

Portfolio 3

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Specific course learning outcomes for which credit is being sought

[Before a portfolio can be accepted for assessment, the specific course learning outcomes must be printed on the back of the rubric.]

COMS 4510 - Instructional Training & Development in Communication

Define and explain various learning styles and the strategies used in making connections with different styles

Describe the characteristics of adult learners that make them distinct from and similar to college-aged learners

Explain the importance of training and development programs in various contexts including but not limited to private and public sector organizations, not-for-profit organizations, and community service groups

Work with a training team to prepare lessons for training and development programs

Enact components of a training program that have been planned and agreed upon by you and other members of your training team

Stephanie -

[REDACTED] Drive

[REDACTED] OH [REDACTED]

740 [REDACTED]

PIO# [REDACTED]

PORTFOLIO

INSTRUCTIONAL training AND DEVELOPMENT

Submitted: March 13, 2017

PREFACE

This portfolio communicates details of my prior work experiences and the learning involved throughout my years of employment. I submit this portfolio to Ohio University faculty members for its evaluation towards college credits. I am deeply grateful for the time and consideration of those involved in this process, and appreciative that Ohio University provides the opportunity to earn college credits through experiential learning.

I have made *every* effort to provide as much information as possible; however, please feel free to contact me if additional information or materials are needed.

Stephanie [REDACTED]

PORTFOLIO DEVELOPMENT HONESTY STATEMENT

17-17

DATE

Stephanie

NAME AND PID#

I HEREBY GIVE NOTICE THAT THE MATERIAL CONTAINED IN THIS PORTFOLIO HONESTLY AND ACCURATELY REFLECTS MY LIFE, LEARNING, AND WORK EXPERIENCE.

I UNDERSTAND THAT THE PENALTY FOR FALSIFYING ANY INFORMATION OR DOCUMENT IS A GRADE OF .E IN THE PORTFOLIO DEVELOPMENT COURSE, WITHDRAWAL OF ALL COURSES FOR ASSESSMENT, AND A LETTER OF REPRISAL IN MY PERMANENT FILE.

STUDENT'S SIGNATURE

NOTARY PUBLIC

STATE OF:

COUNTY OF:

Being duly sworn, upon his/her oath says that the above statement is true to the best of his/her knowledge and belief.

STUDENT'S SIGNATURE

Subscribed in my presence this 11 day of October, 2017.

(Notary Seal)

NOTARY PUBLIC

(My Comm. Expires 6/12/21)

EVEYN BLAKE
NOTARY PUBLIC, STATE OF OHIO
MY COMMISSION EXPIRES 6/12/21

Stephanie [REDACTED]

UC2030

CHRONOLOGICAL RECORD

[REDACTED] - 2016

[REDACTED] As a member of [REDACTED] High School Varsity, won [REDACTED] Cheerleading Champion in the individual competition; Nashville, TN.

[REDACTED] As a member of [REDACTED] High School Varsity, won [REDACTED] Cheerleading Championship; Nashville, TN.

[REDACTED] As a member of [REDACTED] High School Varsity, won second - [REDACTED] Cheerleading Championships ; Nashville, TN.

1991

1991 (a) Graduated from [REDACTED] High School; [REDACTED] OH.

(b) Worked at [REDACTED] Cheese Shop in [REDACTED] OH. Cooked, cleaned, ran the cash register, stocked shelves, performed bank reconciliations, and provided general customer service.

1991

(a) Gave birth to a son,

(b) Resigned from [REDACTED] Cheese Shop and moved to [REDACTED] OH.

(c) Was hired as a retail sales associate at [REDACTED] Inc. Promoted to Customer Service and Sales Manager. Set up a brand new store in [REDACTED] OH.

1991

(a) Worked closely with the [REDACTED] district manager on professional development, product knowledge. Regularly traveled to [REDACTED] for trainings and conferences, trained new hires.

199.

(a) Resigned from [REDACTED] - moved back to [REDACTED] County.

- (b) Employed as a Customer Service Specialist at
(later changed to) ██████████
- (c) Completed 40-hours of customer service training in ██████████ OH.
- 1991 Began Human Services and Corrections coursework at ██████████ College .
- 1991 Had a second child, a daughter named ██████████
- 1991 (a) Completed a 40-hour Case Management internship at ██████████
Correctional Facility.
- (b) Became employed as an Advertising Account Executive at ██████████
██████████ Developed annual marketing plans for small businesses and
created effective ads and other print-based materials.
- 2001 (a) Accepted a position at ██████████ Inc. as a Customer Service
Representative.
- (b) Promoted to Corporate Trainer.
- 2001 – 2001 Facilitated new hire, sales, and customer service trainings. Traveled to
present training courses to representatives from approximately 50 sales
centers and parent company,
- 2001 Developed standard operating procedures and training manuals for sales,
customer service, data entry, product-knowledge, and train-the-trainer.
- 2001 (a) Remained in ██████████ after ██████████ Inc. was purchased by
(another) Corporation.
- (b) Went ██████████ for six weeks to provide training to ██████████ staff on
products and services . Served as a liaison during the transition of work
from ██████████ to ██████████
- (c) Accepted the Assistant Director of Operations positions at ██████████ in
██████████ OH. Completed four weeks of center management training in ██████████
██████████ Learned Federal Drug Administration (FDA) and European

Medicines Agency (EMEA) standards and regulations, and served as a liaison during audits. Managed daily operations of 40+ staff and 50-100 donors per workday.

(c) Judged the World Cheerleading Championships for the Cheerleading Association (- at the [REDACTED] Hotel in

2001

(a) Married

(b) Promoted to Quality Manager at [REDACTED] Audited plasma donation centers for FDA and EMEA compliance. Completed approximately 180 hours of training in.. OH. Performed evaluations on policies, product quality , employee performance, management, compliance, incidents, and other aspects of the business . Generated tracking and trending reports, quality incident reports, and issued disciplinary action when necessary.

2001

Had my third child, a daughter named

Resigned from

2001

(a)

(b) Accepted the position of Training Coordinator for the Board of Developmental Disabilities .. BDD). Charged with the task of designing a training program for individuals with disabilities who had an interest in supported community employment. Developed follow-up programs to ensure job retention. Nominated for APSE (Association for Persons Supporting Employment First; formerly Associations for Persons in Supported Employment) [REDACTED] of the Year. Continued to work in this capacity and grow the organization for the next seven years.

2001

(a) Named APSE [REDACTED] of the Year; [REDACTED] OH.

(b) Nominated by APSE for [REDACTED] of the Year.

(c) Hired as the [REDACTED] Coach **at** [REDACTED] high School.

20a (a) Named APSE _____ of the Year;
(b) Coached _____ to a _____ Championship at the _____ Championship,
OH.

20• Coached _____ to an International Championship at the _____ Championships,

20• Promoted to Executive Assistant to the Superintendent of the _____ Board of Developmental Disabilities. Worked closely with management, Board members, county commissioners, consultants, and stakeholders developing high-level communication, contracts, training, staff development, and many other projects. Facilitated steering committee meetings, and assisted in the development of the strategic plan. Coordinated and participated in Board meetings and trainings, public forums, staff development, and recreational retreats. Wrote the DD newsletter, updated and maintained the website, and designed the new IIIIII3DD logo.

20redacted Accepted a position at _____ as an Administrative Associate in _____ Responsibilities included purchasing and other financial transactions for the

Stephanie UC2030 GOALS

I made (redacted) for the first time in the fourth grade. I remember riding home afterwards with my father. When he pulled the car into the driveway he looked over at me and said, "You knocked it out of the park." I looked up at my father from the passenger seat and replied with a serious and confident tone, "I'm going to be the best [REDACTED] in the world one day." Five years later, and after a lot of hard work, my dad watched me win my first world championship. I was 14 years old.

I would go on to win three world championships before graduating from high school. Athletic scholarships were offered to me, but as I was preparing to leave for college I learned I was expecting a child. I had decided to attend [REDACTED] The [REDACTED] because they had one of the best collegiate [REDACTED] programs in the country in 19[REDACTED], and as much as I wanted to be part of it and have the traditional college experience, I chose to have my son.

My family grew over the next 20 years, and although my husband and three children were always my first priority, I continued to feel driven and upheld a

strong desire for professional achievement. What manifested were all the characteristics of a hard-working, career-minded professional, but one with limitations. Regardless of my talent, ability, and commitment, I knew that without a degree there would be a threshold I could not cross. I always expressed the value of education to my children and yet, I had not finished college myself. That also weighed on me heavily.

I am finally at a place in my life that allows me to make education a priority. I am seeking a Bachelor's in [REDACTED] My area of concentration is Management of (redacted)

I knew I had found my niche the first time I stood in front of a classroom and delivered a customer service training. I enjoyed everything about being fully enveloped in the instructor role, including the design and development of training programs, facilitating training, and researching its effectiveness. My goal is to become a training consultant and work with businesses to develop effective training programs or to contract with businesses to deliver training according to their specific needs. Traveling is a passion of mine, and I would delight in the chance to meet people from other places, visit new businesses, and make a contribution to their successes along the way.

I would like to develop a comprehensive customer service training program, publish it, and market it to businesses so they can use it for their onboarding and other in-house training sessions. My vision of this includes a series of videos, training materials, training aids, facilitator guides, and a website that offers additional services, products, and helpful information.

Because the instructional component is so meaningful to me, I also envision myself pursuing a graduate degree and teaching at a community college or adult learning center.

It is important to me that I demonstrate to my children, friends and family, that it's never too late to achieve goals. I want the sense of accomplishment. I want the knowledge, experience, and credentials to have better control over my career path. I want to open up the ceiling of opportunity. I want to be the first person in my family to earn a college degree and I want my kids to follow suit.

More than anything, I *want to knock it out of the park again.*

Stephanie

UC2030

Assessment Request

1. COMS 4510: Instructional Training and Development
2. CONS 3100: Human Resources for Customer Service Professions
3. CSD 1080: Introduction to Communications Disorders
4. **MGT** 2000: Introduction to Management
5. **MGT** 3050: Applied Management and Supervision

Stephanie

Learning Statement for COMS 4510

Instructional Training and Development in Communications

The purpose of this learning statement is to communicate the details of my work experience in Instructional Training and Development, and to formally request experiential learning credit for COMS 4510 based on the knowledge and competencies I have acquired from those experiences. With more than 12 years' experience working in official training capacities, I feel my proficiencies align with the requirements of this course.

[REDACTED] Inc.

[REDACTED] Inc. was a printing company based in **[REDACTED]** Ohio. The call center located within the **[REDACTED]** facility had approximately 150 sales and customer service representatives. In addition, **I** employed field salespersons in more than 50 district offices across the United States. From **redacted** it was my responsibility to train those employees, develop their sales and service skills, evaluate data to identify trends, and survey employees and customers to enhance training and development initiatives [1]. A typical new-hire class for the call center consisted of 10-15 trainees and lasted for six 40-hour

weeks; four weeks in the classroom, and two additional weeks on the sales floor with a coach. Field sales representatives came to each quarter in groups of 15-20. Their classroom-based training consisted of one 30-hour week.

Through some trial and error, I learned the importance of the peripheral aspects of training and how they influence class dynamics. I developed a checklist that served as an aid in planning and coordinating training [2]. Having an increased level of preparedness and taking a proactive approach to various foreseeable and preventable hiccups allowed me to concentrate more on my content and delivery.

The [REDACTED] executive team always encouraged me to participate in train-the-trainer courses and to research information that would grow my understanding of adult learning and proven instructional techniques. One of the professional development courses in which I participated was with Learning Services [3]. As a facilitator, I demonstrated the ability to effectively manage the group. I arrived prepared and with a plan, communicated the guidelines and expectations in a clear manner, yet I remained flexible enough to adapt when necessary. My personality and approach naturally allowed for humor in the classroom and fostered an interactive, open atmosphere; however, - and other workshops provided significant enrichment opportunities for me.

coursework was particularly well-focused on various methods of presentation and facilitation [4]. Methods and strategies were explored, practiced, and analyzed. Several applications and learning strategies taught in these

sessions were subsequently incorporated into my own training style. The fundamentals of and differences between teaching children and adults were also areas of concentration in many of the professional development courses I completed. Typically, pedagogical and andragogical theories and principles were combined with more comprehensive instruction about adult learning styles [5], how to recognize a trainee's style, and how to engage and accommodate auditory, visual, and kinesthetic learners.

