Improve Training Initiatives – Develop and Implement Field Training Guide

Sandra R. Farray, MA

SC Vocational Rehabilitation Department

January 22, 2015
Introduction

The South Carolina Vocational Rehabilitation Department’s mission is “Preparing and assisting eligible South Carolinians with disabilities to achieve and maintain competitive employment.” We are partially regulated by the Department of Education’s Special Education & Rehabilitative Services Administration (RSA). RSA administers and supports a comprehensive array of formula and discretionary grant programs and projects that serve and assist individuals with disabilities. (http://www2.ed.gov/about/offices/list/osers/rsa/programs.html).

The South Carolina Vocational Rehabilitation Department (SCVRD) serves citizens within all counties of South Carolina. Our 20 area offices and 24 work training centers serve as points of entry for clients, vendors, and business partners. We work with people with physical and/or mental disabilities who want to go to work, and for whom the disability presents an impediment to getting or keeping competitive employment. Part of the rehabilitation process and service delivery includes rendering a vocational assessment (Appendix A). The purpose of this research project is to evaluate the current process for training field staff, then determine and implement a way to improve the caliber of training.

Problem Statement

Much of what we do at SCVRD centers around training – training clients to get competitive employment, as well as training staff to continuously deliver quality services to clients. The Agency’s management realized that customer satisfaction, client complaints, as well as quality assurance case audits indicated that bolstering the professional development of staff would be a benefit.
Field training efforts in the Vocational Assessment Program have not been successful in terms of the time, effort, and the results of the training. The field staff remain encumbered, confused, and error-heavy, which negatively impacts the level of service that they deliver to our clients. According to an Information Technology Analyst, there continues to be a disproportionately large number of “help desk” requests regarding the Vocational Assessment Program since May 1, 2011. Still, there remains misinformation, misuse, and IT errors in the program. (Appendix E)

It is our intent to train staff in the professional administration of their core duties, as well as provide regular training in the technological systems that support them in their work. Rather than merely doing more of what we have always done, the decision was made to take a more directed approach to training staff that would enhance the skills of the subject matter experts (SME), and strengthen methodologies typically used. Failing to improve service and failing to meet Agency goals could jeopardize our ability to continue serving people with disabilities at optimal levels.

Therefore, this project was chosen to have a positive impact upon the development of staff, and ultimately the quality of service delivery to clients. This aligns with the Agency’s standards of excellence, which includes “quality client services provided in an atmosphere of trust, sincerity and commitment.”
Data Collection

When SCVRD has an initiative in which to train the field staff, it is called a field “roll-out”. The initiative could be a new policy, procedure, core duties change, technology, etc. Sometimes there are changes that are administrative in nature or “back room” initiatives that are invisible to the field staff. However, whenever a change affects field staff in how they process their work, in the decisions that they make, and/or how they deliver services to clients, there will be a state-wide training or “roll out” for the desired change with the appropriate staff roles.

In order to design a response to the Vocational Assessment Program roll-out deficiencies, I first had to gather data about the planning, process, delivery and results. I gathered qualitative data via interviews with primary stakeholders. There was limited quantifiable data available, such as an evaluation. Therefore individual interviews were conducted with those persons who were intricately involved in the development and roll-out of this program to gather data. The interviewees’ roles were:

1. Assistant Commissioner of Client Services
2. Client Services Specialist – State Office Resource SME
3. Director of Quality Assurance (case audit)
4. Business Analyst/Programmer – Information Technology
5. Area Client Services Manager – Pilot Field Office
6. Vocational Assessment and Career Exploration Specialist (2) – field offices
7. Vocational Assessment and Career Exploration Specialist – State Office Resource SME

Each person was asked the following ten questions:

1. How many Client Services roll-outs have you directly or indirectly been involved in?
   a. Note: This question was asked to determine the amount of experience the individual had with these types of roll-outs. This helps to understand the interviewee’s span of experience as well as put their comparative analysis in context.
2. How many people were involved in the Vocational Assessment Program roll-out?

3. Rate the Vocational Assessment roll-out to previous ones. Use the categories: "more successful; same as others; less successful.
   a. Note: 62.5% rated it "less successful"

4. Stakeholders are people who have interest in, and/or are affected by this initiative. Who were the stakeholders?
   a. Note: This question allowed me to determine the scope of upstream and downstream impact on the field office and the Agency as a whole.

