



Session 2: Performance Management Business Process

To Be Process Symbol Legend

Customer symbol: indicates an internal or external customer coming to initiate or receive services.

Existing process step box symbol: indicates a step in the business process.

New process step box symbol: indicates a new step in a business process.

Existing process step box symbol: indicates an existing step in a business process that will be eliminated in the future state.

Decision tree symbol: indicates Y / N options or decision in a business process.

Directional arrow: indicates the direction of a process on steps going forward, a dashed line indicates a feedback loop. A Blue arrow indicates an step using workflow automation..

Hardcopy documents: A black doc indicates a system produced document or documents that start out as hardcopy. An "F" in the symbol indicates a fax. A red-lined doc indicates an existing document that will be eliminated in the future state.

A multiple document symbol indicates a packet / package of documents.

Electronic documents/content/files: indicates a system produced document or documents that start out as hardcopy that are scanned and stored electronically. (This could also include future digital photos, digital video, or digital recordings.)

Electronic Form: "E" indicates an electronic form. An "X": in the document symbol indicates a requirement for an E-Signature.

Envelope symbol: indicates mail, internal or external correspondence. An "E: in the envelope indicates email and if blue, indicates auto-notifications or emails.

Existing database symbol: indicates existing software/database, using an commercial off-the-shelf/custom developed application. A red symbol denotes an existing software to be eliminated/replaced.

New database symbol: indicates new software/database, commercial off-the-shelf/custom developed application. The type of system is noted inside or adjacent to the symbol

Vertical file, box, binder and CD-ROM symbols: indicates existing hardcopy file storage, onsite/offsite document archives, or electronic file storage.

Car symbol: indicates the movement of information by car.

Anchor symbol: indicates instance(s) where an external department or organization adversely impedes the effective execution of a business process.

As-Is Narrative Legend

1,4,7 Red Problem Number Keys: visual cues placed next to process steps where problem occurs in the existing business process. The same number can be used more than once for the same problem in several steps in the process.

Problems Problem Statements: problems in the existing process, identifying any obstacle to the effective and efficient execution of a task or service delivery.

Impacts Impact Statement: quantitative or qualitative impact to the effective and efficient execution of an internal business process or service delivery to the customer.

Solutions Solution Statement: possible policy, process, and/or technology solutions.

Benefits Benefits Statement: quantitative/qualitative benefits to the internal/external group, enterprise or customers.

Future State Solutions Legend

Management / Policy These solutions entail new management policies and practices that are required as a result of introducing new information technology solutions and / or business process changes. Common examples include policy statements, organizational change, Change Management, Service Level Agreements, etc.

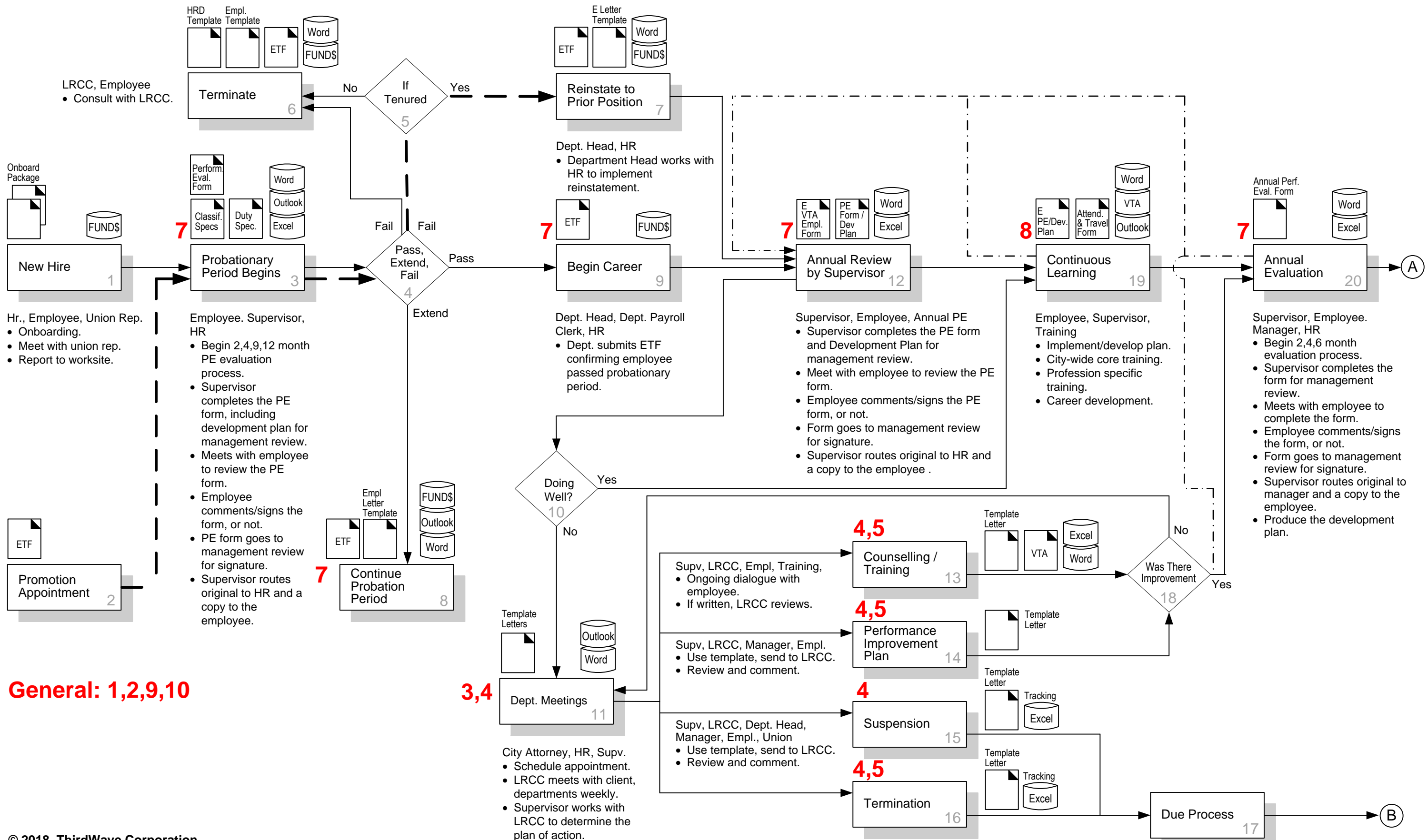
Process / Operational These solutions entail the introduction of new business process steps – or the elimination of existing business process steps, for Business Process Improvement, or as a result of introducing new Information Technology solutions identified in the Rapid Workflow™ workshops. Business Process/ Operational solutions also include business process improvement opportunities identified as part of the Rapid Workflow® business process analysis workshops that do not have any direct relationship to Information Technology.

