

## ***Learning Plan Document for Health Care Cooperative***



**Submitted By: JozJul-DelaCar Strategies**

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## Corporate Identification

JJDC Strategies is a highly focused company whose members share the vision of achieving high-quality, measurable results. To meet the challenges of providing Informational and Learning Technology (ILT) solutions to our future clients we ensure that ILT is applied effectively to educational content, research and delivery. We accomplish this goal with exceptional leadership, commitment and dedication, and open communication. Collaboratively we offer value because we are professionals that offer a wide variety of skills to our customers including: open communication, cutting edge technology skills, a rich training history, multimedia, web design and development portfolios, financial and budgetary management, and a strong understanding of the current medical rules and regulations.



Our logo communicates our vision to the world in the following ways. The JJDC initials represent each of our individual names as well as personalities. But these same initials come together as one symbol reflecting the team approach that is unique to our company. The word strategies intertwined with the horizontal lines represents a forward movement through what ever challenges we are presented with or paths we are asked to choose from. Finally, our brand is represented by the statement “guiding your way to success”. We believe that a solid, professional approach to your training needs will bring about the success that you are seeking, and your return on investment will be reflected in the thorough assessment and evaluation that all of our training programs provide.

## Key Personnel

We believe that JJDC Strategies sets the standard for leadership and quality in the instructional design industry. Allow us to briefly introduce our team.

**Della Shorman Brower**, Project Manager and Primary Liaison, develops and recommends technology policies, standards, and protocols. She constantly seeks ways to build better lines of communication, image consistency, branding and usability throughout multiple forms of media, including print and web presence. She has over eight years in technology, including the design, development and management of multiple web sites along with fifteen years in the medical industry, as an instructional facilitator. Della is currently working on her Master's degree in Information and Learning Technologies from the University of Colorado at Denver.



**Juliann Ronzio**, Assistant Project Manager, leads the development of technology resources to support evaluation and assessment process. With over seven years of supervisory and management experience, including writing employee development plans, corrective actions, formal performance appraisals and drafting policy and procedures aligned with corporate, state and federal regulatory agencies, She designs and maintains database and filing system for tracking hours of training for employees with attention to enhancing learning, evaluating content and components of training, coaching learners and measuring learner competency. Juliann is currently working on her Master's degree in Information and Learning Technologies from the University of Colorado at Denver.



**Carmella Rodriguez**, Director of Multimedia, leads the design and development of sound instructional courses through beginning to intermediate knowledge of instruction, user interface, interaction, graphic, and content design. She is the founder of CineTek Productions with over 10 years of experience in multimedia development and video production. She has spearheaded the development of marketing materials for the University of Colorado at Denver and Health Science Center and put in place help line and triage training and processes. She also co-founded On-Demand Technologies in Austin, Texas, the first software company to deliver video-on-demand using analog and digital technology over telephone lines. Carmella is currently working on her Master's degree in Information and Learning Technologies from the University of Colorado at Denver.



**Jozianne Mestas**, Director of Video Production, leads the development and delivery of technology training programs. She offers over ten years in corporate video production, including the technical ability for camera operation, teleprompter operation and video editing. She is an expert in audiovisual support for the classroom setting and auditoria with videoconferencing capabilities, so that courses and presentations may be transmitted online in distant learning locations, including Adobe Connect (Breeze) desktop web conferencing software. Jozianne is currently working on her Master's degree in Information and Learning Technologies from the University of Colorado at Denver.



Della will perform a training analysis to identify training goals in areas where knowledge or skills that training needs to accomplish with learners in order that learners can meet organizational goals. From that analysis she will create the Initial Learning Plan. Juliann will create an Initial Business Plan that will include a project management plan, cost/estimate/proposal, and a preliminary program evaluation plan. The JJDC team will update the Learning Plan and Business Plan based on the feedback from HCC. Jozianne will create two synchronous presentations to be delivered online using Adobe Connect, one for the initial presentation and the second for the final presentation.

Biographical information sheets are attached and will also give you a deeper appreciation of the high level of experience we bring to the training and development table. After reviewing these biographies, we will gladly provide any additional information that you are seeking, or any clarification you feel you may need.