5. What was the overall objective of the Vocational Assessment change?

6. What was the process? Describe the steps.

7. What was the timeline from the inception to the final roll-out?
   a. Note: All respondents stated between 12 – 18 months to roll out to all of the field offices

8. What was the outcome of the Vocational Assessment roll-out?

9. Rate the following statements from "strongly disagree" to "strongly agree"
   a. The roll-out was well planned
   b. Webinars successfully helped staff learn
   c. Materials helped staff to learn
   d. This was a successful implementation
   e. This should be a model for other roll-outs

10. What else should I know about the Vocational Assessment roll-out?

    Based upon that data, and after review with management for further insight, I then developed a Field Training Guide (Appendix D) to suggest a protocol that would include best practices in training and development. This Field Training Guide would include the use of the Training
Design and Performance Evaluation Template (Appendix B) utilizing various methods (Appendix C) and involve key personnel to ensure improved results.

The Field Training Guide was applied to the next training roll-out, after which stakeholders were asked to give feedback as a post-assessment of the roll-out.

Data Analysis

One of the key findings from the data from the stakeholder interviews about the Vocational Assessment Program roll-out revealed that there were many assumptions made that were subsequently proven false. For instance, it was assumed that field staff would easily make the transition from performing a vocational assessment on paper to doing the assessment in a computer program. One of the causes for this assumption could be attributed to the lack of a proper needs assessment to discover exactly what needed to be learned by staff and supported by technology. Unfortunately, it was discovered that best practices for vocational assessment needed to be re-visited to cover fundamentals of that service, and not just the process of using a computer program. Additionally, all of the respondents reported that the roll-out was “rushed”. They expressed a sense of not being fully prepared before the roll-out “go live” date. Typical comments included: “Maybe we should have tried it out on more sites for feedback. We need to take more time to listen to what people really need. We don’t need to rush the process.” Another comment stated: “System development appeared rushed, maybe due to the reduced programming staff.”
So, while the pre-determined deadline was met, the product and results did not meet expectations. This was a valuable lesson learned in terms of respecting the timeframes and allowing flexibility to expand the project timeframe when necessary.

Another key finding was the overwhelming response that this was not a successful implementation and should not be a model for other roll-outs. In addition to the narratives, I attempted to quantify the perceptions of the respondents. Respondents rated the following statements from “strongly disagree” to “strongly agree”.

The results were as follows:

<table>
<thead>
<tr>
<th>Statement</th>
<th>% SD</th>
<th>% D</th>
<th>% N</th>
<th>% A</th>
<th>% SA</th>
</tr>
</thead>
<tbody>
<tr>
<td>The roll-out was well planned</td>
<td>12.5</td>
<td>62.5</td>
<td>12.5</td>
<td>12.5</td>
<td></td>
</tr>
<tr>
<td>Webinars successfully helped them learn</td>
<td>25</td>
<td>75</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Material helped staff to learn</td>
<td>37.5</td>
<td>12.5</td>
<td>37.5</td>
<td>12.5</td>
<td></td>
</tr>
<tr>
<td>This was a successful implementation</td>
<td>12.5</td>
<td>75</td>
<td></td>
<td>12.5</td>
<td></td>
</tr>
<tr>
<td>This should be a model for other roll-outs</td>
<td>87.5</td>
<td>12.5</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Overwhelmingly, the respondents would consider the roll out of the Vocational Assessment as failing to meet expectations. The question about the webinar was confusing because there was only one webinar with limited participation, so there was no clear assessment of whether or not this was helpful.

Implementation

After a client receives a vocational assessment, the client and the counselor will meet and map out the Individual Plan for Employment (IPE) (see Appendix A). The IPE is a crucial interaction that will consider all data received about the client, such as the application, medical records, disabilities, functional limitations, vocational objective, etc. The client and the counselor work on the kinds of particular SCVRD services that can assist the client manage the disability, mitigate the limitations, and go to work. The Information Technology unit and the
Client Services unit worked on automating this process for approximately 18 months. It has been beta tested, (October, 2014) revised, and has withstood various levels of quality measures. The IPE Program was then ready for field roll-out. We anticipated that it would take 60 days to complete this roll-out.