I participated in numerous self-assessment exercises and realized that my learning style varied depending on the information or task being taught. I believed that most people would benefit from having all three of the major learning styles incorporated into their training. As a result, I adapted the facilitator's manual so each section contained a built-in lesson that supported each learning style. Icons of an eye, hand, or ear throughout the manual indicated the learning style the lesson or exercise targeted. In a further effort to better accommodate the adult learner, I supplemented the manual with quizzes, problem-solving activities, role playing challenges, and exercises that could be completed independently.

The theory that adult learners needed to understand why they were learning a new task or skill was particularly thought provoking for me and ultimately generated an idea. I designed and piloted a training called (*redacted*).

Participants studied actual error reports from the call center, chose a case study from the report, investigated the error and determined the root cause. They

followed and documented the remake through the production and shipping processes, recorded any credits issued, determined the total cost to the company, viewed feedback from the customer, and then presented his or her findings to the class. Members of the first class that completed *The (redacted)* had such low error rates (the lowest in the company) that the corporate office recommended the training for all call center representatives. The impact of the large-scale training was so substantial that I was sent to our parent company, to implement the training there.

Trainings, workshops, and conferences were all great resources for getting new ideas for icebreakers and group activities, and I always enjoyed adding fresh ideas to my repertoire [6]. When training a six-week class, I preferred to use icebreakers that allowed the group to share information about themselves and become more acquainted, as they had to spend a substantial amount of time together. It was my desire to create a safe and comfortable environment for everyone. For shorter trainings, such as a system update or a new product launch, the employees were already familiar with one another, so I typically had a quick game prepared for the group. My favorite was a simulated Jeopardy game that awarded prizes for correct answers. The fun atmosphere seemed to get staff engaged in the training, and it also helped with morale as they filtered back into the call center.

In late (redacted) established a customer service department separate from the sales center. I inherited most of the materials for new-hire training; however, the customer service training manual and all associated materials had to be created from scratch. I was charged with the task and enthusiastically accepted. Utilizing the same format as the updated new-hire manual, I created a training program that promoted positive customer interactions and advanced the skills of the service representative. The most difficult challenge in the developmental phase was ensuring the modules presented clear and applicable directives, but remained versatile enough to be relevant for myriads of customer grievances. Training was designed to encompass the technical components of problem solving and to equip the representatives with the soft skills necessary to provide overall customer satisfaction. Our call center averaged 3,000 calls per day, so I monitored hundreds of customer service calls and surveyed customers as part of the project planning and development.

While researching customer experiences and feedback, I recognized trends that evolved into a new module for both customer service and new-hire trainings. Customers were surveyed on the phone, online, and by returning a survey card that was included in the box with their product. As I collected information, I discovered regional patterns. Customers in the southern states were asking for service representatives to slow down and take more time to explain options and processes. Their feedback reflected an appreciation for friendly, conversational service representatives. Customers from other geographic zones (identified with area codes) reported they would prefer less of the pleasantries and wanted the

call to be quick, efficient, and conclude in two minutes or less. These customers, in areas in and around Los Angeles, New York City, New Jersey, Boston, and Philadelphia, had a high concentration of "the call took too long" comments. Because our representatives used phone numbers to access accounts, I knew we could accommodate our customers. The technology team and I worked together to update COMET, our database system, and changed the flow of the call based on the customer's area code. We added framing statements, upselling, and cross-selling functions for some area codes and eliminated them for others. As we progressed, we could flag accounts to notify the technology department to add or remove functions per customer feedback and ultimately improved customer relations. There was an immediate and considerable increase in customer service ratings. In 2004, we were pleased to learn that we were rated the number one call center in the nation for customer service satisfaction .

In **redacted**) and its parent company - were purchased by regularly sent company-wide emails that contained links to Corporation.

online training courses. This was not intended to replace classroom-style training, but to supplement the training schedule. These asynchronous-style courses were accessible from the workstation, required no planning or coordinating at the center level, and created little-to-no disruption to the call center. Employees could complete their online lessons between customer calls. Although this training was convenient and employees received certificates upon completion [7], there was nothing in place to measure how much of the

information was understood or retained, and there was no instructor available when there were questions about the content.

Eventually, the facility was scheduled for closure and call center operations were relocated to . I spent several weeks in training the trainers and their call center representatives on and products and services. To assist with my job search after closure, I was provided letters of recommendation [8], copies of my trainer evaluations [9], and performance reviews [10].

From **(redacted)** I worked as the Training Coordinator for [11]. is part of the Board of Developmental Disabilities, and its mission is to assist individuals with barriers in obtaining and retaining community employment. My role was multifaceted. I was responsible for new-hire training and staff development, preparing and delivering job skills training for individuals with disabilities, and writing training plans that were tailored to the individuals' needs, yet still met the needs of the hiring business. Many of the skills I acquired from working at [redacted] were transferrable when training staff, but certain challenges were unique to this position and required additional learning on my part. I enrolled in numerous courses to learn new approaches and techniques and familiarized myself with the resources that were available through local, state, and federal programs [12].

Government regulations and accreditation factors imposed specific records maintenance requirements. Although onboarding and staff development processes had many similarities, the public sector's policies and accreditation standards helped advance my records management skills because I had to prove that the training existed, occurred on or before an established date, and which staff participated [13].

One of most vital pieces of preparing for client-based training at was the intake process. The intake involved reading the client's Individualized Education Plan (IEP) and Individualized Service Plan (ISP), completing a needs assessment and interest inventory, and then meeting with the client to discuss possible matches for employment. Following the face-to-face interview, a final training plan was written. There were multiple ways in which a client could participate:

- One-on-one training (Personal Adjustment, Work Adjustment)
- Classroom-style training (Job Club, STARS)
- On-site training at a business of interest (Community Based Assessment, Job Tryout)
- Community and classroom combination (Discovery, Career Exploration)

As the training coordinator, I facilitated the intake process and wrote the training plans. Unlike having established coursework, I had to fully understand the results of the needs assessment before determining a training strategy. Once a plan was

formulated and a business was identified as a potential match, I worked with that business to arrange the client's work schedule and matched the client with the most compatible job trainer. It was also my responsibility to make sure the job trainer was thoroughly aware of the client's needs, the business's needs, the expected deliverables, and the desired outcomes.

I facilitated in-house training called [REDACTED] once per quarter for groups of individuals with barriers. This course was two hours per week for three weeks. A person was required to complete [REDACTED] because he or she was preparing to enter the workforce, received a poor performance evaluation at work, or was terminated for any reason. Training had to be tailored accordingly, so no two trainings were alike. I developed a library of lesson plans and used them fittingly. As I put together a new agenda each quarter based on the referrals I received, I pulled the lesson plan(s) that fit the needs of each participant. When a new lesson plan was created, it was added to the lesson library.

Through my previous experiences in the classroom, I learned to accommodate groups of men and women from different age groups and ethnic backgrounds that had varying levels of skillsets. I effectively managed personality conflicts, nonnative English speakers, and other differences among trainees. However, having a classroom filled with individuals with such differing abilities was especially demanding. Some trainees had an IQ in the 50-70 range, while others had no intellectual disabilities at all (Clients could also be referred for anxiety, depression, Obsessive Compulsive Disorder or any other diagnosis that was

determined to be the root cause of his or her inability to secure employment). Another layer to the already complex classroom dynamics was that training began at age 14 for students with IEPs, so my instructional techniques often included pedagogic strategies. There was value in using this method when training some of the adults who presented as well, based on their cognitive limitations and lack of formidable work experience.

Career Exploration and Discovery were part of the catalog of services and delivered structured exploration of numerous critical insights into behaviors, motivations, interests, fears and concerns, knowledge, abilities, receptiveness and responses to directives, goals, and more. I provided these services directly, trained other trainers to deliver the services, and developed reporting protocol.

had more than 70 individuals with disabilities employed in in over 50 different local businesses . It was important to keep them enthusiastic about work. Clients would often experience a reduction in benefits when they became gainfully employed. Others had to be absent from community programs that they had grown accustomed to attending. Consequently, some workers became confused or discouraged about the true benefits of community employment. I developed a training called , which stood for Achievement, and Recognition. The objectives were to promote inclusion in the workforce, address training needs, recognize outstanding work in the presence of peers, and provide an opportunity for socialization. ■■■■■

became an integral part of the _____ training initiative, and I received state and national awards for the program design and _____ implementation [14].

The recognition of our training programs coupled with the reputation and success of _____ as an agency allowed me to broaden my audiences. I co-created _____ and facilitated that training at the _____ Conference in **20W** [15]. In **20a** I developed a training called _____ and presented at the National Associations for Persons Supporting Employment First (APSE) Conference in _____ Preparing to train other professionals for these and other similar trainings inspired me to think more innovatively about my presentations. I learned to use the presentation software Prezi. I was experienced in the art of making training and promotional videos, so I embedded musically charged, upbeat training videos into vibrant, visually appealing Prezis. The software allowed for seamless transitions, and the effectiveness of the delivery was echoed in the reviews we received after each session.

Training evaluations were always important to me. I encouraged all participants to provide as much feedback as possible. If a disability prevented a participant from completing an evaluation on his or her own, I made accommodations. I strived to follow up with trainees who felt they needed more information or clarification and made enhancements to my material when necessary.

_____ customers also included business partners and vendors, so those

customers were surveyed as well. It was my goal and priority to improve and optimize training, and surveys and evaluations were key to achieving that [16].

The Importance of Training

Poor training or a lack of training can speak volumes about management's level of appreciation for and investment in their staff. The consequences of deficient training can affect production, service delivery, and morale, while the cost of attrition could potentially far outweigh the cost of an adequate training program. Conversely, a sound training program can have a positive impact on every level of a business or organization. One of the most profound messages I delivered through training was that every person mattered - and so did every job. At times, I trained individuals with disabilities whose career goals were to become a janitor or a dishwasher. It was important to me as a trainer that all individuals understood their value. I asked, "Would a doctor perform a procedure in a filthy room? Would a chef want his meal served on dirty dishes?" My training reiterated the importance of every person and every job because I believe when a person feels valued, they are more likely to buy into the mission and vision of the company, hold themselves to a higher performance standard, and become entrenched in the team atmosphere. It is my opinion that a solid training program leads to a positive workplace culture and is one of the strongest contributors to profitability, as having a skilled staff is great for any business.

COMS 4510 Instructional Training and Development in Communications

Supporting Documentation

- [1] - Job Description
- [2] Pre-Training Checklist
- [3] Learning Services Training Agenda/Table of Contents
- [4] (a) [REDACTED] Instructional Techniques
 - (b)- Application Methods
 - (c) Presentation Methods Principles
- [5] of Adult Learning Group
- [6] Activities and Icebreakers
- [7] Training Certificates.
- [8] Letters of Recommendation
- [9] Training Evaluations
- [10] Performance Review
- [11] Job Description
- [12] Training Certificates
- [13] Training Department Orientation Checklist
- [14] Information and Awards
- [15] Photo: Presenting Keys
- [16] [REDACTED] Surveys

██████ Inc.
Job Description

Job Title: Corporate Trainer/Training Coordinator
Department: Learning and Organizational Development (L&OD)
Reports To: Director of L&OD
FSLA Status: EXEMPT
Job Code: 30
Division: Inc.
Location: redacted

SUMMARY

Develop, implement, facilitate and monitor training programs in order to meet or exceed objectives in the areas of sales, service, order quality, productivity and cost management

ACCOUNTABILITIES

- Coordinates training for call center representatives and field sales representatives
- Directs the responsibilities of the training support staff
- Provides leadership by effectively communicating information, establishing expectations, linking individual goals and company objectives to the L&OD departments and supports a positive work environment.
- Recognizes contributions, ensures employees are prepared and competent and have the tools and information necessary to be successful
- Continually analyzes department results for trends in performance and develop plans to take training initiatives as required to meet or exceed goals in sales, service, quality, productivity and cost management.
- Keeps abreast of best practices and technologies
- Facilitates core training courses: Customer Service, Sales, New Hire, Interpersonal Business Communications, Quality Practices, COMET; and develops additional training as needed.
- Coordinates and conducts calibration sessions among leadership staff to ensure performance evaluations and procedures are consistent.
- Assists in hiring by assessing candidate capabilities, interviewing and preparing recommendations.
- Monitors, evaluates and provides performance feedback to staff.
Leads and/or participates in cross-divisional teams
- Designs programs and maintains Standard Operating Procedures manual.