## Analysis of Training Problem

The primary goal of the training is to create a company-wide perspective on business ethics and the potential impact that unethical behavior can have on the company and as individuals. Secondly, the outcome for this training is that the company experiences no violations or breaches of ethics in the conduct of business. In broad terms, HCC would also like to minimize their risk for ethics violations and create a workforce that strives for a “zero tolerance” for ethics issues.

An **initial analysis** of the training problem follows.

- **Needs Analysis:**

The future trainees have all had previous training in the area of ethics. JJDC seeks to assist HCC in achieving the goal of a more appropriate level of accountability on the part of each manager in the organization for that ethics training.

JJDC seeks to design a high-quality, branded and instructionally sound training program for HCC that reflects clear performance goals and outlined objectives. JJDC will design this program to incorporate effective instructional strategies that will enhance the proposed training solution by aligning with those goals and objectives.

To assess the effectiveness of any quality-driven instructionally designed training program is the development of an assessment tool that gathers measurable outcomes of the training. JJDC welcomes the opportunity to work closely with HCC to ensure that this assessment tool provides the information necessary to ensure the accountability of their employees and to sculpt the training as needed for future trainings.

We will design this training program to incorporate sound multimedia and presentation design. This approach will ensure that the high-quality program that results will engage your learners through a collaborative learning environment.

JJDC is looking forward to working with HCC to design a rigorous training that includes an appropriate level of accountability on the part of each manager/participant, which will in turn minimize potential risks to individuals and the HCC organization.

- **Learner Analysis:**

From the response to the initial Request for Proposal and addendum #1 to the RFP, we have determined that there will be 60-100 learners, currently in senior-and mid-level management, who represent the leadership team of HCC. These managers are located in eight states across the United States, which reflect multiple time zones.

The Ethics training program requires the target audience to have access to a personal computer running Windows operating system (pre-Vista) in one of the eight company locations and T1 Internet infrastructure company intranet. They must have a base level of knowledge and skills to successfully navigate the Windows Graphical User Interface (GUI) and environment and be proficient using basic software. Learners should have knowledge about media players, collaboration software for synchronous web-based interaction, and other Microsoft products.

Addendum #1 to the RFP addresses the technology environment of the learners. Learners have access to personal computers (PC-based), a T1 Internet infrastructure in each of the eight locations and possess the necessary skills to use basic software such as Microsoft Office 2003 Professional (Word, Excel, PowerPoint, Access), Flash-enabled Web browsers (Microsoft Internet Explorer 6.0 and above, or Mozilla Firefox 1.5 and above), Adobe Acrobat Professional and Adobe Reader (versions 6.0 and above).

Learners have limited experience with media players (Windows Media Player, QuickTime, RealPlayer, and Flash Player) and with other Microsoft products (Project, Visio, etc.). Currently, HCC does not use any collaboration software for synchronous, web-based interaction within and across offices (e.g. Breeze, Wikis, Blogs, LiveMeeting, WebEx). JJDC will provide basic training for learners that have limited experience with media players and collaboration software. This training will assist the learner in those environments to be able to successfully complete the ethics training modules.

In the past, senior-and mid-level management attended mandatory ethics training at the annual company meeting. Leaders received excellent training and opportunities to collaborate with peers to discuss specific problems that surfaced within the company.

The target audience has had prior ethics training and strives to have a “zero tolerance” for ethics issues. Learners are proficient at using the PC, the Windows environment and basic software. Experience with these tools will help the learners make an easy transition from simply using the PC to interactively participating in the training modules with their peers through collaboration software. According to the Addendum #1 to the RFP, HCC believes they have a positive working environment through the dedication of the women and men of the organization. Motivation factors for employees are incentives and rewards for establishing a positive culture. The dedication of the women and men of the organization help keep HCC established as a leader in their industry. These managers present with an employment history of between 5-25 years, which indicates a positive retention rate. Employee morale is not currently measured at HCC. JJDC would like to survey the target population to measure employee moral and attitudes toward ethics and the delivery system. The information gathered would help JJDC design a course that challenges but doesn't overwhelm the learners. It's important to know what to teach the learners. Learners do not require any special languages other than English or special accommodations for visual, hearing or physical impairment.