**Action Steps:**

I had several meetings with the Client Services Specialist SME; the Director of Client Services; the Director of Information Technology; the IT Business Analyst; and various other state office personnel who have been involved with the development of this IPE Program to determine the roll-out. We then implemented the Field Training Guide, as outlined in Appendix D. The Guide recommends mandatory webinars for an overview of the initiative (Appendix D item F). Unlike previous roll-outs, we ensured that all counselors received the same “big picture” overview and had an opportunity to see the Program in action, ask questions, and prepare for the upcoming face-to-face training. A memo from the Assistant Commissioner of Client Services was sent to all Area Office Supervisors and Area Client Services Managers, which outlined the plan for training and the necessary steps for them to take to ensure all staff was prepared. Communication was thorough and often. Reminders were sent and updates were emailed to keep the field leaders abreast of this initiative.

The webinars were held on several dates for state-wide participation. Sign-in sheets were submitted as evidence of this pre-requisite. Materials were developed based upon actual cases for realistic demonstrations. Then, between 11/12/14 and 11/20/14, key trainers from each area office received detailed training with actual client data from their own caseloads in a classroom setting at the State Office. These train-the-trainer sessions served to provide state-office trained expertise within each field office. These field trainers then had 2 weeks within which to train the
remaining counselors in their respective offices. We often bring field staff into the State Office for training in various topics. This could have been a conflict in schedules, and caused undue hardship for staff to manage client needs. Therefore, there was an unprecedented management decision to cancel all other training during November, when staff would be participating in the IPE Program training. This “black out” for training within the Agency removed a significant barrier to success.

The “go live” date for the new IPE Program was 12/8/2014. As of that date, only the new IPE Program would be available for use and previous platforms would be discontinued. The same group was asked to assess the IPE Roll out with the same questions used in the assessment of the Vocational Assessment roll out.

**Evaluation**

The results were summarized as follows:

<table>
<thead>
<tr>
<th></th>
<th>% SD</th>
<th>% D</th>
<th>% N</th>
<th>% A</th>
<th>% SA</th>
</tr>
</thead>
<tbody>
<tr>
<td>The IPE roll-out was well planned</td>
<td>0%</td>
<td>0%</td>
<td>12.5%</td>
<td>37.5%</td>
<td>50%</td>
</tr>
<tr>
<td>Webinars successfully helped them learn</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>37.5%</td>
<td>62.5%</td>
</tr>
<tr>
<td>Material helped staff to learn</td>
<td>0%</td>
<td>0%</td>
<td>12.5%</td>
<td>50%</td>
<td>37.5%</td>
</tr>
<tr>
<td>This IPE roll out was a successful implementation</td>
<td>0%</td>
<td>0%</td>
<td>12.5%</td>
<td>37.5%</td>
<td>50%</td>
</tr>
<tr>
<td>This IPE roll out should be a model for other roll-outs</td>
<td>0%</td>
<td>0%</td>
<td>25%</td>
<td>25%</td>
<td>50%</td>
</tr>
</tbody>
</table>

Clearly, the use of the roll out protocol made a significant difference in the success of this program according to the key stakeholders who developed and implemented it.

The webinars were attended by all staff state-wide, who were affected by this change. They were not surveyed, however, there was a SurveyMonkey electronic evaluation sent to all of the participants of the face-to-face training, to evaluate the roll out. This group consisted of
representatives from every field office, who participated in the “train the trainer” sessions, as well as the webinars. The results are graphed in Appendix G.

Summary and Recommendations

The Individual Plan for Employment (IPE) changes were successfully taught (rolled out) to field staff, such that they can perform the duty with efficiencies that were not in place prior to the roll out of this initiative. We have found an overwhelming satisfaction with the ease of use for the program, and the significantly low amount of calls to the I.T. Help Desk with questions. That was another indicator that the roll out was indeed a success. Our field staffs have received the professional development that they required, without the confusion, loss of time and resources, negative impact upon service delivery, etc. that had been previously experienced with the Vocational Assessment roll out.