Information Technology These solutions entail a variety of solutions, including the:

- Introduction of new Information Technologies
- Replacement of existing systems with new technologies
- Enhancement of existing Information Technologies/Systems to compliment new management policies.
- Enhancement of existing Information Technologies as identified in the Rapid Workflow™ workshops as Business Process Improvement opportunities.
- Integration of proposed technologies with existing technologies

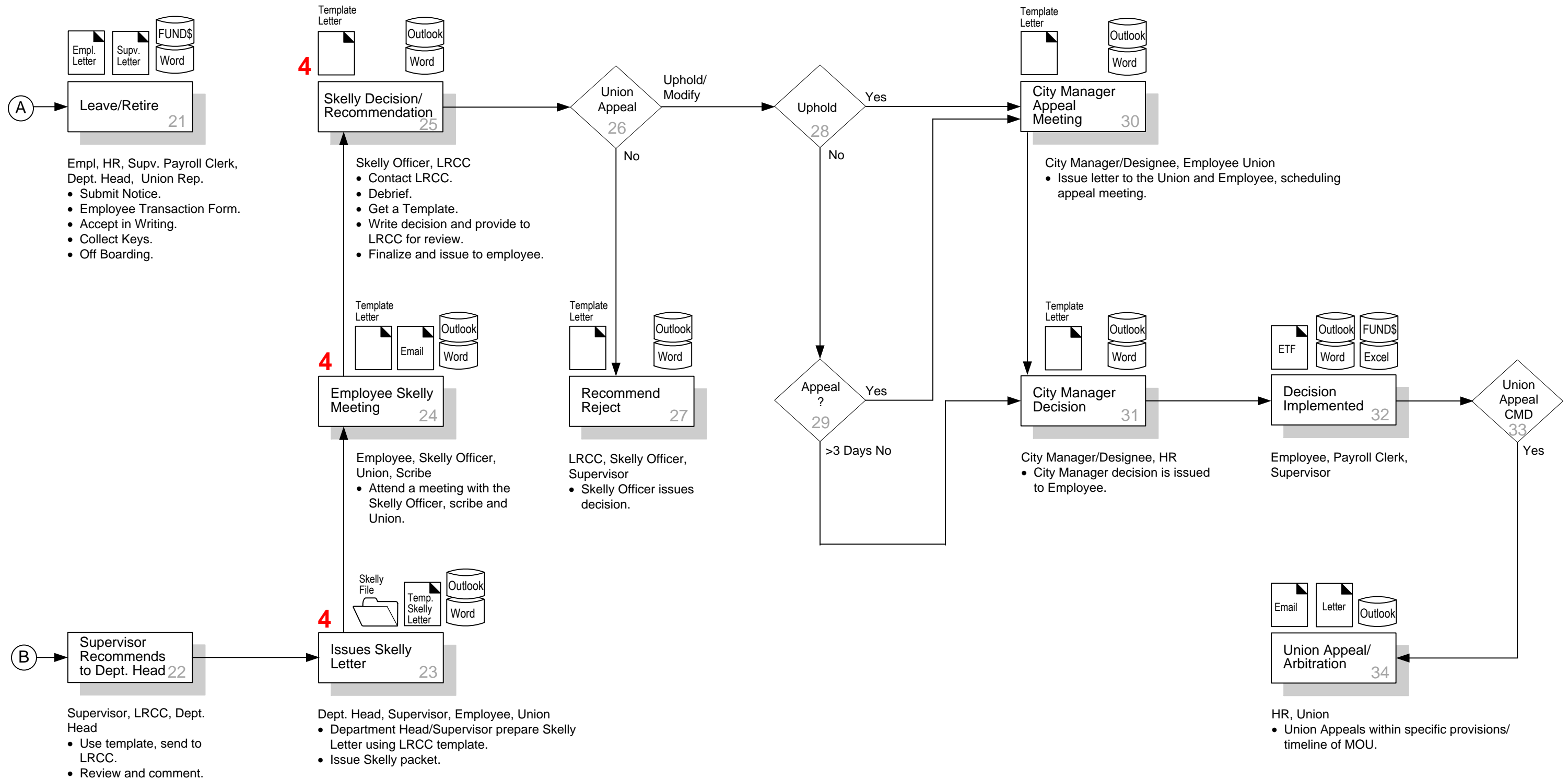


Session 2: Performance Management As-Is Business Process





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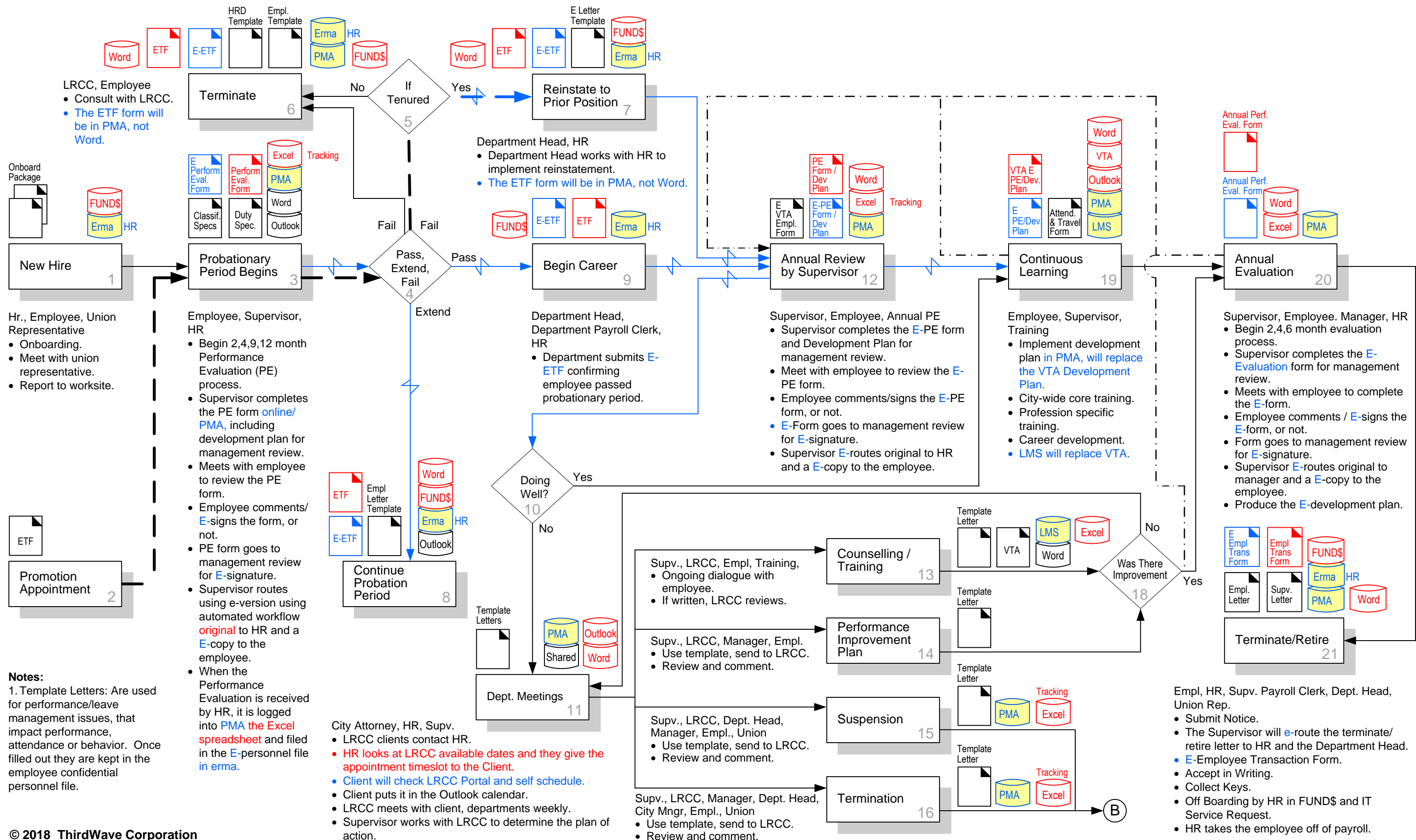