Learners prefer “high quality presentations” and believe that effective training involves the interaction of participants with each other. Leaders are provided an opportunity to collaborate with others and discuss the repercussions of unethical behavior and share solutions on how to help create a more ethical workforce.

JJDC will deliver a course that maximizes learner interaction and engagement. We will design our courses based on the following:

- A sound instructional design strategy with clear performance-based objectives, effective instructional strategies, and appropriate assessment of stated objectives
  - An overall approach and graphic treatment that adheres to established principles of multimedia or presentation design
  - Learning strategies that engage learners, encourage collaboration, and results in measurable performance improvement
- Content Analysis:

The primary goal for this training is to create a company-wide perspective on business ethics and the potential impact that unethical behavior can have on the company and as individuals.

The training will initially address two critical areas:

    - employee personal conduct, which includes promoting a positive work environment and respecting others in the workplace and;
    - appropriate use of company assets.

Upon award of the contract, further discussions with HCC for additional content specifics will be planned. JJDC will work closely with HCC to obtain specifics for ethics regulations and what constitutes violations of those regulations in order to incorporate these aspects into the training program.

We anticipate a review of the employee handbooks, incentive plans and reward systems that are currently in place at HCC. This will provide further insight into how positive employee conduct is recognized and rewarded.

Finally, JJDC will team with HCC to look at company resources and assets and discuss what challenges have occurred in the past and what steps have been taken to manage those assets. We look forward to formulating strategies within the training program that clearly define what the appropriate use of assets is and how the employees at HCC can become vested to their responsibility of this critical area.

- **Context Analysis:**

Currently, HCC training provides leaders with opportunities to collaborate and discuss specific problems that arise in the workplace. In keeping with that successful strategy, JJDC will develop a training platform that will allow managers the opportunity to engage in interactive simulations of day-to-day ethical situations. Managers will also participate in online discussions about workplace ethical challenges and resolutions.

The intent of providing interactive simulations of day-to-day ethical situations is to provide a safe environment for managers to learn to respond to ethical challenges in a manner that promotes a positive work environment. Online discussions will then serve as an effective tool for collaborative dialogue and problem solving. This will be accomplished by means of a secured website that allows multiple users to add content, known as a wiki or web log (blog).

In order to determine the types of day-to-day ethical situations that managers may encounter, an initial employee survey will be conducted. This survey will gather manager input and reveal the potential circumstances that lead to possible ethics violations. Information from this survey will establish the content for the interactive learning scenarios or modules.

From a technology access standpoint, the future trainees have access to personal computers with Internet access and basic office software. Therefore, each training solution will occur in an online environment. Since HCC has a stable network of personal computers (PC-based) with the appropriate infrastructure (T1 Internet access / company intranet) in each of its eight locations, and each employee in the target audience has sole access to a desktop computer, on-line training access will be the most efficient and cost-effective delivery method.

- **Task Analysis:**

What specifically do the users need to know after completing this instruction? What additional requests by HCC should be included in the objectives for this proposal? Upon award of the bid, JJDC will work closely with HCC to gather additional content specifics. This will allow for a complete task analysis to be completed and will define the specifics for what the users will know after completion of the training.

## Initial Proposed Solution

The two goals of this training program are:

1. To create a company-wide perspective on business ethics and the potential impact that unethical behavior can have on the company and as individuals.
2. At the completion of this training, HCC experiences no violations or breaches of ethics in the conduct of business. These goals will be reflected two-fold:
  - a. Minimized risk for ethics violations and
  - b. Creation of a workforce that strives for a “zero tolerance” for ethics issues.

The basic content of this training will address two critical areas:

- employee personal conduct, which includes promoting a positive work environment and respecting others in the workplace; and
- appropriate use of company assets.

JJDC will work closely with HCC to create a fresh perspective to the training problem and to leverage the rapid technological changes in the training business. JJDC will do this by bringing new ideas to the format and structure of the training solution that will be up-to-date and reflect a sound instructionally designed process. Due to the physical location of HCC branch offices, the training program must have remote access from any point within the United States. JJDC believes that the most cost-effective overall approach will include the design and development of a computer-based training program, available 24/7 by any of the trainees.