REQUIREMENTS

- Exceptional communication skills, both verbal and written
- Ability to effectively facilitate courses with up to 150 attendees
- 5-10 years in sales and customer service with direct reports
- Excellent computer skills
- Ability to prepare training documentation, job aids, presentations and establish testing certification standards for employment
- Bachelor's degree required; Master's preferred

Systems, Inc. Pre-Training Checklist

All new-hire paperwork has been turned into HR.

All new-hires have been notified of start date and schedule.

Training manuals have been updated and prepared for current class.

Trainer has email addresses, user IDs and passwords for all new-hires .

The classroom is clean and free of items that do not belong there. No clutter!

Lighting and temperature appropriate in classroom.

There are an adequate number of computer stations for the number of trainees expected .

Each computer station has a training manual, pen, notepad, name badge, and welcome gift .

HR has confirmed that accommodations are/are not needed for trainee(s). If yes,

accommodations made: All computers are on and set to training mode.

Facilitator's monitor is projecting onto the screen.

DVD is set up to project onto the screen .

Laser pointer works/has batteries .

Flip chart and markers are in the front of classroom.

Handouts and training aids are printed and ready for distribution.

Training videos are ready - *FISH Philosophy, Phone Doctor*.

Guest speakers are scheduled and have been notified of their date/time.

Mentors are assigned and introductions are scheduled.

Facility tour is sche duled.

Sample products are set up and in order.

Cubicles are assigned, cleaned and ready for new sta ff.

Voicemail set up instructions and at each new desk.

IT scheduled for ergonomics assessment for each new CSR.

Signature

Date

TRAINING MANUAL DEVELOPED (pages that follow)

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Introduce
Session

Objective

- The learners will greet customers

Benefits

- Make customers feel welcome, customer satisfaction, return customers, ties
- Relate a personal example and statistics

Overview

- Demonstrate how to greet customers
- Practice with a role-play
- Feedback on what you did well and what can be improved

~~Learning Strategy~~

Present
Content

Content

Visuals

Examples

Questions

Summaries

Methods

Administer
Application

Clear Instructions

Monitor
Performance

Interim Guidance

Provide
Feedback

Observations

Did Well

Could Improve

Tips to Improve

Summarize
Session

Key Points

Presentation Methods

Behavior Modeling (P and A)

A technique in which desirable behavior is shown to the trainees. The behavior is then analyzed and studied. Then follows an opportunity for trainees to try out and practice the behavior with guidance and feedback. Used commonly in interpersonal skills and communication training.

Brainstorming (P)

A freewheeling technique to generate ideas. Phase one requires a creative, spontaneous flow of suggestions without any judgment or evaluation of the suggestions. Phase two involves more careful analysis to explore the ideas and evaluate their usefulness.

Buzz Group (P)

A large group is subdivided into smaller groups for a quick discussion. All groups meet simultaneously for 5-10 minutes to react to a topic, generate ideas or questions, discuss an issue, etc.

4. Coaching (P and A)

A one-on-one process in which intensive learning occurs via demonstration and practice followed by guidance and feedback. Usually takes place on the job.

5 Colloquy (P)

A modified version of a panel involving four to eight people. Half the panel represents the trainees and the other half are resource people or experts. The trainee representatives ask questions, raise issues and make comments for the experts to respond to.

Committee (P and A)

A smaller group is drawn from a large group of trainees to handle a project or assignment that can't be handled efficiently by the large group. There may be more than one committee working at the same time. Each committee reports back to the larger group for direction and feedback.

7. Conference (P)

A number of different presentations are available for the learners to choose from. Generally the people at each session share a common problem or need.

8. Debate (P)

Two trainees or teams of trainees defend opposite sides of an issue. Trainees alternate in presenting their arguments. The purpose is to explore all aspects of an issue and also emphasizes winning.

9. Demonstration (P)

Trainees observe the performance of a task or procedure. The demonstration may be live or pre-recorded.

10. Dialogue (P)

Two individuals hold a conversation while the trainees observe. The individuals in dialogue may be resource people or selected trainees. They may either present opposing views or simply discuss the issue in an informed manner.

11. Discussion (P)

An exchange of ideas on a topic of mutual concern. The discussion can be leaderless or moderated by a leader. It can be totally unstructured and spontaneous or it can be highly structured.

12. Expanded Panel (P)

This is a panel with a vacant chair. Trainees can temporarily take the vacant chair in order to participate briefly in the panel discussion. When they have had their say, they vacate the chair so another trainee can occupy it.

13. Field Trip (P)

Trainees are taken to the environment where the task is performed. The trip is carefully planned for learning through observation and analysis of what is observed. (This is not just a casual tour.)

14. Fishbowl (P and A)

A modification of the discussion in which a large group is divided into two smaller groups. The "inner" circle discusses an issue or does an exercise while the "outer" circle observes and then offers observations or feedback.

15. Forum (P)

Following a formal presentation, trainees discuss and ask questions about the topic. They may ask questions of the speaker or discuss among themselves. For larger groups, a moderator may be needed.

16. Instruments (P)

Trainees fill out questionnaires, checklists, etc. either to gain insight about themselves or explore a topic.

17. Interview (P)

Trainees are given an opportunity to interview and question a resource person. Sometimes the interview is conducted by someone else and the learners simply observe.

18.. Job Instruction Training (P and A)

Also called on-the-job training. This consists of a formal step-by-step procedure for conducting training in the workplace.

19. Lecture (P)

A prepared oral presentation by a qualified speaker.

20. Lecturette (P)

A very brief oral presentation usually requiring only a few minutes - an attempt to overcome some of the weaknesses of formal lectures. These are usually interspersed throughout a course.

21. Listening Team (P)

A group of trainees is assigned to listen to a speaker, take notes, prepare questions, and then summarize a session. They may also be allowed *to* question the speaker. Several listening teams can each focus on a different aspect of the session and report their observations and conclusions.

22. Marathon (P)

Trainees stay in the learning environment continually for an extended period of time. Usually done in a secluded spot to minimize distractions and allow intense concentration on the objectives of the session. Usually reserved for interpersonal skills, personal learning and self-assessment.

23. Neighbor Discussions (P)

A quick method to create participation and activity by trainees. They are asked to speak to the person beside them for a few minutes to discuss an issue, answer a question or generate questions to ask.

24. Panel (P)

A discussion among a group of experts takes place while trainees observe. Sometimes trainees ask questions after the panel has spoken. Often requires a moderator to direct the flow.

25. Peer-Assisted Learning (P and A)

Trainees help each other learn under the guidance of a group leader. They may do exercises together and give each other feedback. Also used to give advanced trainees an opportunity to help their less advanced peers.

26. Question and Answer (P)

A method in which the leader covers course content by asking a series of questions. Also reversed in which the trainees are asked to generate and ask questions in order to learn about the subject.

27. Reaction Team (P)

A group of two to five trainees is selected to react to a speaker's presentation by asking questions or making comments. They may be allowed to interrupt to seek immediate clarification.

28. Reading (P)

Trainees are assigned materials to read in order to cover course content or prepare for a group session.

29.-Reflection (P)

Trainees are given time alone to review and think about what has been learned, assess its applicability, or think about how to make it work in their setting.

30. Seminar (P)

A participatory method in which trainees are expected to have good background in the topic and work together as equals. Often starts with a leader giving a brief presentation, and then acting as a resource person while the trainees are responsible for directing their own efforts.

31. Sensitivity Training (P)

A rather intense interpersonal experience in which trainees interact together to learn about their own behavior and feelings. A highly specialized method that often comes close to being a form of mild therapy.

32. Skit (P)

A short, dramatic presentation that is carefully prepared and rehearsed to illustrate principles or provide material for analysis and discussion.

33.Slip Writing (P)

A quick method of generating questions from trainees by asking everyone to write their main question on paper and pass it to the leader. The leader then reads all the questions to the group and either answers or refers questions back to the group. Can be used any time a learner wishes to ask a question anonymously.

34.Study Guide (P)

Materials that provide a map for the trainees to follow in learning a subject. It can include many types of activities and materials. Can be used individually or in groups.

35. Symposium (P)

A series of brief lectures on related topics are presented by resource people. Each speaker presents only one aspect of the topic. A moderator often summarizes. Sometimes trainees ask questions afterward. A rather structured, formal method.

36. Tutorial (P and A)

A one-on-one process in which a skilled person assists an unskilled person to learn via demonstration and practice followed by guidance and feedback. It takes place in a training environment rather than on the job. The skilled person can either be the leader or an advanced trainee.

37. Vestibule Training (P and A)

A private place is set aside in the work area to allow training in an off-line but highly realistic environment. Designed to bring the trainee up to standard quickly before allowing on-line production. This is basically a compromise between classroom and on-the-job training. Usually a form of individualized learning.

38. Workshop (P and A)

A highly participative session that puts greater emphasis on trainee application than on presentations by the leader. Trainees work to produce a product or solve a problem with guidance from a leader.

Pr 133 Practice Exercise on Application Methods

Application Methods

1. Action Maze (A)

A variation of the case study in which trainees solve a problem or case by making decisions. Their decisions determine what they will see next. The consequences of their decisions provide trainees with insight and feedback.

2. Behavior Modeling (P)

A technique in which desirable behavior is shown to the trainees. The behavior is then analyzed and studied. Then follows an opportunity for trainees to try out and practice the behavior with guidance and feedback. Used commonly in interpersonal skills and communication training.

3. Case Study (A)

A written or oral account of a situation is given to the trainees. Either individually or in groups, the trainees are asked to analyze the case and present recommendations.

4. Clinic (A)

Trainees meet to analyze and treat a specific problem or react to a problem they have encountered.

5. Coaching (P and A)

A one-on-one process in which intensive learning occurs via demonstration and practice followed by guidance and feedback. Usually takes place on the job.

6. Committee (P and A)

A smaller group is drawn from a large group of trainees to handle a project or assignment that can't be handled efficiently by the large group. There may be more than one committee working at the same time. Each committee reports back to the larger group for direction and feedback.

7. Critique (A)

Trainees analyze the strengths and weaknesses of a subject, system, approach, proposal, etc. They then make suggestions for improvements.

8. Critical Incident (A)

A variation of the case study in which trainees are given incomplete data. By analyzing the case and asking the right questions, they are given additional data needed to solve the case.

9. Drill (A) A session of repetitive practice designed to increase efficiency, improve the quality of performance or aid retention.

10. Game (A)

An exercise in which competition or cooperation (or both) are used to practice principles learned previously. It is usually intended to be fun.

11. Fishbowl (P and A)

A modification of the discussion in which a large group is divided into two smaller groups. The "inner" circle discusses an issue or does an exercise while the "outer" circle observes and then offers observations or feedback.

12. In-basket (A)

Prepared items are given to the trainees as if arriving in their in-baskets. Trainees must prioritize, make decisions, handle any difficulties, respond to time deadlines and pressure, etc. in order to get the workload completed.

13. Job Instruction Training (P and A)

Also called on-the-job training. This consists of a formal step-by-step procedure for conducting training in the workplace.

14. Laboratory (A)

A training site is set up which allows experimentation and testing by trainees. This can be done for technical and scientific training but also for human relations and complex behavioral programs.

15. Marathon (P and A)

Trainees stay in the learning environment continually for an extended time. Usually done in a secluded spot to minimize distractions and allow intense concentration on the objectives of the session. Usually reserved for interpersonal skills, personal learning, and self-assessment.

16. Mental Imagery (A)

A process of relaxing and imagining yourself performing a task properly. Repeated mental rehearsal is a supplement or replacement for actual practice.

17. Mini-Case (A)

A modification of the case study in which a brief situation is described to the trainees who discuss how the case should be handled. Characterized by only key facts being presented and by brevity in discussion. Often used to give examples of situations and procedures.

18. Practice Exercise (A)

Trainees are given an assignment to practice performing a task. Can be used for any type of task.

19. Peer-Assisted Learning (P:ml A)

Trainees help each other learn under the guidance of a group leader. They may do exercises together and give each other feedback. Also used to give advanced trainees an opportunity to help their less advanced peers.