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Problems	Impacts	Solutions	Benefits
<ol style="list-style-type: none"> 1. This is a paper-based process; no central repository of information. 2. Do not have a good workflow to get documents processed, tracked, delivered and signed. 3. Communicating with LRCC, and what they are doing. 4. No tracking from recommendation to implementation. 5. No role-based access to templates for supervisors. 6. Inability to protect/provide security for templates. 7. No notification for certain transactions or when evaluations are due. 8. Do not know what continuous training staff are taking. 9. This is a manual-based process. 10. There is no history. 	<ol style="list-style-type: none"> 1. - Staff time. - Inefficiencies. - Lack of accountability. - Cost (paper, toner, copier). - There is an aversion to doing it. 2. - Same as #1. - Time to find out where an item is. - Things fall through the cracks. - Multiple work on the same things. 3. - Staff time wasted. - Frustration. - Staff do not know what questions to ask. - Impacts morale and productivity. - Managers are overwhelmed with a daunting process. 4. - Same as #2. 5. - Same as #1. 6. - Same as #1. - There is a gap in expectations and resources. 7. - Staff do not get feedback on performance. - Affects workload. 8. - Allot of effort to get staff to get training. - May not know if they are taking the right classes. 9. - Same as #1, 2, 3 and 7. 10. - Inefficiencies. - Duplication of effort. - Inaction. - No accountability. 	<ol style="list-style-type: none"> 1. Implement a Performance Management System <p>Features and Functions</p> <ul style="list-style-type: none"> • Workflow Automation: <ul style="list-style-type: none"> ▪ E-Forms ▪ E-Signatures ▪ Notifications ▪ Escalations ▪ Approvals ▪ Rejections ▪ Check Status: where it is/who has a document ▪ Authority Levels ▪ Reminders ▪ Missed deadline notifications ▪ Performance Management ▪ Provides a Central Database ▪ Tracking • Provide role-based access to various "Templates" • Provide History Logs/Audit Trails <p>Reports</p> <ul style="list-style-type: none"> • Performance evaluation due dates • Performance evaluation that are over-due • Who is in the progressive discipline process stage • Clients who attend LRCC, issues, and recommendations <p>Interfaces</p> <ul style="list-style-type: none"> • LMS (Learning Management System) • erma: (Hours details, HR personnel file) • OnBase or Shared drive where documents are stored 	<ol style="list-style-type: none"> 1. - Improved efficiency. - Increased productivity. - Improved job satisfaction. - Cost savings. 2. - Same as #1. 3. - Shared knowledgebase. 4. - Performance management. 5. - Reduced time lag. - More accessibility. - Can take action immediately. - Performance improvement. - Timely notifications of concern. - Encourage supervisor to act more timely. 6. - Same as #5. 7. - Same as #5. - Timely feedback on performance. 8. - Same as #1. - Not having to wait for information. 9. - Same as #1. - Time savings. 10. - Consistency in applying discipline. - Ensuring actions are taken more timely. - Stop hitting staff with a wet noddle.

