslearn.hr.state.or.us>

2007: Seniors and People With Disabilities Division establish a Training Coordinator position.

2007: Customer service training, a highly rated training need, was designed by cross-department group and deployed as *Creating A Culture of Service*.

2007: *Cultural Competency & Diversity at DHS: Embracing, Valuing and Implementing* – deployed required training course for all current DHS employees, and is now required for all new employees.

2008: Children, Adults & Families establishes a Self-Sufficiency Training Unit.

2008: *Online: DHS Core Values* was launched through the DHS Learning Center and provides a self-paced elearning module for required of all employees to take.

2008: *Interview Panelist* training course was designed by cross-department group with HR and offered through DHS Learning Center. Also, available for use in preparing strategic recruitments within Divisions.

2008: DHS Training Standards were adopted by DHS Employee Training Council.

2009: Training need resolved: Writing skills, a highly rated training need, is being met through new web page with training resources related to writing skills. Managers may now connect employee to a resource that is aligned with employee's specific needs.

2009: Professional development for distance learning resources in Divisions through providing training, user groups, and online resource center.

2009: In the Plan document, replaced the term “cluster” with division.