20. Quiz (A)

A method of assessing learning or giving practice by filling out a questionnaire or test. Can also be oral.

21.. Role Play (A)

Trainees enact a situation in order to try out new skills or apply what has been learned. Usually used for interpersonal and communications skills. It has many variations including:

1. Confrontation - in which the trainee is confronted by another person and must answer questions, handle problems, provide satisfaction, solve a complaint, etc.
2. Consultation - in which the trainee tries to help a client solve a problem.
3. Court Techniques - in which a situation or person is "tried" as trainees work out the consequences of a mishandled task.

Formats for role playing include:

1. Doubling - in which another player stands behind the role player and acts as an alter ego to expand upon or reveal feelings not expressed by the player.
2. Monodrama - in which there is only one role and the player gives a monologue while trainees observe.
3. Multiple - in which a number of separate role plays occur at the same time in various parts of the room.
4. Role Reversal - in which the players assume the roles of others whom they normally interact with on the job.
5. Role Rotation - in which the role play is stopped briefly so that players can trade roles before continuing.
6. Soliloquy - in which the role play is stopped briefly so that one or more players can be interviewed.

22. Simulation (A)

The training environment is set up to allow the learners to practice a task under very job-like conditions. May include equipment simulation or situational simulation. Often used as a blanket term for any realistic, job-like exercise, such as role plays and case studies can be categorized as simulations.

23. Syndicates (A)

Trainees are subdivided into small groups of three to six people to perform an assigned task as a team.

24. Tutorial (P and A)

A one-on-one process in which a skilled person assists an unskilled person to learn via demonstration and practice followed by guidance and feedback. It takes place in a training environment rather than on the job. The skilled person can either be the leader or an advanced trainee.

25. Vestibule Training (P and A)

A private place is set aside in the work area to allow training in an off-line but highly realistic Environment-. Designed to bring the trainee up to standard quickly before allowing on-line production . This is basically a compromise between classroom and on-the-job training. Usually a form of individualized learning.

26. Workshop (P and A)

A highly participative session that puts greater emphasis on trainee application than on presentations by the leader. Trainees work to produce a product or solve a problem with guidance from a leader.

Principles of Adult Learning

1. Adults bring considerable experience with them. Therefore, they wish to speak, participate and contribute to the proceedings. They dislike long lectures and one-way communication.
2. Adults have something to lose. They have a strong need to maintain their self-esteem. Therefore, they should be listened to and we should set up the course so they will be successful.
3. Adults want courses that focus on real-life problems and tasks rather than academic material. A strong how-to focus is desired. They become restless if they feel their time is being wasted.
4. Adults see learning as a means to an end rather than an end in itself. They must know what there is to gain and they must see progress being made.
5. Adults have a here-and-now viewpoint and wish to focus on current issues rather than material that may be useful in the distant future.
6. Adults are accustomed to being active. They should be given an opportunity for active participation whenever possible.
7. Adults are accustomed to being self-directing. They have expectations and wants to be met. Instructors must consult and work with other adults rather than be too directive. /h.1.

NOTE:

These principles are applicable to any age group but adults feel them to a greater degree .

give test Before training (keep for themselves)
(- qual for training also)

life is what happens to us while we are making other plans.

Thomas La Mance

Appendix

Small Group Activities

1. Find opportunities for people to work in small groups, such as sharing their action plans, developing a list of common problems, or discussing adaptations for specific work situations.
2. Use icebreakers that involve learning other people's names before starting small group exercises. (Learners who sit at the same computer station throughout the training may only know the names of the people in their immediate vicinity.)
3. Make sure that learners must physically move to different locations for at least some of the small group activities. A different physical position can give the learners a different mental perspective.
4. For a quick peer review or neighbor discussion, have learners team up with those in the row immediately in front of or behind them.
5. Assign learners to groups and give all instructions for the exercise before they move into their groups. You may not be heard over the noise once the participants start moving.
6. Spell check and correct errors. Don't worry about fonts being different within a word or sentence or section. The screen reader will not notice and will read it just the same.

Appendix

Favorite Icebreakers

Hundreds of icebreakers have been described in books and articles. Here are some popular ones:

1. Partner Introductions

- Ask each person to select a partner who is a stranger to them.
- Give ten minutes for partners to interview each other and find out **as** much about each other as possible.
- Suggest they take notes during interviewing.
- After the interviews, ask each person to stand in turn and introduce their partner to the entire group. (Encourage them to refer to their notes freely.)

NOTE:

This icebreaker works best with smaller groups of fewer than 20. For larger groups, it is too time-consuming.

2. Cocktail Party

- Use this icebreaker with larger groups.
- Ask people to circulate and speak to one person at a time to get acquainted.
- After one minute, announce "CHANGE" and have everyone find a new person to get acquainted with for one minute.
- Continue changing every minute until there have been opportunities for people to meet most of the others. (Expect that people won't meet everyone else, but they should meet most of the group.)

3. Common Ground

- Use this icebreaker for small groups of four to six people, or for each small group sitting together as a team.
- Give the groups a specific time (e.g. five minutes) to list everything they can find that they all have in common. Tell them to avoid the obvious such as "We're all taking this workshop."
- Ask them to write out their lists.
- After the time is up, ask each group how many items they have in their list.
- For fun, ask them to announce some of the most interesting items in their lists.

Appendix

4. True and False

- Use this icebreaker for small groups of four to six people, or for each small group sitting together as a team.
- Ask each person in the group to list four facts about themselves on paper. Three of those facts should be true and one should be false.
- One person in the group begins by reading their four items out loud to the others.
- The group then tries to guess which fact is false.
- All other group members read their four items in turn until everyone is finished.

There are many types of icebreakers described in the literature. Our favorites are simple activities in which people get acquainted with others.

Certificate of Completion for Financial Reporting Class

This . will certify that

STEPHANIE

successfully completed

Your Responsibilities for Financial Reporting
course from the **Ethics and Compliance Training**
onQB/22...

Certified by

LRN, The Legal Knowledge Company™

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Certificate of Completion

This will certify that

STEPHANIE

successfully completed

Privacy Issues

course from the Ethics and Compliance Training

on 08/22,...

Certified by

LRN, The Legal Knowledge Company™

Certificate of Completion for Ethical Leadership Class

Certificate of Completion

This will certify that

STEPHAN/E

successfully completed

Ethical Leadership

course from the Ethics and Compliance Training

on 10/11/11 11:11:11

Certified by

LRN, The Legal Knowledge Company

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Certificate of Completion for What You Can Ask in an Interview Class



Certificate of Completion

This will certify that

STEPHANIE-

successfully completed

What You Can Ask in an Interview

course from the Ethics and Compliance Training

on 10/11/..

Certified by

LRN, The Legal Knowledge Company™



Certificate of Completion

This will certify that

STEPHANIE

Successfully completed

Deluxe Ethics and Compliance Program
course from the Ethics and Compliance Training
on **10/11**

Certified by

LRN, The Legal Knowledge Company™

Certificate of Completion for Protecting Company Trade Secrets Class

Certificate of Completion

This will certify that

STEPHANIE successfully

completed

Protecting Company Trade Secrets
course from the Ethics and Compliance Training

on **10 /24**

Certified by

LRN, The Legal Knowledge Company rn



Certificate of Completion for Record Retention Policies Spotting the Issues Class

Certificate of Completion

This will certify that

STEPHANIE

successfully completed

Record Retention Policies: Spotting the Issues
course from the Ethics and Compliance Training

on **10/24/**

Certified by

LRN , The Legal Knowledge Company

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Letter of Recommendation

February 15,...(year redacted)


Dear Hiring Manager,

This is a personal letter of recommendation for Stephanie- I have worked with Stephanie for the last five years; she is a friend, respected co-worker and mentor. I have seen Stephanie's professionalism in action as a Customer Service Representative and as a Trainer for our corporation. Stephanie has many great skills to offer any company and you would be very fortunate to have her as a leader in your organization.

Stephanie has always exhibited an infectious enthusiasm and a high level of energy that has kept our staff exceeding the expectations set before them. As a Trainer she is very focused on goals, shows natural leadership ability and is an independent thinker. Our representatives trained under Stephanie have been able to perform well above the goals set for new employees. Stephanie has implemented several new programs within our company that has made us all more profitable, while far exceeding in customer satisfaction. I cannot say enough about the character, judgment, and most of all devotion she shows in her everyday duties.

I would be happy to speak with you if you have any specific questions about Stephanie's new role in your organization. Feel free to contact me at the number show below for any additional information you may need.

Very truly yours,


Team Leader/ Training Resource Specialist
(740)

Letter of Recommendation

Dear Hiring Manager,

This is a letter of reference for Stephanie I have worked alongside of and have been a participant of several programs, presentations and training seminars facilitated by Stephanie. She creates a comfortable and enjoyable atmosphere, provides helpful materials along with clear instruction, and has a remarkable ability to keep participants engaged in the learning process.

As a Trainer at Stephanie listened to the staff and talked with customers to determine how our center could reach new levels of success. She formulated a program, which ultimately improved our customer ratings, increased sales and reduced employee turnover.

Stephanie demonstrates exceptional leadership skills. She will take responsibility for learning all she can about her position and will exceed all expectations.

Please contact me with questions.

Sincerely,



Chriss 

Letter of Recommendation

February 15, (year redacted)

RE: Stephanie

Dear Hiring Manager:

This is a personal letter of recommendation for Stephanie

I've known Stephanie casually for the past several years and worked very closely with her for the last 2 years.

Stephanie is currently employed in a training capacity within our organization. I feel her personality and skills are very well suited to this role. She is a people-person, relating well to all types of individuals whether in a classroom or a one-on-one setting. Stephanie takes great pride in ensuring those she trains are fully prepared to begin their jobs and she does what it takes to make certain this is the case. Her communication skills, both verbal and written, are excellent. She is a great contributor to our team, consistently adding value to our discussions and direction.

She sets high standards for her performance and works hard to exceed her goals .

I personally think any company she chooses to work for would be very fortunate to have her as an employee.

I would be happy to speak with you further if you have specific questions about Stephanie's fit within your organization. Please feel free to contact me at the number shown below for additional information.

Sincerely,


Sandra

Training Evaluation 1—with overall good ratings


To ensure your success **We are** committed to providing you, *our 'customer*, with the highest quality training materials and instruction. So we may continue to improve this process, please take a moment to complete the survey below.

The Courseware Inform		3	2	1
Content was useful and practical	4.5	3	2	1
Course objectives were achieved	4.5	3	2	1
Courseware was easy to follow	4.5	3	2	1
Exercises were effective in reinforcing skills	4.5	3	2	1

Q. Instructor: Stephen		3	2	1
Prepared the class met my expectations	4.5	3	2	1
The pace of the class was	4.5	3	2	1
Presented the material clearly	4.5	3	2	1
Answered questions effectively	4.5	3	2	1
Overall training experience	4.5	3	2	1
Used time effectively	4.5	3	2	1

Please use the space below to list any additional comments or suggestions for how we could improve future training. We value your feedback.

Training

Name: 

Department: _____

Date: _____

Training Evaluation 2—with overall good ratings

To ensure your success at _____ we are committed to providing you, *our customer*, with the highest quality training materials and instruction. So we may continue to improve this process, please take a moment to complete the survey below.

The Courseware Information	Strongly Agree	Agree	Disagree	Strongly Disagree	For Ratings Of "Disagree" OR "Strongly Disagree"; please provide specific improvement areas/ideas
Content was useful and practical	4	3	2	1	
Course objectives were achieved	(4)	1	2	1	
Courseware was easy to follow and use	4	(J)	2	1	
Exercises were effective in reinforcing skills)	3	2	1	

The Instructor - Stephani	Strongly Agree	Agree	Disagree	Strongly Disagree	For Ratings of "Disagree" or "Strongly Disagree", please provide specific improvement areas/ideas
Prepared		3	2	1	
Knowledgeable		3	2	1	
Presented the material clearly	4)	3	2	1	
Answered questions effectively		3	2	1	
Encouraged participation	V	3	2	1	
Used time effectively)	3	2	1	

Overall Assessment	Excellent	Very Good	Fair	Poor	For ratings of "Fair" or "Poor", please provide specific improvement areas/ideas
How well the class met my expectations	4	3	2	1	
The pace of the class was			2	1	
My Mentor was	(.4)	3	2	1	
The Instructor(s) was	W	3	2	1	
Overall Training Experience	11.4)	3	2	1	

Please use the space below to list any additional comments or suggestions for how we could improve future training.

g. We value your feedback.