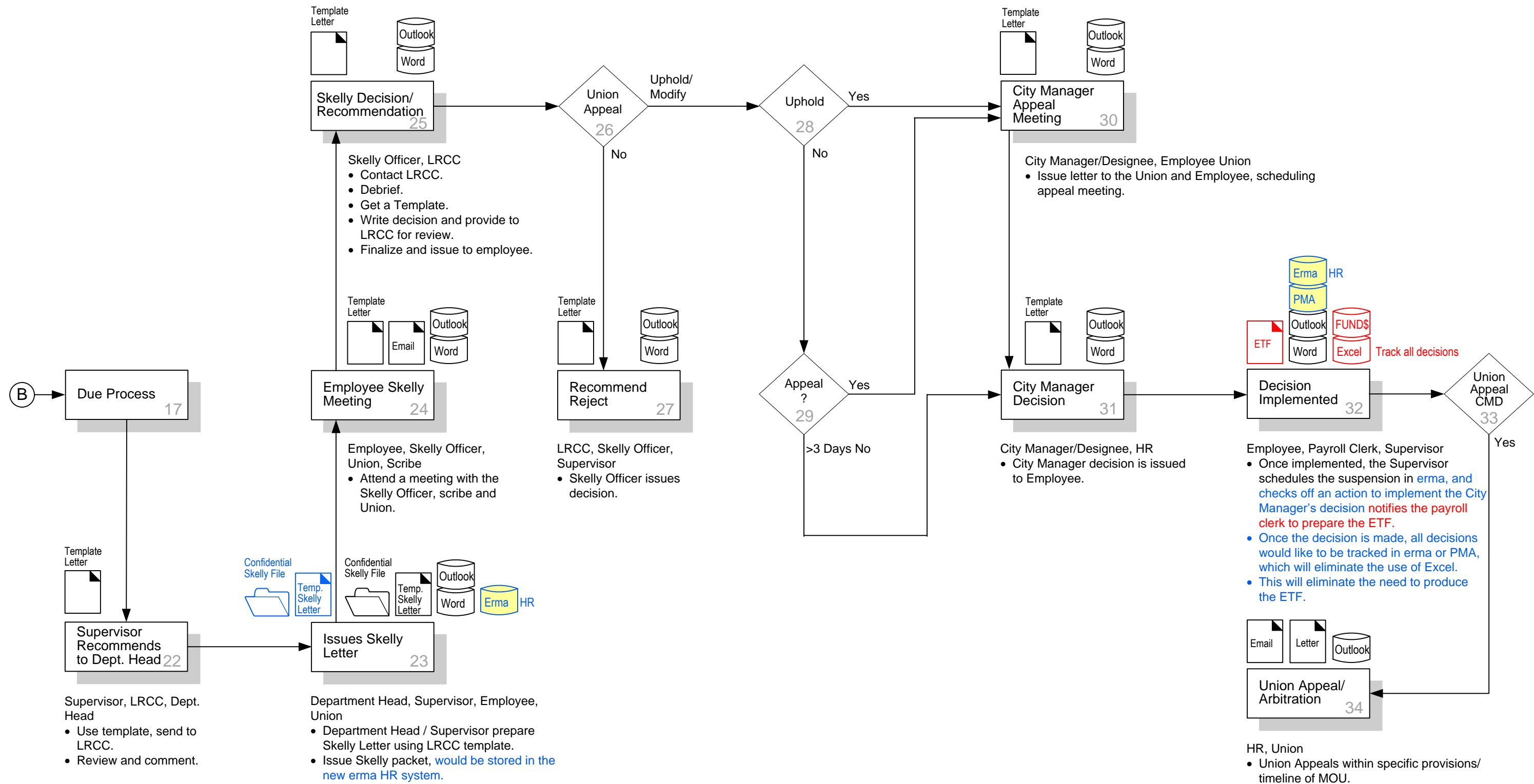


Session 2: Performance Management To-Be Business Process



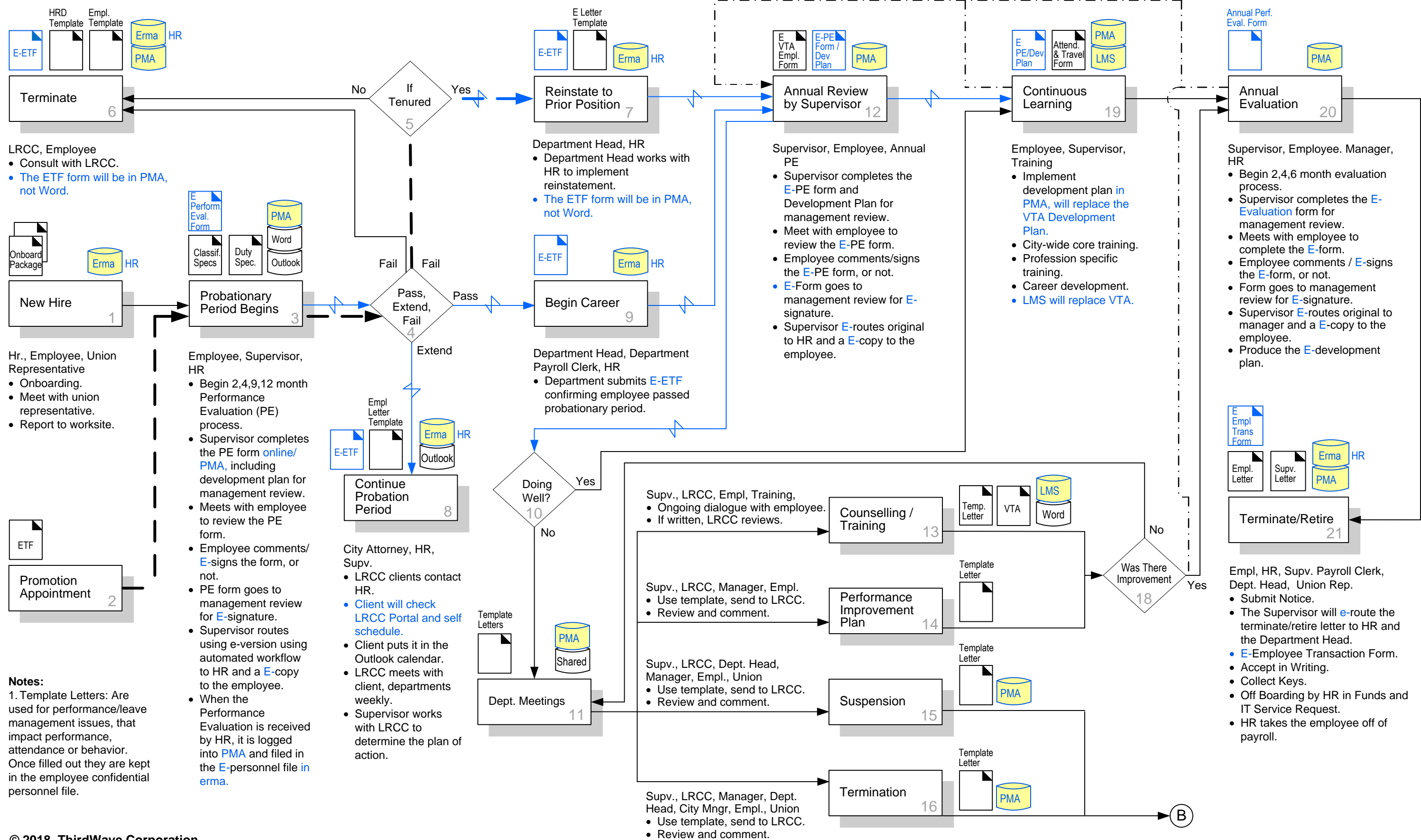


Session 2: Performance Management To-Be Business Process





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LRCC, Employee

- Consult with LRCC.
- The ETF form will be in PMA, not Word.

Hr., Employee, Union Representative

- Onboarding.
- Meet with union representative.
- Report to worksite.

Employee, Supervisor, HR

- Begin 2,4,9,12 month Performance Evaluation (PE) process.
- Supervisor completes the PE form online/PMA, including development plan for management review.
- Meets with employee to review the PE form.
- Employee comments/E-signs the form, or not.
- PE form goes to management review for E-signature.
- Supervisor routes using e-version using automated workflow to HR and a E-copy to the employee.
- When the Performance Evaluation is received by HR, it is logged into PMA and filed in the E-personnel file in erma.

City Attorney, HR, Supv.

- LRCC clients contact HR.
- Client will check LRCC Portal and self schedule.
- Client puts it in the Outlook calendar.
- LRCC meets with client, departments weekly.
- Supervisor works with LRCC to determine the plan of action.

Department Head, HR

- Department Head works with HR to implement reinstatement.
- The ETF form will be in PMA, not Word.

Supervisor, Employee, Annual PE

- Supervisor completes the E-PE form and Development Plan for management review.
- Meet with employee to review the E-PE form.
- Employee comments/signs the E-PE form, or not.
- E-Form goes to management review for E-signature.
- Supervisor E-routes original to HR and a E-copy to the employee.

Employee, Supervisor, Training

- Implement development plan in PMA, will replace the VTA Development Plan.
- City-wide core training.
- Profession specific training.
- Career development.
- LMS will replace VTA.