Prior to the design of any actual computer training, the JJDC Strategies solution is initialized by establishing a baseline of all ethical guidelines currently in place at HCC and a thorough review under the guidance of HCC to determine what constitutes violations of those guidelines. This will ensure that the content of the training program addresses those issues.

After establishing the baseline for those guidelines, JJDC would propose the development and implementation of an employee survey. This would allow us to gather employee thoughts, attitudes and experience surrounding ethics in the workplace, and would provide an objective measurement prior to the further development of the project. To determine this starting point for learners, we would conduct the initial survey online. This would include the managers as well as the front line employees. JJDC would also plan to conduct live interviews with employees at HCC. Based on the results of these initial surveys and interviews, we would be better equipped and informed as to how best to present the content specifics stated above as to the video pieces that we would develop for the managers and employees.

Next, a two-part course with a series of modules for each course would be developed. The first of these courses would address employee personal conduct. The modules within this first course include compliance with federal and state laws, employee harassment and discrimination, promoting a positive work environment and respecting others in the workplace. The second of these courses would be the appropriate use of company assets. The modules within this course include company assets defined, appropriate and inappropriate use of company assets, and legal and company-wide implications for misuse of assets.

For each of these courses, brief video clips, 45-60 seconds each, will be included that will illustrate the scenarios. The videos will employ the use of professional talent to act as employees in a given situation of 'employees' (actors) acting out scenarios.

The first course would include three video clips. The first clip would portray positive personal conduct and would include examples of how to respect one another in the workplace. The second and third of the video clips would demonstrate improper behaviors, and provide specific examples of what would constitute ethical violations.

The second course would also include three video clips. The first clip would portray examples of the appropriate use of company assets. The second and third of the video clips would show violations of the use of company assets, for example an employee playing games on the computer when they are at work.

After reviewing the videos, each learner will be asked to respond to various case scenarios through an interactive, online question and answer survey. The response choices would include an ethical decision, where the learner is forced to make a selection. Based on their selection, they will be lead to the "right" or "wrong" outcome. This response scenario will engage the learner by providing immediate feedback online after completion of the survey, whether the answers the trainee provided were correct or incorrect.

After the completion of the interactive survey, JJDC would also set up an online discussion in the form of an online discussion forum, for example a wiki or web log (blog), ensuring confidentiality and to serve as a resource for sharing stories about the training. The comments and concerns gathered from this online discussion could help to shape any future training by JJDC. A member of JJDC Strategies could initially monitor this online discussion forum. We would recommend that a member of the internal training staff of HCC work with us to monitor for appropriate comments in the future.

Print resources for these modules will be available for download and will be optional for individuals to print. These print resources would include the initial survey for all employees, and the post-video interactive survey that will assess the level of understanding for the content taught within the modules. If individuals are given the opportunity to print their own materials, this will provide a significant cost saving due to the costs associated with printing materials for 60-100 participants as well as shipping costs to the eight locations across the United States.

JJDC Strategies Solution Summary includes:

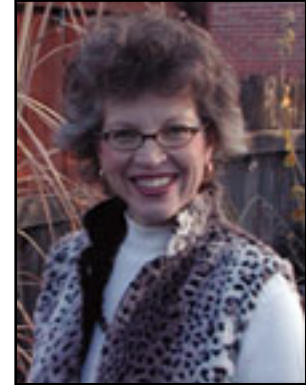
1. Preliminary Survey
2. Online-Video with examples of role play.
3. Interactive Scenarios which also tracks their answers (for the assessment of their learning)
4. Wiki/Blog for interaction
5. Company Manuals and Surveys utilized for training available for download.

## Biographies

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### Professional Biography of Della Shorman Brower

Della Shorman Brower is the Communications Coordinator for the Competitive Grants and Awards unit of the Department of Education. She is the primary liaison between the unit and the leadership teams which exist in outlying K-3 classrooms across the state. She facilitates communication to these schools via email, phone, web sites, webinars and the bi-weekly electronic newsletter. She also works to maintain the budgets for the grant schools as well as the state-wide professional development conferences. She serves as the Web Content Coordinator for six web sites and databases that exist within the unit. She constantly seeks better ways to build better lines of communication, image consistency, branding and usability throughout the web sites.