Stephani made the class very interesting + fun. The 4 weeks have flown by. I feel confident, I didn't think I would in the beginning. I really enjoyed the training + will miss it.

Name:

Department:

Date:



Training Evaluation 3-with overall good ratings

To ensure your success at _____ we are committed to providing you, *our customer*, with the highest quality training materials and instruction. So we may continue to improve this process, please take a moment to complete the survey below.

The Courseware Information	Strongly Agree	Agree	Disagree	Strongly Disagree	For Ratings of "Disagree" or "Strongly Disagree", please provide specific Improvement areas/Ideas
Content was useful and practical	14)	3	2	1	
Course objectives were achieved		3	2	1	
Courseware was easy to follow and use	41	3	2	1	
Exercises were effective in reinforcing skills	4)	3	2	1	

The Instructor - Stephanie	Strongly Agree	Agree	Disagree	Strongly Disagree	For Ratings of "Disagree" or "Strongly Disagree", please provide specific Improvement areas/ideas
Prepared	4)	3	2	1	
Knowledgeable	4)	3	2	1	
Presented the material clearly	4)	3	2	1	
Answered questions effectively	4)	3	2	1	
Encouraged participation	4)	3	2	1	
Used time effectively	4)	3	2	1	

Overall Assessment	Excellent	Very Good	Fair	Poor	For Ratings of "Fair" or "Poor", please provide specific Improvement areas/Ideas
How well the class met my expectations	4)	3	2	1	
The pace of the class was		3	2	1	
My Mentor was	4)	3	2	1	
The Instructor(s) was	4)	3	2	1	
Overall Training Experience	4)	3	2	1	

Please use the space below to list any additional comments or suggestions for how we could improve future training. We value your feedback.

Stephanie
 understand. I like the way she was doing her sheets to help me understand
 work for the and was after going through
 confident about going on the floor

Name: _____

Training Evaluation 4—with overall good ratings

To ensure your success at we are committed to providing you, *our customer*, with the highest quality training materials and instruction. So we may continue to improve this process, please take a moment to complete the survey below.

The Courseware Information	Strongly Agree	Agree	Disagree	Strongly	For Ratings of "Disagree" or "Strongly Disagree", please provide specific Improvement areas/ideas
Content was useful and practical	4	3	2	1	
Course objectives were achieved	(4)	3	2	1	
Courseware was easy to follow and use	4	{3}	2	1	
Exercises were effective in reinforcing skills	C.4)	3	2	1	

The Instructor - Stephanie	Strongly Agree	Agree	Disagree	Strongly Disagree	For Ratings of "Disagree" or "Strongly Disagree", please provide specific Improvement areas/ideas
Prepared	4)	3	2	1	
Knowledgeable		3	2	1	
Presented the material clearly	4)	3	2	1	
Answered questions effectively	4)	3	2	1	
Encouraged participation	4)	3	2	1	
Used time effectively	4)	3	2	1	

Overall Assessment	Excellent	Very Good	Fair	Poor	For ratings of "Fair" or "Poor", please provide specific improvement areas/ideas
How well the class met my expectations	4)	3	2	1	
The pace of the class was	4	3	2	1	
My Mentor was	4	3)	2	1	
The Instructor(s) was	(4)	3	2	1	
Overall Training Experience		3	2	1	

Please use the space below to list any additional comments or suggestions for how we could improve future training. We value your feedback.

JA, dcu-01

was a great experience. Steph was very prepared, very nice & helpful! once she made me feel out of place or uncomfortable. One writer are somewhat missing, once the entry process began it is somewhat overwhelming trying to keep up of what you can & cannot have. But she would answer any question we had.

Training Evaluation 5—with overall good ratings

To ensure your success at _____ we are committed to providing you, *our customer*, with the highest quality training materials and instruction. So we must continue to improve this process, please take a moment to complete the survey below.

The Courseware Information	Strongly Agree	Agree	Disagree	Strongly Disagree	For Ratings of "Disagree" or "Strongly Disagree", please provide specific improvement areas/ideas
Content was useful and practical	(4)	3	2	1	
Course objectives were achieved	4	(3)	2	1	
Courseware was easy to follow and LJS	(4)	3	2	1	
Exercises were effective in reinforcing skill/s	(4)	3	2	1	

Instructor Step, list	Strongly Agree	Agree	Disagree	Strongly Disagree	For Ratings of "Disagree" or "Strongly Disagree", please provide specific improvement areas/ideas
Prepared		3	2	1	
Knowledgeable	(4)	3	2	1	
Presented the material clearly	((4))	3	2	1	
Answered questions effectively	(1)	3	2	1	
Encouraged participation	(4)	3	2	1	
Used time effectively	(4)	3	2	1	

Overall Assessment

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree	For Ratings of "Disagree" or "Strongly Disagree", please provide specific improvement areas/ideas
How well the class met my expectations	4	2	1		
The pace of the class was	4	(3)	2	1	
My Mentor was	4	(3)	2	1	
The Instructor(s) was		3	2	1	
Overall Training Experience	IV	3	2	1	

Please use the space below to list any additional comments or suggestions for how we could improve future training. We value your feedback.

Name: _____ **Department:** _____ **Date:** _____

instruction. So, we may continue to improve this process, please take a moment to complete the survey below. To ensure your success at... we are committed to providing you, our customer, with the highest quality training materials and

The Courseware Information	Strongly Agree	Disagree	Strongly Disagree	For Rating of "Disagree" or "Strongly Disagree", please provide specific improvement areas/Ideas
Content was useful and practical	14	3	2	1
Course objectives were achieved	4	(3)	2	1
Courseware was easy to follow and use	4	(3)	2	1
Exercises were effective in reinforcing skills	4	(?J)	2	1

The Instructor: Stephani E...	Strongly Agree	Disagree	Strongly Disagree	For Ratings of "Disagree" or "Strongly Disagree", please provide specific improvement areas/Ideas
Prepared	4	3	2	1
Knowledgeable	4	3	2	1
Presented the material clearly	4	3	2	1
Answered questions effectively	4	3	2	1
Encouraged participation	4	3	2	1
Used time effectively	4	3	2	1

Overall Assessment	Very Good	Fair	Poor	For Rating of "Fair" or "Poor", please provide specific improvement areas/Ideas
How well the class met my expectations	3	2	1	
The pace of the class was	3	2	1	
My Mentor was	3	2	1	
The Instructor(s) was	3	2	1	
Overall Training Experience	3	2	1	

Please use the space below to list any additional comments or suggestions for how we could improve future training. We value your feedback.

CS- 1 A " D 1 \L\Jeto Bt\5L.f. YeE:LSH'S DID
 A \ 6C-.GU.f1'JT 1J:c:12 ,.AA@ "I. 1:-\AvG NO Sll6 r sn D\J.S fDR It:JJm)J(mP1Jt

Training Evaluation 7—with overall good ratings

To ensure your success at _____ we are committed to providing you, *our customer*, with the highest quality training materials and instruction. So we may continue to improve this process, please take a moment to complete the survey below.

The Courseware Information	Strongly Agree	Agree	Disagree	Strongly Disagree	For Ratings of "Disagree" or "Strongly Disagree", please provide specific improvement areas/ideas.
The Instructor: Stephanie					
Content was useful and practical	4	3	2	1	
Course objectives were achieved	4	3	2	1	
Course was easy to follow and use	4	3	2	1	
Exercises were effective in reinforcing skills	4	3	2	1	
Answered questions effectively	4	3	2	1	
Encouraged participation	4	3	2	1	
Used time effectively	4	3	2	1	
Overall Assessment	Excellent	Very Good	Fair	Poor	For Ratings of "Fair" or "Poor", please provide specific improvement areas/ideas
How well the class met my expectations	4	3	2	1	
The pace of the class was		3	2	1	
My Mentor was	4	3	2	1	

The Instructor(s) was	4	3	2	1
Overall Training Experience	4	3	2	1

Name: _____ Department: _____

Date: _____ 1

Revised December 4, 2003

Training Evaluation 8—with good overall ratings

To ensure your success at _____ we are committed to providing you, *our customer*, with the highest quality training materials and instruction. So we may continue to improve this process, please take a moment to complete the survey below.

The Courseware Information	Strongly Agree	Agree	Disagree	Strongly Disagree	For Ratings of "Disagree" or "Strongly Disagree", please provide specific Improvement areas/Ideas
Content was useful and practical	4	3	2	1	
Course objectives were achieved	4	3	2	1	
Courseware was easy to follow and use	4	3	2	1	
Exercises were effective in reinforcing skills	4	3	2	1	

The Instructor - Stephanie	Strongly Agree	Agree	Disagree	Strongly Disagree	For Ratings of "Disagree" or "Strongly Disagree", please provide specific Improvement areas/Ideas
Prepared	4	3	2	1	
Knowledgeable	4	3	2	1	
Presented the material clearly		3	2	1	
Answered questions effectively	4	3	2	1	
Encouraged participation	4	3	2	1	
Used time effectively	4	3	2	1	

Overall Assessment	Excellent	Very Good	Fair	Poor	For Ratings of "Fair" or "Poor", please provide specific Improvement areas/Ideas
How well the class met my expectations	4	3	2	1	
The pace of the class was	4	3	2	1	
My Mentor was	4	3	2	1	
The Instructor(s) was	4	3	2	1	
Overall Training Experience	4	3	2	1	

Please use the space below to list an additional comment or suggestion

_____ for how we could improve future training. We value your feedback.

Stephanie is an excellent instructor. She is very knowledgeable with the products and procedures with the company. She is also very patient and takes the time to make sure you know what she is talking about before she moves on. Her great outgoing personality is a major plus. I really don't feel anyone could do the job as well as Stephanie does. She made learning a pleasurable experience...

Name: _____ Department: _____

12/28/____

Annual Performance Review—page 1

NAME: Stephanie

DATE: 10/28-(year redacted)

	5 Fails to Meet	4 Meets at Times	3 Meets	2 Exceeds at Times	1 Far Exceeds	Rating
Teaching Aids				X		2
Classroom Training				X		2
COMET Updates			X			3
Employee Progress Reports				X		2
Trainee Testing			X			3

Total Points 12	Average Score 2.4	Overall Rating Exceeds At Times	Compo Ratio 76.6% o
Current Rate of Pay \$ annually	Percent Increase 5.5% <u>\$-Increase</u>	New Rate of Pay \$/annually 111a111'pay	Effective Date 10/12,a

<p>1) Select and develop teaching aids after determining the training needs for Customer Sales and Service Stef is a very creative person, and her teaching aids display her talents well. She has developed several supporting training aids during the last year for initiatives including training, training, training, Training, and one on one sales training. Her teaching aids are always creative and colorful, however they are also very effective. Our success in these initiatives are directly related to the supporting teaching aids she provides.</p>
<p>2) Conduct training in sessions to establish competency in all specified areas. This is an area where Stephanie excels. She is an excellent trainer who fully engages her classes in the learning process. She has trained several and classes during the past year, even traveling to to assist in starting up the operation there. Her participant evaluations are of consistently high caliber, including comments like "very enjoyable experience" and "Stef is an excellent trainer." To a person, her evaluations were excellent, which indicates her students enjoyed the training experience. The Supervisors report her trainees are prepared when they join the floor so, in addition to being an engaging trainer, Stef's techniques are effective in ensuring her students learn the material.</p>
<p>3) Keep abreast of enhancements/updates; facilitate training of existing staff and new hires on updates as appropriate. There have been minimal updates during the past year due to the SAP implementation, however Stef has kept abreast of departmental changes to processes and procedures in Customer Sales, Customer Service, Come and Come Admin. Stef plays the role of</p>