Supervisor, Employee, Manager, HR

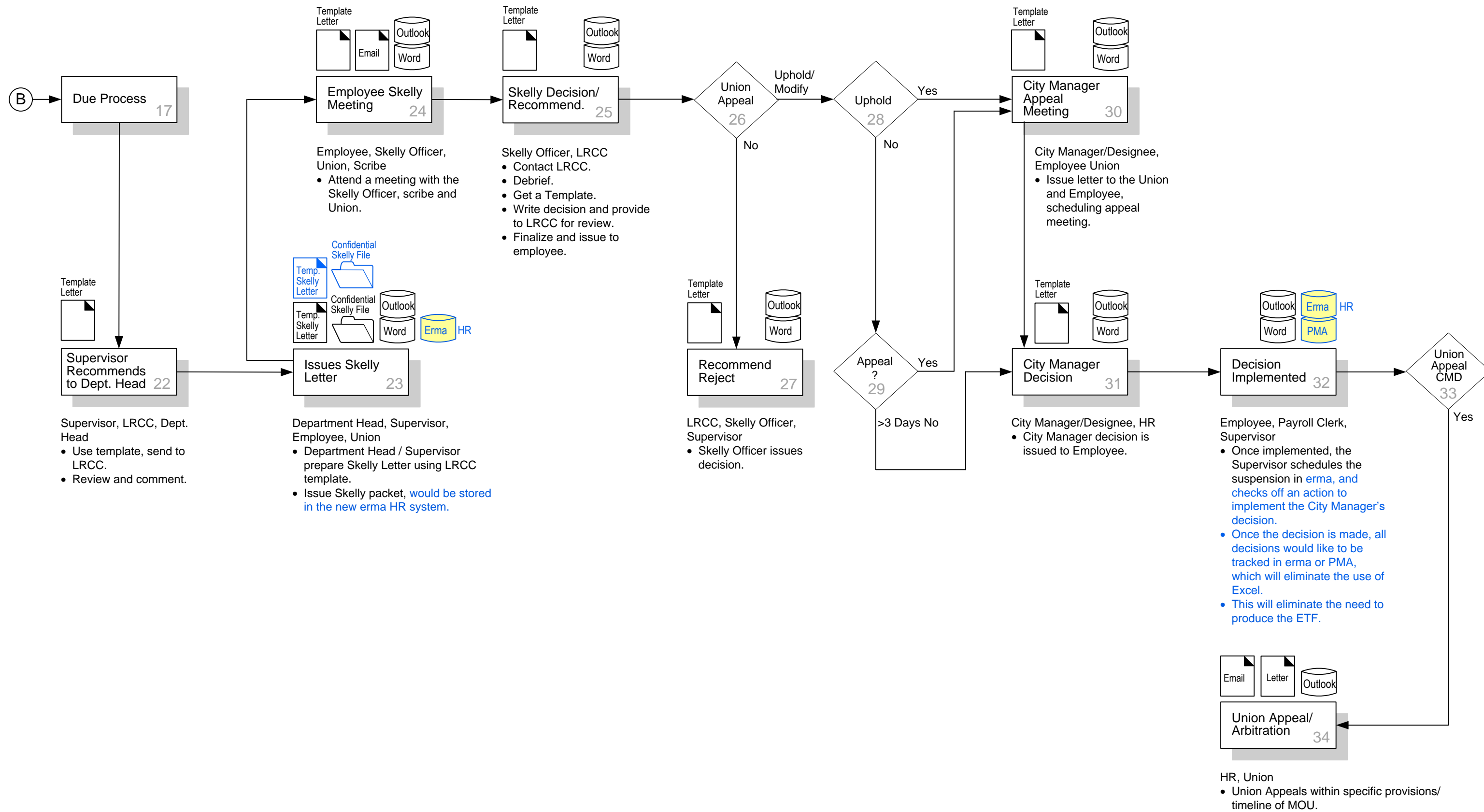
- Begin 2,4,6 month evaluation process.
- Supervisor completes the E-Evaluation form for management review.
- Meets with employee to complete the E-form.
- Employee comments / E-signs the E-form, or not.
- Form goes to management review for E-signature.
- Supervisor E-routes original to manager and a E-copy to the employee.
- Produce the E-development plan.

Notes:

1. Template Letters: Are used for performance/leave management issues, that impact performance, attendance or behavior. Once filled out they are kept in the employee confidential personnel file.



Session 2: Performance Management To-Be Business Process





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Information Technology Solutions

Implement a Performance Management Application (PMA)

Features and Functions

- Weighted Performance Measures.
- Competency Tracking.
- Custom Rating Scales.
- Custom Review Forms.
- Performance Evaluation:
 - Engagement
 - Measurement or performance indicators
 - Review Cycle Tracking
 - Self-Appraisals
- Employee Engagement.
- Appraisal Management.
- Appraisal History Tracking.
- Cascading Goals.
- Development Plans.
- Goal Management.
- Employee Profile.
- Continuous Feedback:
 - Real time feedback
 - Scheduled evaluations
 - Set up accurate job goals
 - 360o Feedback
- Rating Scale.
- Online dashboard for self and team performance metrics.
- Provide role-based access to various "Templates".
- Provide History Logs/Audit Trails.

- Workflow Automation:
 - E-Forms
 - E-Signatures
 - Notifications
 - Escalations
 - Approvals
 - Rejections
 - Check Status: where it is/who has a document
 - Authority Levels
 - Reminders
 - Missed deadline notifications
 - Performance Management
- Provides a Central Database.
 - Tracking.
 - Self Service Portal.
 - Mobile App.
 - iPhone and Android mobile apps.
 - 256-bit encryption for all data.

Reports

Performance evaluation due dates.
 Performance evaluation that are over-due.
 Who is in the progressive discipline process/stage.
 Clients who attend LRCC, issues, and recommendations.

Interfaces

LMS (Learning Management System).
 OnBase or Shared drive where documents are stored.

Business Process / Operational Solutions

- O 1. **Step 1 New Hire:** Replace FUND\$ with new erma HR systems.
- O 2. **Step 3 Probationary Period Begins:** Replace Excel Tracking with new PMA system. Replace hardcopy Performance Evaluation (PE) Forms with electronic Performance Evaluation Forms. Supervisor completes the PE form online/PMA, including development plan for management review. Employee comments/E-signs the form, or not. PE form goes to management review for E-signature. Supervisor will route e-version using automated workflow to HR and a E-copy to the employee. When the Performance Evaluation is received by HR, it is logged into PMA, which will replace the Excel spreadsheet, and filed in the E-personnel file in erma.
- O 3. **Step 6 Terminate:** Replace FUND\$ with new erma HR system. Replace Word with new PMA system. Eliminate hardcopy ETF forms with the electronic ETF forms. The ETF form will be in PMA, not Word.
- O 4. **Step 8 Continue Probation Period:** Replace FUND\$ with new erma HR system. Discontinue using Word. Replace hardcopy ETF forms with electronic ETF forms.
- O 5. **Step 7 Reinstate to Prior Position:** Replace FUND\$ with new erma HR system. Replace Word with new PMA. Eliminate hardcopy ETF forms and produce electronic ETF forms.
- O 6. **Step 9 Begin Career:** Replace FUND\$ with new erma HR system. Eliminate hardcopy ETF forms and produce electronic ETF forms. Department submits E-ETF confirming employee passed probationary period.
- O 7. **Step 12 Annual Review by Supervisor:** Replace Excel Tracking with new PMA software. Discontinue using Word. Eliminate hardcopy PE Form and Development Plan and produce electronic PE Form and electronic Development Plan. Supervisor completes the E-PE form and Development Plan for management review. Meet with employee to review the E-PE form. Employee comments/signs the E-PE form, or not. E-Form goes to management review for E-signature. Supervisor E-routes original to HR and a E-copy to the employee.

- O 8. **Step 19 Continuous Learning:** Replace VTA Development Plan with new PMA systems. Replace VTA with new Learning Management System (LMS). Discontinue using Outlook. Eliminate electronic VTA PE Developmental Plan and produce electronic PE Developmental Plan. Implement development plan in PMA, will replace the VTA Development Plan.
- O 9. **Step 20 Annual Evaluation:** Replace Word and Excel with new PMA systems. Eliminate hardcopy annual performance evaluation forms and produce electronic annual performance evaluation forms.
- O 10. **Step 21 Terminate/Retire:** Replace FUND\$ with new erma HR system. Replace Word with new PMA software. Eliminate hardcopy Employee Transaction forms and produce electronic Employee Transaction forms.
- O 11. **Step 11 Department Meetings:** Replace Outlook and Word software with new PMA systems. Client will check LRCC Portal and self schedule.
- O 12. **Step 13 Counseling/Training:** Replace Excel with new LMS systems.
- O 13. **Step 15 Suspension:** Replace Excel Tracking with new PMA software.
- O 14. **Step 16 Termination:** Replace Excel Tracking with new PMA software.
- O 15. **Step 23 Issues Skelly Letter:** Implement Erma HR software. Produce electronic Temporary Skelly Letter and Confidential Skelly File. Issue Skelly packet, which will be stored in the new erma HR system.