It was recommended to the Assistant Commissioner of Client Services that the Roll Out Protocol used in this project be adapted as the standard for future client services initiatives. It has been established now as the standard that will be followed for future success.
Appendix A
Appendix B

**Training Design and Performance Evaluation Template**
Adapted from: [http://www.nwlink.com/~donclark/hrd/ADDIE/ADDIE_backwards_planning_mode1.html](http://www.nwlink.com/~donclark/hrd/ADDIE/ADDIE_backwards_planning_mode1.html)

<table>
<thead>
<tr>
<th>Submission Date</th>
<th>Training Date(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/01/2014</td>
<td>10/6/14 Camden office beta site</td>
</tr>
<tr>
<td></td>
<td>11/3; 11/7; 11/10; webinars</td>
</tr>
<tr>
<td></td>
<td>11/12-13/2014</td>
</tr>
<tr>
<td></td>
<td>11/19-20/2014</td>
</tr>
<tr>
<td></td>
<td>Webinar Q&amp;A to 12/18/14</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Training Title</th>
<th>Target Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>New CMS – IPE Program</td>
<td>All counselors; ACSMs; QA staff;</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact Person</th>
<th>Contact Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Cato</td>
<td>6-6578</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Person(s) Developing Training</th>
<th>Length of Training: 2 hr webinars; full day classroom</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.Cato, S. Farray</td>
<td></td>
</tr>
</tbody>
</table>

**Agency Needs (strategies & goals)** → **Results (goals, numbers, success indicators)** ← **What is our objective? (what will learners be able to do?)**

**Job Performance Needs (identify what stops unit from success)** → **Behavior (capability to perform tasks)** ← **What do the performers need to do to reach objective?**

**Training Needs (what needs to be learned)** → **Learning (new knowledge)** ← **What activities or experiences will help them to learn?**

**Individual Needs (motivation in place)** → **Reaction (reactions to the learning process)** ← **What will motivate them to learn and perform? (influence toward goals)**

**Briefly list the needs:**
**Agency Needs - How does this address Agency strategies/goals?**
Agency standard of excellence to render quality client services provided in an atmosphere of trust, sincerity and commitment; professional development of staff; quality continuous process improvement will be supported by this initiative.
Job Performance Needs - What stops the staff from success?: Currently counselors struggle with individual plans for employment, and this computer program is a tool to assist them serve the client in a more comprehensive manner.

Training Needs - What needs to be learned?: Crucial elements of the IPE; how to navigate the new program; best practices in IPE development

Individual Needs - What will motivate the learners to be successful in training?: This new system will enhance the accuracy of current IPEs; allow the counselor to use time with the client more efficiently; reduce rejections submitted to quality assurance; reduce paperwork; and generally allow the counselor to develop the relationship with the client without the processes becoming a barrier. Counselors will “work smarter, not harder”.

Learning Objective(s) - What will learners be able to do?: At the end of this training, after participating in the IPE Overview, and the face-to-face training, staff will be able to:
1. Complete a draft IPE in preparation for the counseling & guidance session
2. Identify functional limitations and appropriate services for each
3. Amend an IPE

Performance Test - What do learners need to DO in class in order to reach the objective(s) - What behaviors will be seen?: Each learner will attend the class with 3-4 of their actual caseload cases. After learning critical elements, they will then demonstrate the use of each element by creating a draft IPE for each of their clients. The trainers and co-facilitators will verify accuracy.

Activities/Procedures to Master Performance - What activities/experiences will you include in the training to help them learn?: Instruction from the Subject Matter Expert; then practical application on the computers in the classroom. Print and share their work.

Has permission been granted for course material to be uploaded onto LOTIS? Yes or No N/A

If no, how will new employees obtain this information?: This will be posted on the LMS – LOTIS for future online training.

List additional resources for new employees: handouts of presentation; feedback from the ACSM and the SME

Disability Accommodation - How have you amended the activities to ensure accessibility?: Versions will be adapted for screen readers once posted on LOTIS.
Motivation Techniques – What will motivate them to learn and perform?: (i.e. creating a safe learning environment; practice in session; handouts, etc. – What helps you to learn in training?)
Counselors will use this tool to make their jobs easier, with less errors and therefore, more successful outcomes. They will more efficiently reach their goals.