<p>liaison, evaluating the impact of process changes and communicating across departments as necessary. This cross department communication is crucial to quality initiatives. In-addition, Stef joined our-team, volunteering to take on many of Donna's action items when Donna moved to... This filled a lull in activity for Stef, but also helped the team out tremendously in continuing to pursue Donna's action items.</p>	
<p>4) Report on progress of employees under guidance during training periods. During the past year, Stef has taken a more active role in dealing with student issues. Previously, when these issues occurred, either the Supervisor or I would deal with the student. Stef has good judgement, but seeks guidance as appropriate when issues occur during training as she now deals directly with student issues herself. She also keeps both the supervisor and me advised of issues as they occur. This has been a great growth area for Stef and will help to prepare her for future leadership positions.</p>	
<p>5. Test trainees to measure progress and to evaluate effectiveness of training.</p>	
<p>Employee Signature: _____ Stef implemented weekly testing to determine trainee progress throughout the class. The evaluations are extremely useful in determining areas where students require extra assistance and, also identifying those trainees who may have chosen an incorrect path. Material from these evaluations are shared with the student's supervisor as appropriate to ensure a smooth transition for the trainee.</p>	<p>Date: <u>11-20-11</u></p>
<p>Supervisor's Signature: _____ Managers Comments: _____ Managers Signature: _____</p>	<p>Date: <u>11-10-11</u></p>
<p>Human Resources: _____</p>	<p>Date: <u>11/11/11</u></p>

JOB DES

JOB DESCRIPTION—page 1

POSITION	AGENCY
	DIVISION OR INSTITUTION
	UNIT OR OFFICE

() State Agency (X) County Agency () New Position (X) Change

Usual Working Title of Position: Training Coordinator

Position No. and Title of: [Redacted] Director

Normal Working Hours (Explain unusual or rotating shift): Monday - Friday, 37 1/2 hours

Job Description and Work Characteristics	
%	Job Duties

- 40% Assist in hiring, training, and scheduling of Job Coaches. Over see the day to day operations of job coaching. Provide input for Job Coach performance evaluations. Solicit feedback from employers regarding job coaching services provided. Coordinate weekly schedules for Job Coaches to meet consumer needs. **Review** time cards for Job Coaches and insure appropriate billing for services (ORSC, Beacon School, etc.)
- 20% Complete or oversee the completion of job analyses. Complete job match to identify the most qualified candidates for available jobs. May accompany Job Developer on employer contacts. Develop and teach/coordinate employment and training for consumers. Assisi Plan Coordinators with pre-employment activities (scheduling transportation, meeting employers, etc.)
Coordinate/develop written reports for funding sources, job coaching results, etc.
- 8% Provide job coaching services.
- 5% Insure that best practices are used in providing job coaching services. Including the emphasis on systematic instruction, development of training aids, and collaborating with others to meet individual needs at the job site Uob modifications, etc.)
- 5% Assist with special events that promote [Redacted] Business After Hours, Chamber fapos, etc.)
- 5% Assit in the preparation for [Redacted] Accreditation, etc.
- 5% Assume other duties as assigned by supervisor and/or administrat:;)
- 2% Attend Business Advisor Council meetin"S

- Must meet applicable registration requircmenL, OF
- Must be able lo physically complete lhc m luircd uisk..., including lifting Ufl lo 50 roumls.
- Valid Ohio Driver's Uccnsc and g01xJ driving rccorll.
- Supervisory cxrcrccnc.
- J/hilil)'111re.ad. write. and communicate effectively.
- Must have strong organizational skills.

WORK CONDITIONS - The majority of work hours are spent at 2 The employee may be involved in incidents requiring physical intervention and assistance to assure lhc safely of the enrollees. Intervention is inherent to this job. Intervention will occasionally result in bruises, scrapes. etc. 10 the employee. Working conditions may exist that are not such as nonnally exist in the occupation of a public employee. These conditions may include exposure 10 blood borne pathogens. communicable disease, polen<ially infectious materials, and/or aggressive behavior. As necessary, lhc employee shall compl)' with safely rules established for lhc purpose of fulfilling compliance with Ohio Employmen< Risk Reduction Standards, Rules, or Orders through the utilization of protective equipment and decontamination 1echniques. Probnlionny perio<1 - 120 da s.

BOARD OF MENTAL RETARDATION AND DEVELOPMENTAL DISABILITIES

OH -

(740

NOTICE OF AVAILABLE POSITION

TRAINING COORDINATOR

Qualifications: Must meet applicable registration requirements of [redacted] Must have GED/High School Diploma. Must be able to physically complete the required tasks, including lifting up to 50 pounds. Must have a valid Ohio Driver's License and good driving record. Ability to read, write and communicate effectively one-on-one or in group settings. Must have strong organizational skills. Must have basic computer skills. Prefer knowledge with audio-visual equipment: i.e., video projector, DV.D player, electronic tablet, and educational software.

Duties: Coordinate job-coaching activities. Coordinate weekly schedules for Job Coaches to meet consumer needs. Verify time cards and travel forms for accuracy for Job Coaches and ensure appropriate billing services [redacted]. Complete or oversee the completion of job analyses. Complete job match to identify the most qualified candidates for available jobs. May accompany Job Developer on employer contacts. Coordinate/develop written reports for funding sources job coaching results, etc. Provide job coaching as needed. Ensure that best practices are used in providing job coaching services, including the emphasis on systemic instruction, development of training aids, and collaborating with others to meet individual needs at the job site job modifications, etc.) Develop and conduct staff training need surveys to determine the types of training desired. Research appropriate staff trainings offered and maintain a bulletin board displaying brochures and workshop/seminars available. Coordinate a minimum of four staff in-service trainings per year as per the calendar. Coordinate and maintain staff requests for in-service training. Be responsible for monitoring training budget. Research, coordinate, and schedule 1-2 hour monthly staff web-based trainings for all Job Coaches in the training room. Complete application for training approval for continuing education from [redacted] and submit to Director of [redacted]. Work with the Director of Facilities and Transportation to ensure that Job Coaches maintain requirements for transporting people with disabilities. Provide oversight of the training room by monitoring the schedule of training activities. Maintain an ongoing monthly log tracking client and training use. Develop, catalog, and maintain training materials and resources. Submit Purchase Orders for training materials, equipment, and supplies. Monitor and maintain the care and condition of the training room equipment, i.e., video projector, computers, electronic tablet, supplies, etc., and report problems to the Secretary on a Computer Service Request form. Attend regularly scheduled Training Room/Technology meetings. Determine consumer employment training needs and satisfaction by developing and implementing surveys, program evaluation results; and input from Job Coaches, Habilitation Specialists, and other team members. Coordinate and/or teach Job Seeking Skills training to consumer each coordinator; minimum four times per year. Submit and collect Job Seeking Skills referral forms to Habilitation Specialists, Job Developer, employers, and ORSC counselors. Coordinate and teach Job Skills training with Habilitation Specialist to consumers on a regular basis during down times; morning, afternoon or etc. Provide or coordinate regularly schedule job club/job retention activities for workers with disabilities placed in community jobs. Gather information and data on program outcomes for consumer-related training and to develop recommendations for services. Stay up to date with assistive technology, adaptive, rehabilitative devices, training aids and the process used in selecting, locating, and using them. Attend assistive technology training and serve as the [redacted] staff resource. Coordinate and manage [redacted] authorizations, reports and track funding levels. Attend local, regional, and state-meetings and assist with other duties relating to the coordination and quality assurance of [redacted]

- services. Provide or assist Job Coaches with implementing training and/or education materials for employers and businesses, i.e. seizure disorders, etc. Assist with special events that promote (Business After Hours, Chamber expos, recognition, holiday events, fundraisers, and other public relations efforts, etc.) Assist in the preparation for - - - - [redacted] Accreditation, etc. Assume other duties as assigned by supervisor and/or administration. Attend Business Advisory Council meetings, Department Meetings, etc., and present reports to groups.

- Wage: Per adopted salary schedule
- Status: - Union
- Benefits: Health, Vision, Dental, and Life Insurances and Sick, Vacation, and Personal Leaves
- Schedule: Monday- Friday, 37 *Yi* hours, flexible
- Deadline: March 1
- Date Posted: February

Applications should be obtained from and submitted to the Administrative Office [redacted] OH

Applications or resumes must be received by 4:00 PM on Marc 1



CERTIFICATE OF ATTENDANCE

STEPHANIE HOWELL

HAS PARTICIPATED IN THE
JOB TRAINER ASSOCIATION

Specialized Training Days
Where Rehab Meets the Road
Who Are You As a Job Coach:
Defining Your Style and Skills

and

expanding Your Skills as a Job Coach

May 14

6 credit hours
MRDDCert

JOB TRAINER ASSOCIATION, A DIVISION OF ORA





CERTIFICATE OF ATTENDANCE

STEPHANIE [REDACTED]

HAS PARTICIPATED IN THE
Specialized Training Day
Where Rehab Meets the Road

Provided By &
Divisions of the
Ohio Rehabilitation Association

JAN - Job Accomodation Network
Best Practices for Developers and
Coaches

The Two Faces of Community
Employment:

August 13, 2011

[REDACTED], [REDACTED], OH

6 credit hours

MRDD Cert# [REDACTED]

Certification Chair





CERTIFICATE OF ATTENDANCE

Stephanie 

HAS PARTICIPATED IN

Job Coach Boot Camp

**Sponsored by the Job Trainer
Association**

&

**The Rehabilitation Training &
Resource Center**

Nov. 30, Dec. 1 & **2-9**

20 credit hours

MRDD.. --

JOB TRAINER ASSOCIATION, A DIVISION OF ORA



[Redacted]
Adult Career Center

*Certificate
of
Completion*

this certifies that

Stephanie [Redacted]

*has satisfactorily completed 3 hours of
Performance Feedback Training
on this 26th day of May [Redacted]*

Instructor

Director

Superintendent



Every Person. Every Talent. Every Opportunity.

Coaches Webinar

It is hereby verified that on July 2 -

Stephanie

Successfully completed Worksite Analysis for Job Coaches webinar and is hereby credited to 1 hour of Continuing Professional Development Units in the category of:

- 1] Adult Services/Day Habilitation
- D Investigative Agent
- D Service & Support Administration
- D Superintendent/Assistant Superintendent
- D County Board Members

DODD Training Approval [Redacted]

Ohio¹⁰ Department of
Developmental Disabilities



[Redacted] Deputy Director

**Department of Mental
Retardation and
Developmental
Disabilities**

Participant Identification

-Approval

Verification of Seminar Completion

This is to certify that **Stephanie** has
completed thirty clock- hours of training in Introduction to

Lesha _____ Instructor



Developmental Disabilities, sponsored by Quality Enhancement

Services & Training (OEST) and conducted via Independent
Study Correspondence Course from February 16 to March 2--

In witness thereof,

[Redacted Signature]

[Redacted Signature] / 11 ?
Approval No.

[Redacted Signature]

- Department of Developmental Disabilities

Participant Identification

[Redacted Participant ID]

Leshia Self-Stoehr Instructor

Verification of Seminar Completion

Certificate of Completion
for Seminar Quality
Enhancement Services
and Training January 8
to March 26

Ill Department of Developmental Disabilities

Participant Identification

Approval No.