Management / Policy Solutions

- M 1. Performance evaluation process; and the following AR's will need to be revised and updated to accommodate the automated process:
 - Administrative Regulation 2.4 (Medical Leave);
 - Administrative Regulation 2.7, Worker's Comp
 - The Flexible Schedule AR

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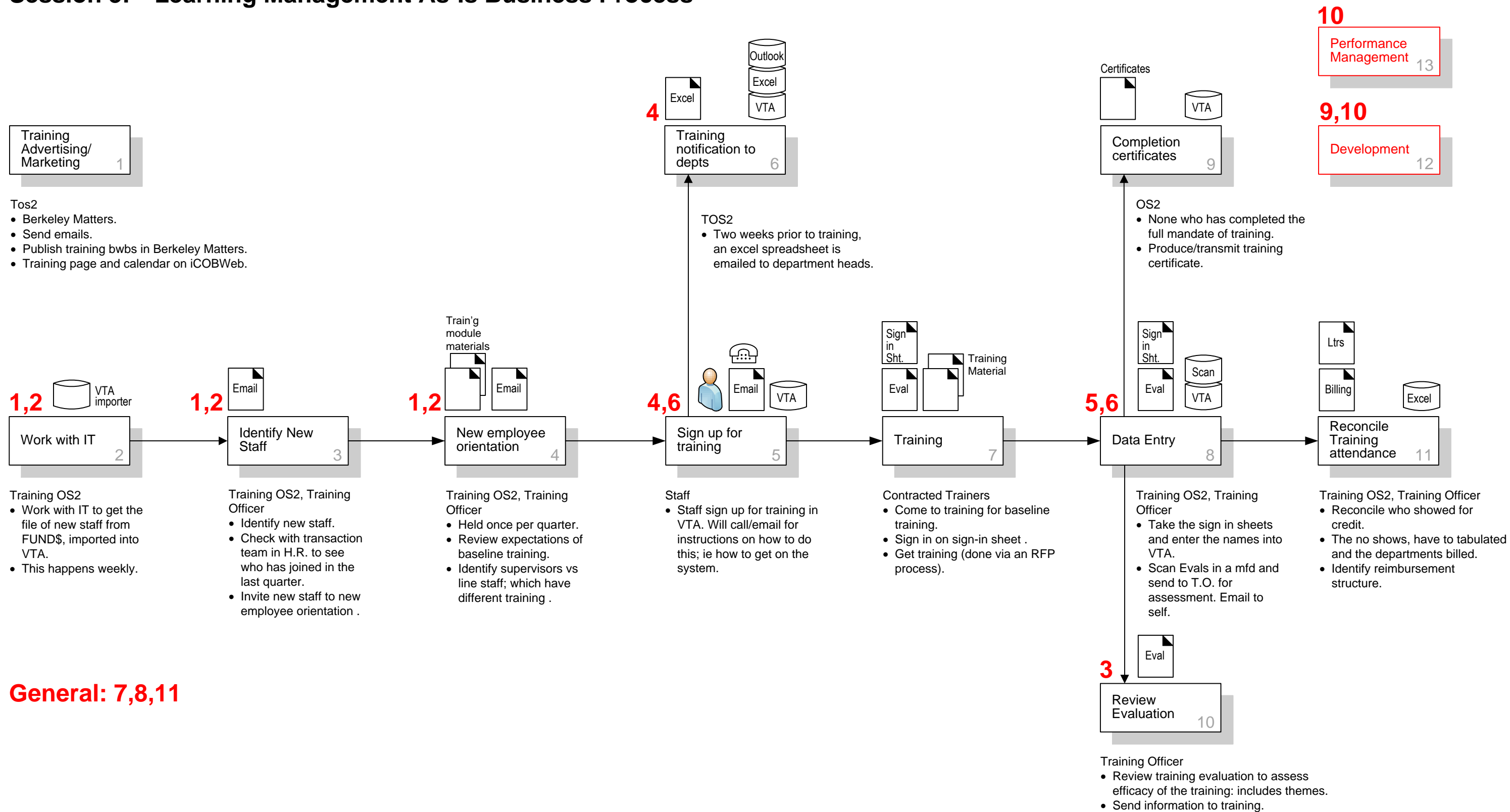
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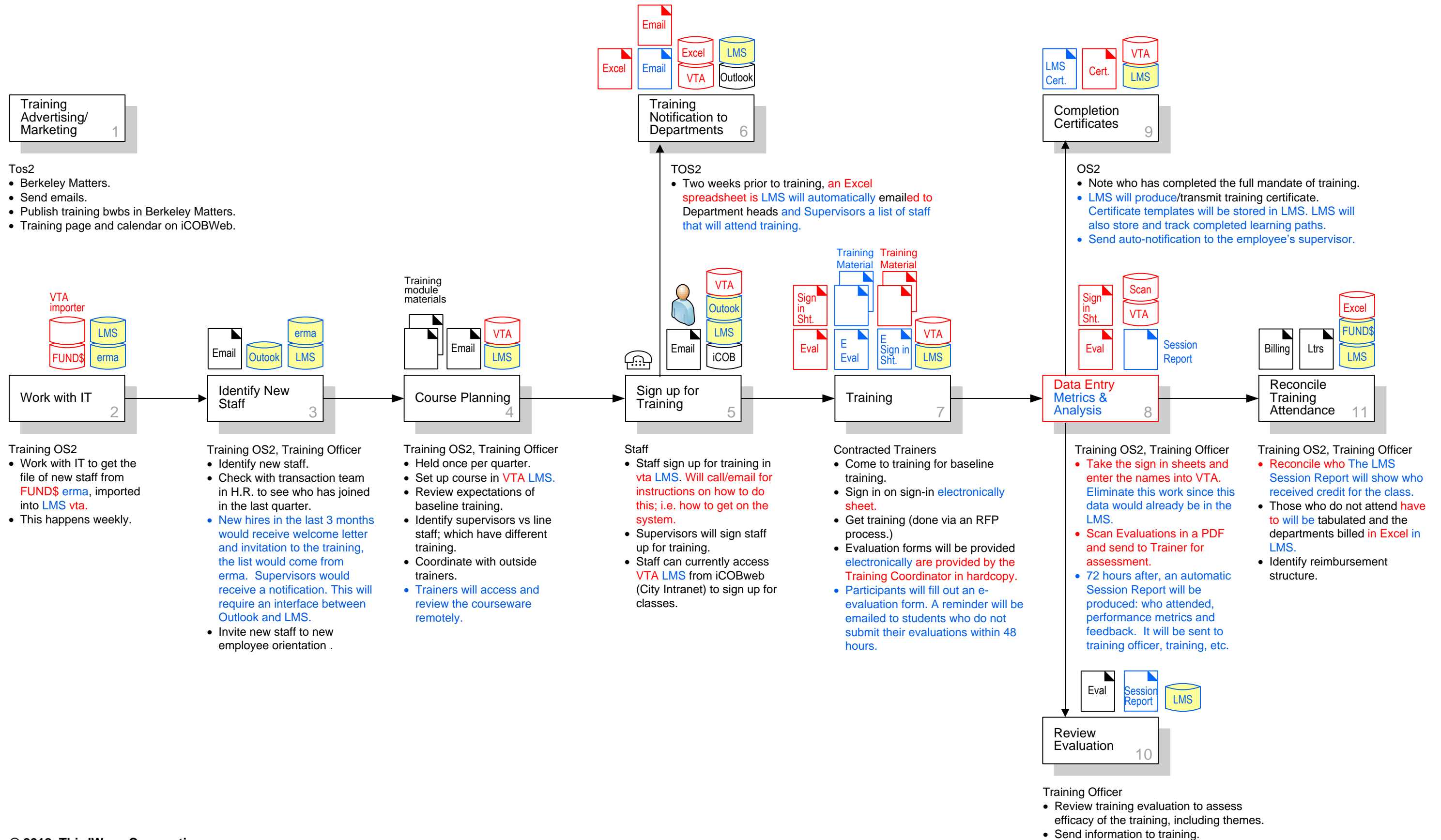