EVALUATIONS – IMPACT ON PERFORMANCE

LEVEL 1 – Reaction to the training – Attach – or submit survey questions re: the session 30 days prior to training date (based on Learning Objectives and reaction to training; content; presenters, etc.)
Survey Questions Attached: yes or no
HRD should email results of Level 1 Survey to (name/s): L. Lieser; A. Cato; S. Farray; N. Ostrander; M. Johnson

LEVEL 2 – Item Analysis –
(A) What are the tests/observations of specific skills during training? Completion of the draft IPE without assistance from instructors
(B) What are the next steps (assignment)? Train additional counselors within their respective field offices within 2 weeks of receiving the training themselves.

LEVEL 3 – Performance – (How will performance of these skills be evaluated in the working environment?)
Quality Assurance will monitor the number of rejections/errors re: IPE development
IT will monitor the number of Help Desk requests re: IPE usage

LEVEL 4 – Impact on Performance – (What data, results, success indicators, statistics, etc. will you gather that will give evidence of the impact that this training has had on work performance?)
• Check which interval below that you expect to have evidence of impact – include date & expected results.
• You must gather the data for that interval – i.e. reports; questionnaires; etc.
• You will then submit an Impact on Performance report to HRD with your data

All offices are effectively using new IPE
xx 6 months date: 06/30/15 results: Survey all offices re: effectively using IPE
☐ 9 months date: results:
☐ 12 months date: results:
Appendix C

Methods of Delivery

How do I decide what method will be best to deliver my training?
The following options are recommended in order of consideration:

➢ **Teleconference**: Teleconferencing is an extended, multi-participant phone conversation. Following simple dialing instructions, the facilitator dials up the participants. Everyone is connected by speaker function, and everyone interacts. Despite the potential of using this with large numbers, teleconferencing works best with small groups. It’s ideal for specialized teams who are familiar with the topic at hand and need to confer about planning, problems, and next steps (project management and focus group feedback are examples). Teleconferencing is also the least technically complicated (and least expensive) method of connecting people for training.

➢ **Teleconference with Visual Aids**: Teleconferencing may also include visual aids. Information may be sent to participants prior to the conference (at least 3 days) in the form of handouts or PowerPoint presentations. This works well when documents need to be shared and assists in the facilitation of the training.

➢ **Webinar (web seminar)**: Webinars are online sessions that allow participants to gather virtually; each at a personal computer. Just like face-to-face training, webinars should be engaging and meaningful. The participants can see the slides and other information on the instructor’s monitor, hear the information, and can also interact with the material. This method requires pre-planning and assistance from HRDC. Refer to the [SCVRD Webinar Event Checklist](#) for specific details on planning and conducting a webinar.

➢ **Videoconference**: Videoconferencing is the ideal option when visual contact is important, but participants are not at the primary training site. This type of training is recommended when information needs to reach a large number of staff throughout the state, and interaction is minimal. It is recommended for groups of three or more and where trainings last no longer than two hours. Materials need to be sent to the sites and received, at least one week in advance of the training. Videoconferencing also requires the assistance of the HRDC’s technical staff member to operate the system.

➢ **Videoconference with Facilitators**: This method of videoconferencing is the same as above, but requires an additional staff person to serve as facilitator at each site. It’s possible with this method to conduct a remote training, but includes options for interaction and group activities.

➢ **On-Site/face to face**: Some training occasions are events. They deal with broad topics and require interaction with speakers and other participants. This method may be used for small or large (up to 70) numbers of participants. Attendees also have the added benefit of withdrawing from their usual surroundings, listening without distractions, and interaction with participants statewide. Such sessions call for the full resources of the HRDC and are
most beneficial when conducting trainings that involve detailed presentations and group work.

The following information is provided to assist you in deciding the best method of presentation for your training session.