Verification of Seminar Completion

This is to certify that **Stephanie** has completed thirty clock-hours of training in Principles of Work sponsored by Quality Enhancement Services & Training (OEST) and conducted via Independent Study Correspondence Course from January 8 to March 26

In witness thereof,

Lesha Instructor

Date Presented

Certificate of Completion

This training provides 12 hours of on-line pre-service or continuing education training in the following topic:

Orientation to Supported Employment

This is to document that at

Stephanie

OH

has successfully completed all of the requirements of the web-based training curriculum : December 9

Presented by :

Lead Trainer



Training Resource Network PO Box [redacted] www.trninc.com info@trninc.com

Training Department Orientation Confirmation of Training—page 1

1. Completed Ohio Association of County Boards testing and provided a copy of my certificate to the Training Coordinator.
2. Submitted a copy of my high school diploma or equivalent.
3. Completed new hire paperwork at- . (Payroll, etc.)
4. Completed new hire processing at . (Fingerprints, etc.)
5. Confirmed access to email
6. Confirmed access to Gatekeeper
7. Received a tour of the facility.
8. Received information/instructions regarding the following emergency procedures:
 - a. Location of fire extinguishers
 - b. Fire drill procedures
 - c. Emergency exits
 - d. Tornado drill procedures
 - e. Lock Down procedures
9. Hazardous Chemicals Training
10. HIPPA Training
11. Universal Precautions Training
12. MUI/UI Training
13. Signed and returned the following forms to the secretary:
 - a. HIPPA Agreement
 - b. Computer Usage Handbook & Agreement
 - c. Workplace Go ,sip Training & Agreement
 - d. Driver's Abstract Consent Form
 - e. Emergency Contact Information
14. Mission & Vision Statements.
15. Reviewed/received Rights of Individuals with Disabilities
16. Job descriptions/flow chart/explanation of roles
17. Vehicle Driver Training (provided by transportation department)
18. Explanation of services
 - a. Internships
 - b. Work Adjustments
 - c. Job Tryouts
 - d. Personal Adjustments
 - e. Career Explorations
 - f. Job Development
 - g. Follow Along
19. Explanation of training department forms used:
 - a. Job Trainer Time Sheet
 - b. Job Trainer Breakdown
 - c. Client Time Sheet

Training Department Orientation Confirmation of Training—page 2

- d. Schedule
 - e. Pre-Training Checklist
 - f. Substitute Trainer Form
 - g. Purchased Services Account (PSA)
 - h. Mileage/Expense Reimbursement Form
 - i. Time Off Request Form
 - j. Task Analysis
 - k. Vehicle Usage Form
 - l. ORSC Reporting Templates (PRT-1, 2, 3, 5)
 - m. Emergency Medical Authorization (EMAF)
 - n. Individual Service Plan (ISP)
 - o. Behavior Support Plan (BSP)
20. Introduction to Gatekeeper
- a. Screens and functions overview
 - b. How to enter a case note
 - c. How to review case notes
 - d. How to print an EMAF
 - e. Explanation of Billing/Service Codes
21. Timelines
- a. All time sheets are due on Friday by the end of the business day.
 - i. Anyone scheduled to work on Saturday may turn in his/her time sheet on Monday, no later than 9am.
 - b. All reports are to be written the same day the service is provided.

Please sign and date in the appropriate section :

I have received training in each of these areas. I understand that going forward, some policies, procedures, and/or practices may change and additional training will be provided as needed. I agree to contact the Training Coordinator in a timely manner for any training needs I may identify in the future.

Signed: _____ Date: _____

I need training/additional training in one or more of the categories listed above. Those categories are:

Signed:----- **Date:**_____

Photograph of APSE Award Statue Received



AWARD NOMINATION FOR APSE AWARD

APSE ward
Nomination Professional Award
For Ms. Stephanie

Professional Award

Description: To confer recognition on an individual for outstanding best practices and professional achievements as a job coach, job developer, employment specialist, or agency personnel. Please consider the follow criteria when writing your narrative as to why this individual is deserving of this recognition.

Criteria

What makes this individual exceptional in their area?

Stephanie is dedicated to providing the best training to workers with disabilities, Stephanie strives to give her best in everything she does and in doing so she encourages people with disabilities to do the same. Stephanie is a role model to people with disabilities. She treats everyone with respect, dignity while bringing out the best in others. Stephanie demonstrates tact and diplomacy when dealing with difficult situations and is excellent with conflict resolution.

Stephanie is charged with providing job skills and job etiquette training to workers with disabilities. Stephanie was previously employed by a large private sector corporation and was responsible for providing training for the company's staff. Stephanie has brought the same high standard employment; training methods and adapted them to job skills and job retention training for people with disabilities.

While Stephanie provided basic Job Skills instruction for people with disabilities, she had the mission of providing additional training for individuals who were already employed in community employment by focusing on job retention. Since attendance at this particular training would be primarily on a volunteer basis, Stephanie knew she had to come up with a new and exciting activity to attract folks to come to training after work. With this challenge came the inception of the Show, a

series, featuring film, food, trivia, prizes, mixing in job skills training. This concept was not only successful but became an instant success bringing in many individuals who had been employed in the community for years, but were in need of a refreshment. It is a good example.

What have their achievements been and why are they significant?

[redacted] is a member of the Board of Developmental Disabilities. The program has been quite successful in placing individuals in community employment, but continuously struggles with job retention. Several training approaches have been implemented over the years; however, it has been challenging to attract individuals already employed in the community to come to any formalized job retention program. Stephanie's design and implementation of a six-week job retention program presented as a game show, has allowed employees to help employees stay employed while having fun in an informal environment. While it is difficult to measure just how many people have retained their jobs as a direct result of this format, we are convinced that Stephanie's creative approach to being a good employee has definitely played a part in assisting individuals with disabilities in keeping their jobs.

What do the person's served/employers say about this individuals/organizations accomplishment? *It was a fun and engaging way to teach and reinforce critical work behavior"*

"It was good", "pictures made me laugh", "learned about being on time", "liked the prizes" "It was good", "liked when she (Stephanie) asked questions", "(enjoyed) the game".

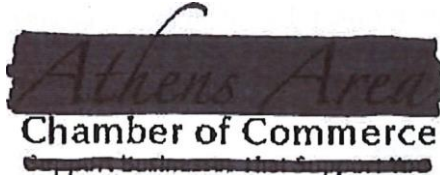
Participant

Thought he (Steph(!llie) did real g<}r;Hl " "leached you about hbs and working good in the <;ommrity. "

P cipant

"The employer response. 10 the program has been very positive. Several employers who serve as advisory cozmci/members to have peen impressed with Stephcmie 's creative approqch iO teaching job slq/{s".

Nomination of Stephanie for Professional of the Year Award Letter from Chamber of Commerce



1 [redacted] OH [redacted]
www [redacted] .com [redacted]

February 21

Dear members of the selection committee,

I am so excited and honored to nominate Stephanie [redacted] or the [redacted] APSE Professional of the Year Award.

„-..._

I have been involve<J with HR, Job Development, and management in some capacity over the last fifteen years be&imigj at a family owned business, [redacted] local employment agency, [redacted] an [redacted] and currently as President of the [redacted] Chamber of Commerce. Rarely had I seen such positive results and work performance turnarounds until I was fortunate enough to become a part of the [redacted] team and since leaving- a member of their Business Advisory Council, Through the efforts and creativity of Training Coordinator, Stephanie [redacted] retention rates have self-corrected: from a previous annual rate of 73% (still above industry norms) to close to 100%.

Stephanie incorporates role-play, videos, discussion forums, guest speakers, and visual aid sheets and games to address such important issues as hygiene, chronic absenteeism. sexual harassment, and work quality in general into her [redacted] curriculum. At the end of each six-week class, Stephanie treats perfect attendance participants to a celebratory party and awards them with certifica of completion. Most important of all, Stephanie conducts a private ex.it interview with each individual to determine accountability for issues or areas, which brought them to [redacted] in the first place. She also asks participants for their input so that she can better adapt her lesson content for future sessions.

This unique training has proven to be an excellent "job save" tool, a positive work ethic reinforcement for folks, and an effective selling point to our - - - - business and service industry community. Because of the end results of her - - - - more outside interests have taken notice of the achievements and the inroads to successful community placement partnerships.

At the £ [redacted] Chamber of Commerce we employ a young man from [redacted] to collate our monthly newsletter. From time-to-time we request a Job Trainert to "tweak" a lapse in


(

behavior or to introduce him to a new job task. Stephanie is quick to respond to our needs and requests and she does an exceptional job of matching the most appropriate Job Trainer to this young man's skill level, personality, and our office environment.

Stephanie is so very deserving of the APSE *Professional of the Year* Award. It is my hope that you will see fit to honor this very compassionate, creative, successful leader for this honor.

Respectfully submitted,

A dark, rectangular redaction box covering a handwritten signature.

 President
 Chamber of Commerce

I Letter of Recommendation for APSE Professional of the Year Award

- Ohio -
February 23..

I Dear Award Selection Committee:

I am writing this letter of recommendation in support of Stephanie- nomination
for the :APSE Professional of the Year Award.

As the Training Coordinator for Ms. J is an exceptional
communicator and gifted trainer. She is the perfect model of a dedicated professional
who knows how to motivate both her staff and her students. Ms. as designed an
extraordinary opportunity for the individuals she serves in both her land..
programs, as well as the numerous other training opportunities she offers, for learning job
readiness and job retention skills. She is a dynamic and powerful facilitator who
possesses the gift of being able to make complex subjects understandable.

Ms. has demonstrated time after time her commitment to enriching the lives of
those around her, both professionally and personally. The amount time and effort she
puts into every task far exceeds the expectations of her position. Over the course of her
employment with Ms. has truly exemplified excellence,
improving every aspect of her duties. Further, she has the unique gift of being
compassionate yet firm with the individuals she interacts with in her multi-faceted
position. She earns the admiration and respect of those individuals by encouraging,
expecting, and leading by example, and her energy and enthusiasm are contagious.

On a personal level, Ms. is raising her three children to respect and embrace .
people of all abilities and to know that working should be a "rite of passage" for
everyone. She is inventive, honest, and diligent in all aspects of her life.

I appreciate the opportunity to advocate for Stephanie for the honor and
distinction of this award. Thank you in advance for your consideration.

Respectfully submitted,

[Redacted Signature]

[Redacted Title] Coordinator of [Redacted]

Letter Nominating Stephanie for APSE Professional of the Year Award

February 20...

NEW LOCATION

Dear APSE [REDACTED] Awards Selection Committee:

Ph:

It gives me great pleasure to nominate Ms. Stephanie [REDACTED] for the APSE [REDACTED] Award for Professional of the Year award.

Fx: [REDACTED]

I have witnessed people come and go in the field of community employment, but I have never met anyone with the enthusiasm, drive and determination to provide the best job training and retention programs to workers with disabilities, as Stephanie

Stephanie has a dynamic personality and the determination to be the very best at whatever she does. Stephanie goes above and beyond to strive for perfection and is truly a professional in everything she does.

Stephanie has truly fostered creativity resulting in new options for [REDACTED] by implementing new and innovative job training and job retention programs. [REDACTED] had a need to enhance its job retention training for workers with disabilities. However, it was difficult to attract workers to attend training after they had worked all day. Stephanie took this challenge and came up with a highly effective six-week program that combined fun, food, pop culture trivia laced with job skills and job retention questions in the form of a game show. This highly unique approach was the perfect combination to reach workers to improve their job skills on a voluntary basis.

With the generosity of a grant from Wal-Mart, Stephanie was able to purchase game show software with formats similar to Jeopardy, Wheel of Fortune as well as develop her own. These computerized formats allowed Stephanie to introduce hundreds of questions showcasing how to be a good worker along with fun trivia. The game show was set up with an audience made up of workers with disabilities with game show guests rotating, giving everyone a chance to participate. The program lasted one-hour per week for a total of six-weeks with wonderful results.

Stephanie's nontraditional approach to job training is empowering workers with disabilities by helping them become more aware of their employment obligations.

Stephanie's success is not limited to her implementation of the [REDACTED] program. Stephanie also provides one-on-one training with workers with disabilities who need help focusing on a particular problem area. Stephanie has earned the trust of those she assists and has put them at ease as they improve their job skills.

Stephanie is well respected by her peers and co-workers and is a member of the [REDACTED] Chamber of Commerce [REDACTED] Club and the [REDACTED] for the [REDACTED] High School Varsity Squad. Stephanie and her cheerleaders will be participating in the annual [REDACTED] Festival, held at the [REDACTED] center. The squad will be developing a special cheer in conjunction with promoting our [REDACTED] Summer - [REDACTED] Training and Employment program. This event draws nearly 300 community members, families and local organizations.

I have never supervised anyone so deserving of this award as Stephanie [REDACTED] You will not find anyone who will be so honored and grateful to be selected for the [REDACTED] Professional of the Year as Ms. Stephanie [REDACTED] In addition, knowing Stephanie, instead of drawing attention to herself, she will educate folks about APSE and its mission. Stephanie will continue to support workers with disabilities realize integrated employment and career advancement opportunities for individuals with disabilities

Sincerely,

[REDACTED]
Director, [REDACTED]

Providing qualified and dedicated employees - Since '911
An equal opportunity employer/provider of services

Letter of Support for Stephanie as APSE Professional of the Year Award

February 22, year redacted

Awards Selection Committee

NEW LOCATION

De [redacted] Awards Selection Committee,

Ph

Fx [redacted]

It *is* indeed a pleasure to write a letter of support for Stephanie [redacted] or the Professional Award. I have only known Stephanie for the past several months but I have seen first hand what a valued professional she is as the Training Coordinator for [redacted]

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r

Stephanie brings to the [redacted] organization a fresh perspective. She has revitalized the position of [redacted] Coordinator with innovative ideas and a creative touch. She has reviewed and improved many of the forms and reports that detail the progress of the individuals we served. An example of this is the Job Sampling Summary report that is sent to third party funding sources for example the Bureau of Vocational Rehabilitation. She made the report more concise and informative. She created a code that allows the reader of the report notice at a glance whether there were no concerns, potential for concerns or a significant level of concern in the areas being reported on.