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Problems	Impacts	Solutions	Benefits
<ol style="list-style-type: none"> 1. Discreet and separate process from onboarding. 2. Separate from FUND\$. 3. Lack method to evaluate and tabulate evaluations. 4. Based on external client (Supervisors and Users) to compel training, not proactive. 5. The existing process can be inaccurate. 6. Difficult to monitor who's taken the training in key areas of the organization. 7. Everything is manual, i.e., certificates have to get names from VTA, created in a separate software. 8. Can't track the entire lifecycle from when employee joins to the training they take. 9. Cannot do Level 2 transfer of training, right now they are limited to Level 1: smile sheets. (Kilpatrick's levels of training evaluation.) 10. This process is not connected to performance. 11. Do not have material in one repository, now it is stored in folders. 12. Career development is missing. 13. Can't easily email class attendees via VTA. 	<ol style="list-style-type: none"> 1. - Inaccurate data, hit and miss. - The current process is time consuming. - Cumbersome business process. 2. - Same as #1. 3. - Training on staff time 4. - Staff time/supervisors and managers. 5. - Confusion. - A lack of trust. - A perception of incompetence. - Conflicts. 6. - A lack of accountability. 7. - Training Division staff time. - It becomes a back burner stuff. 8. - It is inefficient and demoralizing. 9. - Organizational development stagnates. 10. - Same as #6. - Lack of growth. - If managers/supervisors who are old school, staff do not benefit or consider training a priority. - Loose out on efficiency and productivity. 11. - Staff time. - Waste of paper. 12. - People fall through the cracks. - Staff turnover. 	<p>1. Implement a Learning Management System (LMS)</p> <p>Features and Functions</p> <ul style="list-style-type: none"> • Connected to the onboarding process. • Provide a method to evaluate /tabulate evaluations. • System generated reminders based on staff classification, role, and business need. • Receive accurate/timely list of new hires automatically. • Automatically issue welcome letters to new staff and supervisors. • Store new employee/training materials and certificates in one place. • Issue automatic training notifications and reminders. • Provide online training registration. • Provide post training quizzes; and acknowledgement of completion. • Electronic sign-in sheet via the system. • Generate billing statements to the invoice department. • Provide the ability to track the entire staff training lifecycle. • Provide a supervisor screen to measure behavior change and coach. • Provide a career development capabilities. • Communications on various levels notifications. • Records of who supervises whom should be automatically updated so supervisors can pull reports easily and accurately. Perhaps Allow supervisors to enroll their own staff • Automatically issue certifications of completion. • Allow Training attendees to view and/or download course workbooks, PowerPoints, handouts, etc. <p>Reports</p> <ul style="list-style-type: none"> • Training attendance • No shows • Departmental comparative reports • Trends <p>Interfaces</p> <ul style="list-style-type: none"> • erma • Coach logics • Neo gov. • OnBase (future) 	<ol style="list-style-type: none"> 1. - Improved efficiency. - Cost Savings. - Streamlined process. - Enhanced problem solving. - Foster an inclusive process. 2. - Same as #1. 3. - Cost savings. - Staff time savings. - Improved accuracy. 4. - Same as #1. - Peace of mind. - Improved training program. - Enhanced credibility. - Free up Supervisor's time. 5. - Same as #1. - Improved trust. 6. - Same as #1. 7. - Same as #1. 8. - Improved morale. - Same as #1. 9. - Organization growth. - Transformative learning environment. 10. - Improved accountability. - Improved productivity. 11. - Improved efficiency. - Cost savings. - Improved access to training materials. - Self service access to materials. 12. - Enhanced morale. - Succession planning. - More attractive and competitive work environment.

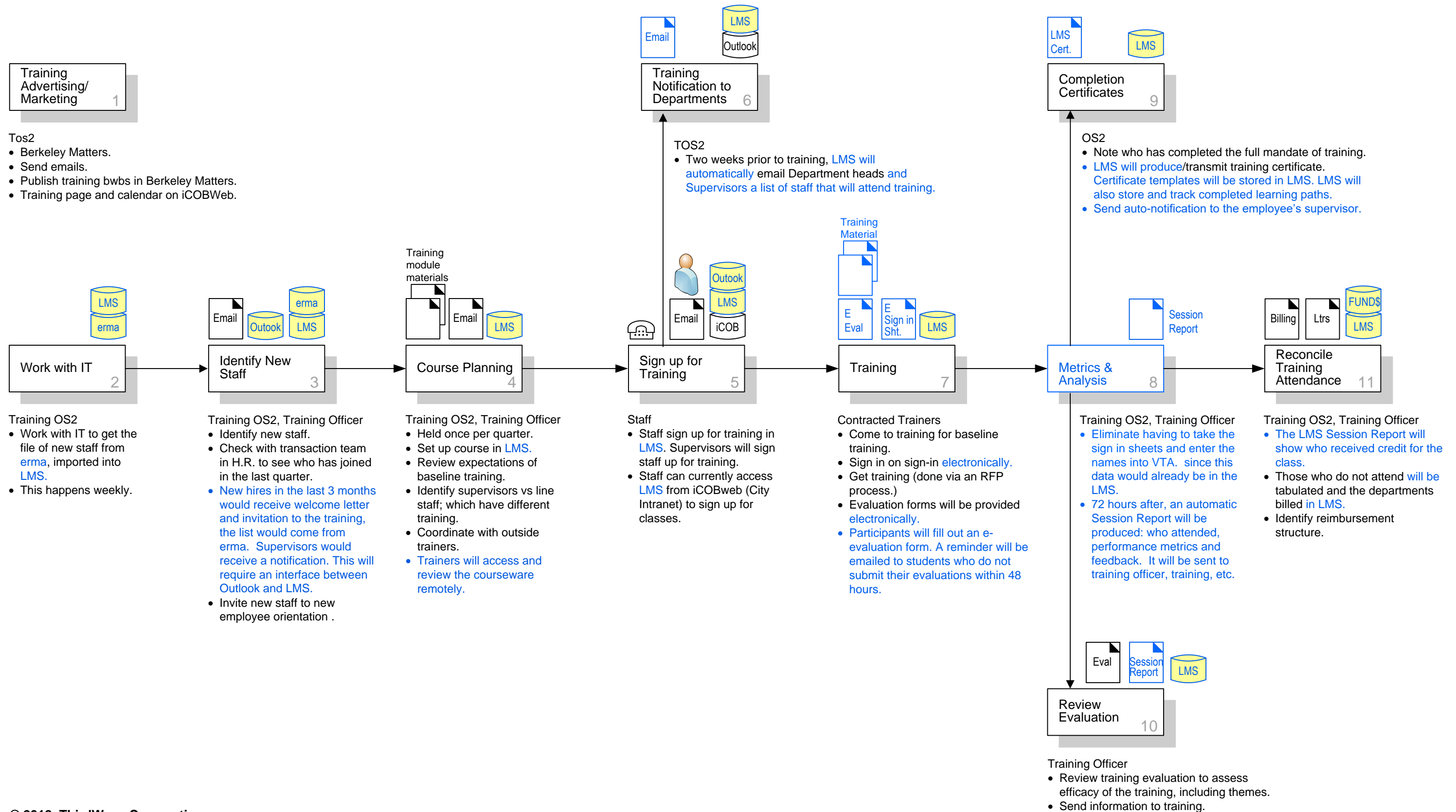


Session 3: Learning Management To-Be Business Process





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Information Technology Solutions