#### Career Highlights

- Webmaster, Arapahoe Community College, Littleton, Colorado (2003-2007)
- Educational Technology Specialist, Arapahoe Community College, Littleton, Colorado (2001-2003)
- Freelance Web Designer and Developer, Denver, Colorado (1999-Present)

Shorman invested fifteen years in the field of dietetics and diabetes education where she had the opportunity to teach a diverse adult clientele in group classroom and one-on-one educational settings. She created educational materials based on her knowledge of document layout and a single course in Educational Psychology. It was during this time that she was introduced to the area of instructional design.

She moved into the technology field in the late 1990's, completed a college certificate program in Multimedia and Graphic design and began freelancing for the design and development of web sites. In 2001, she accepted a position as an Educational Technology Specialist at Arapahoe Community College in Littleton, Colorado and began working in a content management system for online education. She continued to develop her computer skills and apply them while working with faculty for online course development and as well as technical troubleshooting for students.

In late 2003, her position evolved into the role of webmaster for the college where she also served as an official member of the college marketing team. She provided valuable assistance for the creation of a consistent brand for the college and applied the outcome specifically to the three websites she was charged with managing. She also stayed involved in educational technology through her role as a member of the online learning team.

#### Education

Graduate School, Information and Learning Technologies  
University of Colorado-Denver, Currently enrolled  
Bachelor of Science, Foods and Nutrition with Business Emphasis  
Kansas State University, Manhattan, May 1983  
Associate of Applied Science, Multimedia Technology (Graphics and Animation)  
Red Rocks Community College, December 2000  
Advanced Studies in Nutrition Science  
University of Otago, New Zealand, Rotary Scholarship, 1986

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## Professional Biography of Juliann Ronzio

Juliann Ronzio has been coordinating youth programs at Devereux Cleo Wallace, a residential treatment center for children and adolescents, since 1999. For the past two years she has managed the Training Department for 230 employees. Employee's jobs range from direct care, clinical, nursing, support, administrative, teaching and paraprofessional staff providing service to one hundred twelve children and adolescents twenty four hours a day, seven days a week. Juliann is responsible for designing, organizing, communicating and delivering all orientation and annual training to all employees. She collaborates with Devereux's Institute of Clinical Training and Research to identify current trends in the field of psychology, strength-based treatment approaches, special education, human resources and leadership skills to incorporate in the development of professional staff. Juliann trains and coaches new staff in building competency in the following skills: medical record documentation, environmental management, crisis prevention and intervention, and therapeutic relationship building with youth.



### Career Highlights

- Member of American Society for Training and Development
- 2006 Kris Miller Leadership Award recipient, awarded to a Devereux Cleo Wallace employee achieving outstanding results and demonstrating exceptional leadership
- Crisis Prevention/Intervention Trainer, published by Devereux's Institute of Clinical Training and Research, Villanova, PA
- QPR Suicide Prevention Program Gatekeeper Trainer, QPR Institute, Spokane, Washington
- New Directions Social Learning Curriculum Instructor, essential skills for direct care staff, published by the Child Welfare League of America
- Colorado Department of Health Medication Administration Certification
- Emergency Response Institute Instructor, Healthcare Provider for CPR and First Aid, American Red Cross Lifeguard

Juliann is dedicated, a creative and hard-working learning professional, skilled in designing training to meet needs, delivering training to enhance learning, evaluating content and components of training, coaching learners and measuring learner competency. She excels in managing multiple projects concurrently with strong attention to detail, quality and outcome. Juliann has superb listening and communication skills and is an esteemed leader in organizational change.

Juliann has seven years of supervisory and management experience, including writing employee development plans, corrective actions, formal performance appraisals and drafting policy and procedure aligned with corporate, state and federal regulatory agencies.

### Education

Graduate School, Information and Learning Technologies  
University of Colorado-Denver, Currently enrolled  
Bachelor of Arts, Philosophy  
University of Colorado at Boulder, 1998  
Bachelor of Arts, Psychology  
University of Colorado at Boulder, 1998

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## Professional Biography of Carmella Rodriguez

Carmella Rodriguez is the founder of CineTek Productions with over 10 years of experience in multimedia development and video production. CineTek Productions works in conjunction with other video and multimedia companies to create the highest quality product possible with the utmost integrity and professionalism.