Teleconferencing is recommended if:
- Size of group is 1-15 and interaction is relevant. May connect up to 99 participants
- Goal is to impart or share verbal information
- Meeting or training is no longer than 1½ hours

Teleconferencing with Visual Aids (PowerPoint, handouts-sent to participants prior to training) is recommended if:
- Size of group is 1-15 and interaction is relevant. May connect up to 99 participants
- Goal is to impart or share information
- Visuals are needed to assist in the sharing of information
- Meeting or training is no longer than 1½ hours

Webinars
- Mini webinars 5-10 people - conversational, brainstorming
- Small webinars 10-25 people - limited discussion, use voting tools
- Medium webinars 25-50 people - facilitation is essential
- Large webinars 50-150 people - can run chat forum for comments and questions
- Very large webinars >150 people - very structured, panel/lecture, frequent polls

Videoconferencing is recommended if:
- Size of group may range from 10-40+
- Participants are throughout the State
- Duration of training is 2 hours or less
- Interaction is minimal
- The goal is to impart information

Videoconferencing with Facilitators onsite is recommended if:
- Size of group is 10-40+
- Participants are throughout the State
- Duration of training is less than a day with facilitated activities
- Interaction is encouraged
- Group work is planned

Onsite/Face to Face Training is recommended if:
- Size of group is from 1-70
- Interaction is needed
- Group work is planned
- Technical information requiring visuals is planned
• Meeting or training lasts from 1-3 days

**Videoconferencing Considerations**

If a Videoconferencing format is chosen, the next decision involves choosing the number and location of the sites. The HRDC system will accommodate 1 site to 24 sites. If interaction and or group work is planned, we recommend having no more than 8 sites. If minimal interaction is needed, the number of sites may be increased.

For your convenience, a listing of sites is included within this packet. Once you decide on the videoconferencing format, please contact the HRDC and we will assist you in making the final decision on the number and location of sites. We will also notify each site coordinator to ensure the reservation of the videoconferencing location.

**Remember:** If you are videoconferencing and have supporting documents you want to share with the remote sites, you are responsible for sending these documents to the participants at least one week prior to the training date. A copy should also be forwarded to the HRDC.
### Outline of Field Training Guide

**Client Services Initiatives (Programs and Procedures)**

**IPE Roll Out – Protocol and Implementation**

<table>
<thead>
<tr>
<th>A) Subject Matter Expert (SME), with the assistance of the Client Services Training Specialist (CSTS) will complete the Training Design and Performance Template that defines:</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Agency and Staff needs for the field training</td>
</tr>
<tr>
<td>b) Learning Objectives – results expected</td>
</tr>
<tr>
<td>c) Modality – webinar; e-learning; videoconference; Face-to-Face</td>
</tr>
<tr>
<td>d) Materials – resources; any pre-work for field staff</td>
</tr>
<tr>
<td>e) Activities during the training</td>
</tr>
<tr>
<td>f) Technical (computer) support required</td>
</tr>
<tr>
<td>g) Survey questions for Level 1 Evaluation of training</td>
</tr>
<tr>
<td>h) Training team</td>
</tr>
<tr>
<td>i) Develop “next steps” follow up document for full implementation of the initiative (if applicable)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Completed – (see appendix B)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Included in design</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>B) SME develops materials and reviews with CSTS; SME refines all drafts</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Facilitator Guide</td>
</tr>
<tr>
<td>b) Handout materials</td>
</tr>
<tr>
<td>c) PowerPoint</td>
</tr>
<tr>
<td>d) Agenda</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Done</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A – notes on PPT</td>
</tr>
<tr>
<td>Diagrams on intranet for staff</td>
</tr>
<tr>
<td>On intranet for staff review</td>
</tr>
<tr>
<td>Handout</td>
</tr>
</tbody>
</table>

| C) SME posts all training material on the Client Services shared drive; orders all printed material; requests copies of handouts |
| D) CSTS submits package for necessary approvals |