Learning Management System (LMS)

Features and Functions

- Training Administration:
 - Determine training status of individual staff, groups, or organizational units
 - Manage online course catalogues
 - Manage instructor-led and blended-learning offerings:
 - Store title and description, course objectives, prerequisites, required materials and credit hours
 - Manage Qualified Instructors
 - Manage Qualified Vendors
 - Management course delivery costs
 - Administer online tests
 - Track employee progress with comprehensive reports
 - Provide the ability to track the entire staff training lifecycle
 - User deactivation
 - Connected to the onboarding process, receive accurate/timely list of new hires automatically
 - Automatically issue welcome letters to new staff and supervisors
 - Generate billing statements to the invoice department
 - Provide a supervisor screen to measure behavior change and coach
 - Email Notifications - customizable templates that allows you to easily send:
 - On-demand email notifications of class cancellations, reschedules or other training notices
 - Automated notification, including: Confirmation/Reminder notes for class enrollments
 - Reminders of upcoming, pending, or past due training requirements
 - Wish-list notifications, when a course on an employee's wish-list is scheduled
 - Reminders for past-due surveys
- Add, edit and manage:
 - Predefined user roles: Staff, Manager, Supervisor, Instructor, Guest, etc.
 - Online training and compliant courses
 - Classroom training
 - Self-paced training
- Course Surveys.
- Learning:
 - Synchronization Learning
 - Blended Learning
 - Social Learning
- Student Portal:
 - Employee names and identification (ID) numbers entered once, maintained online
 - View strategic training plans/career development capabilities
 - Make effective training choices
 - Search an online course catalog
 - Select a course that meets plan objectives
 - View course schedules and select an instructor
 - Enroll quickly with a few mouse clicks
 - Send/receives enrollment confirmation notifications, cancellations and email
 - Allow training attendees to view and/or download course workbooks, PowerPoints, handouts, etc.
- Content Authoring:
 - Course description – WYSIWYG HTML Editor
 - Designate a course image – Image library
 - Course prerequisites
 - Course retake restrictions
 - Course Levels –Required vs. Elective (Public)
 - Content Library
 - Provide post training quizzes and acknowledgement of completion
 - Grading (If applicable)
 - Ability to add, edit and manage course catalogs, groupings or series by:
 - Assigning courses to course catalogs, groups or series based on predefined user roles
 - Share courses across catalogs and course series
- Manage course catalog or series display date range
- Make a course catalog or series available to all staff
- The ability to add, edit and manage user groups, company divisions, business units and brands with:
 - Gamification
- Testing & Assessment:
 - Easy-to-use templates
 - Monitors employee progress
 - Measures courseware and test effectiveness in meeting goals
 - Manages course and instructor evaluations and surveys
- Skills Tracking.
- Social Sharing:
 - Inclusion of supplemental resources with a course
 - Wait list (if applicable)
 - Discussion Board
 - Web conferencing (Webinars)
- Learner Access to:
 - Courses and learning plans
 - Course transcript/progress page
 - Course catalog
 - Profile/preference changes - Login information, language preferences, etc.
 - Certificates of Completion
- Scheduled Reports:
 - Monitor registration for upcoming sessions
 - Generate sign-in sheets
- Employee Reports:
 - Course completions
 - Compliance Completion
 - Generate transcripts of past training
 - Identify missing system information
- Exported reports to a variety of formats:
 - Adobe Acrobat
 - MS Excel
 - MS Word
 - HTML
- All reports can be run for:
 - Individual learners
 - Selected work groups
 - For an entire site

Interfaces

- erma
- Outlook
- Coach logics
- Neo gov
- OnBase (future)

Reports

- Training attendance
- Supervisor Reports (to see enrollment of their staff and review completed training)
- Training History Reports:
 - Generate session rosters
 - Track training hours delivered
 - Create post-class certificates
- Enrollment
- No shows
- Departmental comparative reports.
- Trends



Session 3: Learning Management To-Be Business Process

Business Process / Operational Solutions

- O 1. **Step 2 Work with It:** Replace Fund\$ with new erma systems. Replace VTA importer with new LMS systems. Work with IT to get the file of new staff from erma, imported into LMS.
- O 2. **Step 3 Identify New Staff:** Implement new erma, Outlook and LMS systems. New hires in the last 3 months would receive welcome letter and invitation to the training, the list would come from erma. Supervisors would receive a notification. This will require an interface between Outlook and LMS.
- O 3. **Step 4 Course Planning:** Replace VTA with new LMS systems. Set up course in LMS. Trainers will access and review the courseware remotely.
- O 4. **Step 5 Sign up for Training:** Replace VTA with new LMS systems. Implement new Outlook software. Staff sign up for training in LMS. Staff can currently access LMS from iCOBweb (City Intranet) to sign up for classes.
- O 5. **Step 6 Training Notification to Departments:** Replace Excel with new LMS software. Remove existing VTA systems and eliminate hardcopy Excel spreadsheets. Two weeks prior to training, LMS will automatically email Department heads and Supervisors a list of staff that will attend training.
- O 6. **Step 7 Training:** Replace VTA with new LMS systems. Replace hardcopy sign-in sheets with electronic sign-in sheets. Replace hardcopy evaluation forms with electronic evaluation forms. Replace hardcopy training materials with electronic training materials. Sign-in will be done electronically. Evaluation forms will be provided electronically. Participants will fill out an e-evaluation form. A reminder will be emailed to students who do not submit their evaluations within 48 hours.

Management / Policy Solutions

- O 7. **Step 8 Metrics & Analysis:** Remove existing VTA systems. The need to scan hardcopy evaluations will be eliminated since data will already be in the LMS. Produce automatic, electronic Session Reports. Eliminate hardcopy sign-in sheets and hardcopy Evaluation forms. 72 hours after, an automatic Session Report will be produced: who attended, performance metrics and feedback. It will be sent to training officer, training, etc.
- O 8. **Step 9 Work with It:** Replace VTA with new LMS systems. Produce certificates through LMS systems. LMS will produce/transmit training certificates. Certificate templates will be stored in LMS. LMS will also store and track completed learning paths. Send auto-notification to the employee's supervisor.
- O 9. **Step 10 Review Evaluation:** Implement new LMS systems. Produce electronic Session Reports.
- O 10. **Step 11 Reconcile Training Attendance:** Replace existing Excel software with new LMS systems and Fund\$ software. The LMS Session Report will show who received credit for the class. Those who do not attend will be tabulated and the departments billed in Excel in LMS.

- M 1. None.