She is also the Technical Director for the University of Colorado at Denver and Health Science Center's Colorado Alcohol Spectrum Disorders Prevention Outreach Project (COFAS-POP). As the director of the media campaign she has spearheaded the development of marketing materials, databases, women's health Public Service Announcements, and clinic videos. She has put in place help line and triage training and processes.



### Career Highlights

- Technical Director/Media Coordinator, UCHSC (2005-2007)
- Video Producer/Editor, CineTek Productions (1999-2007)
- Testing Engineer/Consultant, Level 3 Communications, Inc. (1998-1999)
- Testing Engineer/Consultant, Galileo International, (1997-1998)
- Multimedia Programmer/Consultant, Sanctuary Woods Multimedia Corporation, Inc. (1994-1997)
- Co-founder/Software Engineer/Project Manager, On-Demand Technologies, Inc. (1992-1994)
- Software Engineer/Consultant, American Airlines Decision Technologies, Inc. (1991-1992)
- Software Engineer, Texas Instruments (1989-1990)
- Software Engineer, Los Alamos National Laboratory (1987-1989)

Carmella was first introduced to video technology in the early 1990s while co-founding On-Demand Technologies (ODT) in Austin, Texas. ODT was the first software company to deliver video-on-demand using analog and digital technology over telephone lines.

She was a lead developer on the Wm. C. Brown Publishers, "Explorations in Cell Biology & Genetics" interactive multimedia cross-platform CD-ROM project produced by Sanctuary Woods Multimedia Corporation, Inc.

Carmella came to Denver, Colorado to test one of the first web airline ticket reservation systems developed by Galileo International for United Airlines. After completing the on-line reservation project, she focused her efforts on building CineTek Productions.

### Education

Graduate School, Information and Learning Technologies  
University of Colorado-Denver, Currently enrolled  
Bachelors of Science in Computer Science,  
College of Santa Fe, May 1986  
Associate of General Studies in Film/Video Post-production,  
Aurora Community College/Colorado Film School, May 2005

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## Professional Biography of Jozianne Mestas

Jozianne Mestas has numerous years of experience in corporate video production. In 1996, she began working in US WEST's Creative Services department and served as an intern, production assistant and production coordinator. She acquired a comprehensive understanding of various processes: budgeting, billing, project management and working with people at all levels.

Mestas also gained a thorough perspective of how a project is managed from start to finish, while attaining technical skills through hands-on experience. Her video production skills include camera operation, teleprompter operation and video editing.



### Career Highlights

- Electronics Specialist, University of Colorado at Denver and Health Sciences Center, Denver, Colorado (2001-2007)
- Freelance Video Production Specialist, Denver, Colorado (1997-2001)
- Producer, City and County of Denver Television Services, Denver, Colorado (1998-1999)
- Production Coordinator, U S WEST Creative Services, Denver, Colorado (1996-1997)

Personally, Jozianne has always enjoyed learning about new technologies, especially if she can find applicable and effective ways to incorporate them into her daily life.

As stated by Surry and Ely, when referring to Rogers' (1995) concept of perceived attributes, "people are more likely to adopt an innovation if the innovation offers them a better way to do something, is compatible with their values, beliefs and needs, is not too complex, can be tried out before adoption, and has observable benefits." Jozianne believes it is a common feeling for most people; they are more receptive to adapting a new technology if they can find a personal advantage for its use.

She also believes that people learn best by performing tasks themselves because then they minimize their reliance on other individuals and empower themselves to complete that task. In other words, she would favor a constructivist view on learning because she truly feels that the most enriching educational experiences are through personal experiences.

Throughout her career Jozianne hopes to build on her past experiences with new experiences in responsibility, project management, and leadership. Enriching her knowledgebase in this manner truly enables her to be an effective Instructional Technologist.

### Education

Graduate School, Information and Learning Technologies  
University of Colorado-Denver, Currently enrolled  
Bachelor of Arts, Technical Communications  
Metropolitan State College of Denver, May 1996