<table>
<thead>
<tr>
<th>Done</th>
</tr>
</thead>
<tbody>
<tr>
<td>Done</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>---</td>
</tr>
<tr>
<td><strong>a)</strong> Assistant Commissioner of Client Services</td>
</tr>
<tr>
<td><strong>b)</strong> Committee on Rehabilitation Excellence (CORE) if necessary</td>
</tr>
<tr>
<td><strong>c)</strong> Commissioner (if necessary)</td>
</tr>
<tr>
<td><strong>E)</strong> CSTS coordinates logistics</td>
</tr>
<tr>
<td>a) Request sequencing recommendations from Area Development Directors (ADD)</td>
</tr>
<tr>
<td>b) Set Roll-out schedule – approved by Assistant Commissioner of Client Services</td>
</tr>
<tr>
<td>c) Communicate schedule and any preparation required to Area Supervisors; ADDs; Senior Staff</td>
</tr>
<tr>
<td>d) Advise training team members (if applicable); arrange vehicles; etc.</td>
</tr>
<tr>
<td><strong>F)</strong> Develop and schedule mandatory webinars for overview</td>
</tr>
<tr>
<td><strong>G)</strong> SME and CSTS co-facilitate field office training</td>
</tr>
<tr>
<td>a) Minimum of 5 of 25 offices co-facilitated</td>
</tr>
<tr>
<td>b) Debrief for any content changes; answer and list FAQs; etc.</td>
</tr>
<tr>
<td><strong>H)</strong> Team rollout roles</td>
</tr>
<tr>
<td>a) CSTS will be lead facilitator of training event</td>
</tr>
<tr>
<td>b) SME will be responsible for caliber and validity of content</td>
</tr>
<tr>
<td>c) IT member (if any) will handle all technological issues and set up</td>
</tr>
<tr>
<td><strong>I)</strong> Roll out follow up (next steps)</td>
</tr>
<tr>
<td>a) SME and CSTS will develop the Post-training next steps in support of implementation and for systematic accountability</td>
</tr>
<tr>
<td>b) CSTS will electronically gather follow up forms; i) create summary</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>---</td>
</tr>
<tr>
<td>ii)</td>
</tr>
<tr>
<td>iii)</td>
</tr>
<tr>
<td>c)</td>
</tr>
<tr>
<td>d)</td>
</tr>
</tbody>
</table>
Sandra,

I have compiled the following data for help desk requests submitted for program CCPT370 (Vocational Assessment).

- 361 - number of help desk requests with issues related to program CCPT370
- 21,900 - as of 10/20/2014, this is the number of help desk requests submitted since 05/01/2011 (estimated date of production for VA).

Not sure if this is enough to paint an accurate picture for the issues we have had. However, a large majority of these requests were submitted for several months after the program went into production.

Thanks,

[Redacted Name]
Client Services Applications Analyst
SCVRD IT Department
(803) 896 [Redacted]
TITLE OF EVENT: - CMS – IPE Program Training
DATE OF EVENT: - 11/12; 11/13; 11/19; or 11/20
PRESENTER: Ali Cato
(scale from strongly agree to strongly disagree – except the comments should be fields for narrative)

Part 1: WEBINAR – Overview of new IPE Program
1. I better understand the “big picture” of why we are moving to the new program
2. The PowerPoint review was a helpful introduction
3. The demonstration of the IPE was clear and concise
4. The webinar better prepared me for the face-to-face training
5. The presenter communicated the content clearly
6. Comments

Part 2: Classroom training – IPE Program
1. The IPE instruction demonstrated the steps clearly
2. The class helped me understand how to use the program
3. Using my cases helped me create a draft IPE
4. This training met the learning objectives
5. The presenter communicated the content clearly
6. Comments

Part 3: OVERALL ASSESSMENT
1. This class met my needs and expectations
2. This class was useful to my job
3. The activities were practical and useful
4. The materials were useful and helped me learn
5. OVERALL COMMENTS
Appendix G – IPE Roll Out Results

I better understand the “big picture” of why we are moving to the new program

The PowerPoint review was a helpful introduction
Appendix G - IPE Roll Out Results

The demonstration of the IPE was clear and concise

The webinar better prepared me for the face-to-face training
Appendix G – IPE Roll Out Results

The presenter communicated the content clearly

The IPE instruction demonstrated the steps clearly
Appendix G – IPE Roll Out Results

The class helped me understand how to use the program

Using my cases helped me create a draft IPE
Appendix G – IPE Roll Out Results

This training met the learning objectives

The presenter communicated the content clearly
Appendix G – IPE Roll Out Results

This class met my needs and expectations

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

This class was useful to my job

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree
Appendix G – IPE Roll Out Results

The activities were practical and useful

The materials were useful and helped me learn