Stephanie has a natural instinct for teaching. Part of her responsibilities includes [redacted] is a service that is provided to individuals who have either lost their job or are in jeopardy of losing their job. [redacted] teaches individuals the skills necessary to maintaining employment.

Stephanie has also created a new program called [redacted]. This program utilizes a computer based learning program that incorporates well-known TV quiz shows. Through a combination of questions that were both work related and pop culture, Stephanie developed a true spirit of fun and learning that was extremely well received by the individuals [redacted] serves.

Stephanie brings to the individuals we serve as well as her co-workers a professional and fun loving demeanor that often breaks through tough discussions. She is respectful to those we serve. She is a team player. She takes on challenges and juggles a wide variety of responsibilities. She is a master at making creative PowerPoint presentations that enhance the knowledge for any type of group she is presenting to.

It has been my good fortune to have Stephanie on board as a teammate in the challenging business of supported employment. She is flexible and dedicated. She will do whatever it takes to get the job done. She is well liked by the individuals we serve. I truly believe that Stephanie is a great choice for the [redacted] professional of the year.

Sincerely,

[redacted signature]

[redacted] Specialist

Letter of Support for Stephanie as an Instructor

February 23,

This letter was dictated by [redacted] J Board of Developmental Disabilities enrollee. [redacted] attended the [redacted] Program created by Stephanie

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I like the [redacted] Program.

My favorite part of the [redacted] Program was seeing the different faces that I know on the commercials.

,Stephanie is-a good person. .She leteveryone piok a prize. .Stephanie--did -a good 3ob.

I liked the [redacted] Program because Stephanie works hard with us and teaches us different things.

She ordered pizzas and stuff for the game for us.

She would give us clues.

At [redacted] I leam. .clbe on tim_eJQ[your job and majse sure you clock out on time.

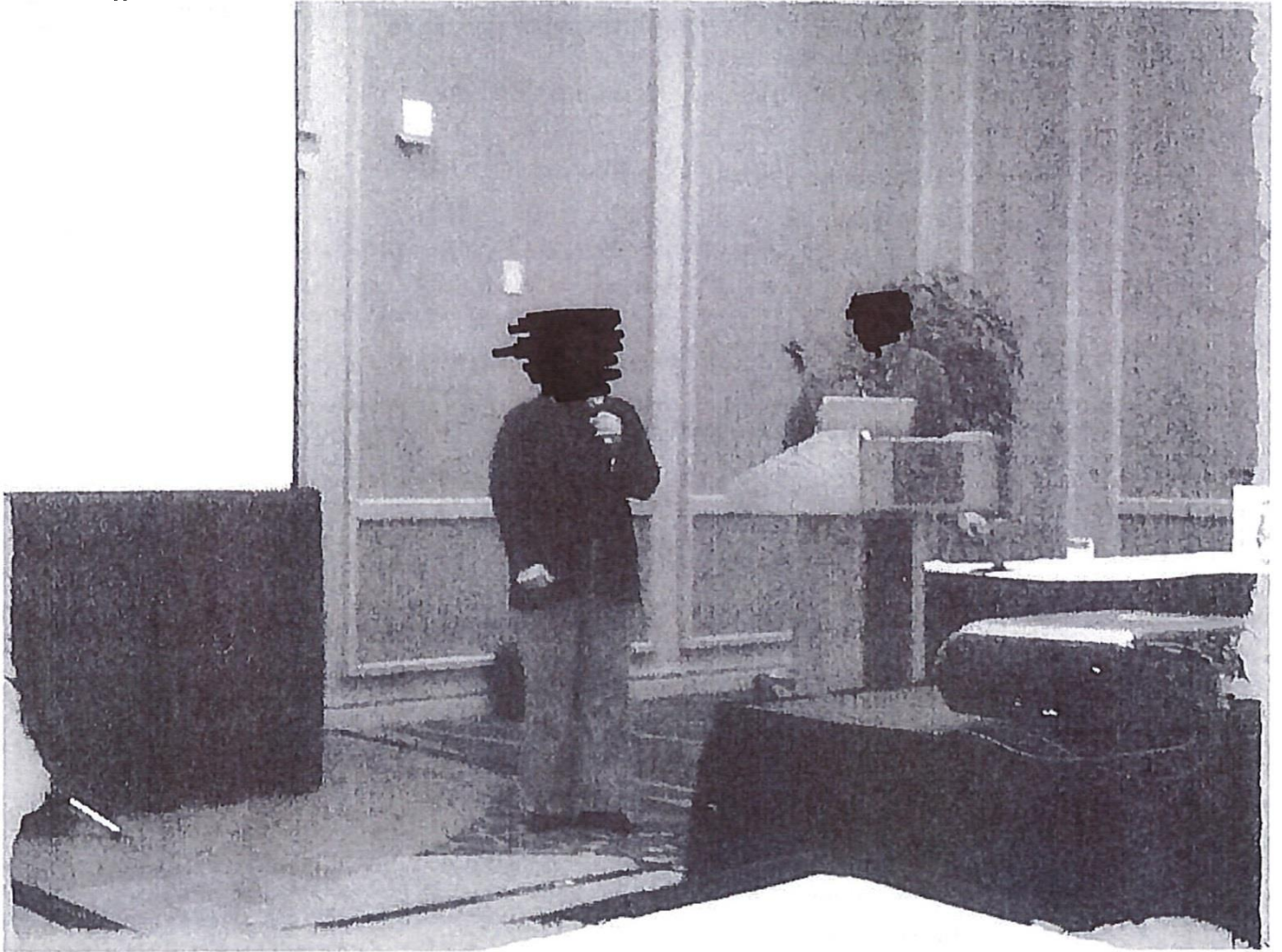
I would tell people to go to [redacted] because they might learn more, th.e new people might learn more too.

[redacted]

Photo of Stephanie presenting/instructing—face redacted

Stephanie-

co-presenting'



Blank Business Customer Satisfaction Survey

██████████ appreciates your partnership and your dedication to providing community employment opportunities for individuals with disabilities. Please let us know how we are doing so we can continually strive to provide the highest quality services.

PLEASE COMPLETE AND RETURN IN THE SELF-ADDRESSED, STAMPED ENVELOPE

Business Name: _____ Today's Date: _____

Please rate your experience with the Coordinator:

(1-poor, 2-below average, 3-average, 4-above average, 5-excellent)

- 2 3 4 5 Friendliness
- 2 3 4 5 Professionalism
- 2 3 4 5 Communication
- 2 3 4 5 Organization

Comments: _____

Trainer:

(1-poor, 2-below average, 3-average, 4-above average, 5-excellent)

- 2 3 4 5 Friendliness
- 2 3 4 5 Professionalism
- 2 3 4 5 Communication
- 2 3 4 5 Interactions with staff
- 2 3 4 5 Interactions with client

Comments: _____

Intern:

(1-poor, 2-below average, 3-average, 4-above average, 5-excellent)

- 2 3 4 5 Friendliness
- 2 3 4 5 Professionalism
- 2 3 4 5 Communication
- 2 3 4 5 Interactions with staff

Opportunities for growth: _____

Comments for the Intern: _____

Will you use _____ again? _____

Will you recommend _____ to others? _____

BLANK Customer Satisfaction Survey

█ greatly appreciates you and strives to provide each client with the best possible experience. We value your feedback.
Please tell us about your experience and return this completed form in the self-addressed, stamped envelope. Thank you!

Name: -----
Service: -----
Date: -----

Scoring: 1-strongly disagree; 2-Disagree; 3-Neutral; 4-Agree; 5-Strongly agree

Coordinator:

- My intake meeting was scheduled promptly 1-2-3-4-5
The coordinator was friendly, personable and professional 1-2-3-4-5
The coordinator explained things so that [understood them 1-2-3-4-5
The coordinator prepared me for what to expect from my work experience 1-2-3-4-5
The coordinator provided me with a schedule prior to my first workday 1-2-3-4-5

Trainer:

- The trainer was on time for each day of my work experience 1-2-3-4-5
The trainer was friendly and personal 1-2-3-4-5
The trainer was professional 1-2-3-4-5
The trainer seemed prepared and ready for the assignment each day 1-2-3-4-5
The trainer was focused on my work experience and my success 1-2-3-4-5
The trainer demonstrated a good work ethic 1-2-3-4-5
The trainer helped make me comfortable in the work setting 1-2-3-4-5
The trainer assisted me with learning the job 1-2-3-4-5
The trainer promptly helped when I forgot something or struggled with a task 1-2-3-4-5
The trainer gave me reminders of my schedule, the last workday, etc. 1-2-3-4-5

Comments: -----

Will you use █ again? -----

Will you recommend █ to others? -----

Stephanie
Coordinator
Phone : FAX:

BLANK Employer Satisfaction Exit Interview

Employer: _____

Date: _____

Address: _____

Preferred Method of Contact:

- Phone
- e-mail
- Fax
- Personal Visit

Employee: _____

Job Trainer: _____

Job Developer Satisfaction

How did you feel about the Job Development Process?

- Very satisfied
- Somewhat satisfied
- Not satisfied
- N/A**

How would you rate the Job Developer's follow-up and customer service abilities?

- Very satisfied
- Somewhat satisfied
- Not satisfied
- N/A**

Comments: _____

Job Trainer Satisfaction

How satisfied are you with the Job Trainer's performance?

- Very satisfied
- Somewhat satisfied
- Not satisfied
- N/A**

Was the Job Trainer a good match for your business?

- Very good
- Good
- Poor
- Not at all

Comments: _____

Job Placement Process

How would you rate the Job Placement Process?

- Very satisfied
- Somewhat satisfied
- Not satisfied
- N/A**

Were you provided details of training?

- Yes
- No

Were you notified of the trainer's last day?

- Yes
- No

Would you hire from _____ again?

- Yes
- No

Would you recommend _____

- Yes
- No

Comments: _____

BLANK New Hire Satisfaction Survey

Name: _____

Date: _____

Address: _____

Job: _____

Employer: _____

Job Trainer: _____

- Specialist:
- Beth
 - Craig
 - Jack
 - Jamie

Job Development Satisfaction

How did you feel about the Job Development Process?

- Very satisfied
- Somewhat satisfied
- Not satisfied

Are you satisfied with the type of job in which you were referred?

- Very satisfied
- Somewhat satisfied
- Not satisfied

Comments: _____

Job Trainer Satisfaction

How satisfied are you with the Job Trainer's performance?

- Very satisfied
- Somewhat satisfied
- Not satisfied

Was the Job Trainer a good match for you?

- Very good
- Good
- Poor
- Not at all

Comments: _____

Job Satisfaction

Is this job a good match for you?

- Very good match
- Satisfactory match
- Unsatisfactory match

Were you provided details of training?

- Yes
- No

Were you notified of the trainer's last day?

- Yes
- No



Would you work with [redacted] again?

- Yes
- No

Would you recommend [redacted]

- Yes
- No

Comments: _____

Club Satisfaction Survey

Name: _____ Date: _____

Address: _____

Phone: _____

Employer: _____ Job: _____

Facilitator: _____

Habilitation Specialist:
D Beth
D Craig
D Jack
D Jamie

Job Club Satisfaction (General)

How did you feel about the Job Club Class?

- D Very satisfied
- D Somewhat satisfied
- D Not satisfied

Are you satisfied with the type of training you received?

- D Very satisfied
- D Somewhat satisfied
- D Not satisfied

Comments: _____

Trainer Satisfaction

How satisfied are you with Trainer's performance?

- 0 Very satisfied
- 0 Somewhat satisfied
- D Not satisfied

Was the Trainer a good match for the nurse?

- D Very good
- D Good
- D Poor
- D Not at all

Comments: _____

Information Provided

Was the information in the course appropriate?

- D Very appropriate
- D Satisfactory
- D Inappropriate

Were you provided details of training?

- D Yes
- D No

Was the information useful to employment?

- D Yes

I

- D No

Would you work with _____ again?

- D Yes
- D No

Would you recommend _____

- D Yes
- D No

Comments: _ _ _ _ _

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