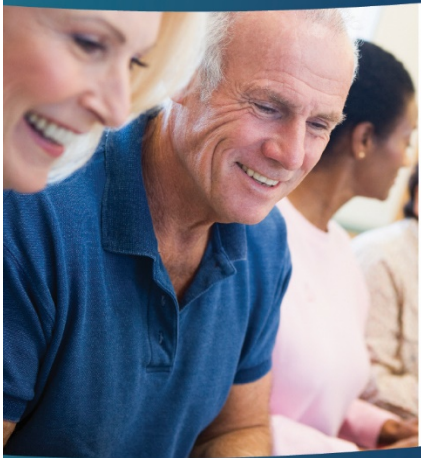


# IAOET


Standards for Lifelong Learning



Strategic Planning and  
CE/T Innovation Workshop

# Participant Workbook

INTERNATIONAL ASSOCIATION FOR CONTINUING EDUCATION AND TRAINING



Thank you for the opportunity to serve your organization. IACET has put together the following objectives for the workshop. This workshop will be customized based on the needs specified by your organization. The session will be a combination of strategic planning, global training trends, and an instructional design and delivery workshop.

## Objectives for the Workshop

1. **Discuss** business/operating models for the organization for managing change and serving the customer/learner.
2. **Develop a strategic plan** for the training organization regarding its continuing education and training initiatives.
3. **Overcome or adapt** to threats as change continues pervade the industry and organization.
4. **Position** the organization to envision a spectrum of practical possibilities and tools regarding how it designs and delivers relevant training. Specific issues that will be explored include:
  - a. Flipped classroom offerings leveraging technology.
  - b. Micro-learning and associated strategies for content repurposing.
  - c. New distance learning offerings and technology drivers to leverage efficiency.
  - d. Micro-credentialing and creating pathways for innovating learning and promotion of Atrium programs.
  - e. Augmented reality learning aids.
  - f. Synchronous learning options.
  - g. Learning management systems and features needed to meet goals.

NOTE: IACET has no proprietary interest in any product or service mentioned as part of our session.

# AGENDA

## Pre-event questionnaire

The pre-event questionnaire involved attendees completing a short questionnaire about their views of Atrium Health and the current position of the applicable training organization. This survey must be completed several days before the event begins so the facilitator can process the results and structure the following activities. Questionnaire analysis will be used by IACET to structure the sessions and discussions. Attendees will need to complete and submit the questionnaire by a mutually agreed upon deadline.

Note on the agenda below. This workshop is designed for a day and a half but may be facilitated in shorter or longer amount of time based upon the client's needs and resources.

## DAY ONE (first/last half of the day) 12 p.m. to 4 p.m.

1. Welcome and stage setting meeting. (Recommended 3-4 hours)  
The welcome meeting will involve listening to the position of the department from the views of the attendees and summarizing the survey findings. This meeting will involve group discussions, collaborative discovery activities, and consensus building toward the session objectives. Components of this session include.
  - a. Discuss the department's:
    - i. Strengths
    - ii. Weaknesses
    - iii. Opportunities
    - iv. Threats.
2. Clearly define the organization's business, performance and learning needs. This will serve to provide a framework and context to consider the solutions introduced the next day.
3. Begin draft of strategic plan.

## DAY TWO (FULL DAY) 8:30 to 4 p.m.

1. Review SWOT analysis, performance and learning. *Problems to be solved and/or tensions to manage.*
2. Review a spectrum of practical possibilities including tools regarding how the department designs and delivers relevant training in the industry. Specific issues and tools that will be explored include:
  - a. Flipped classroom models leveraging technology.
  - b. Micro-learning and associated strategies for content repurposing.
  - c. New distance learning offerings and technology drivers to leverage efficiency.
  - d. Micro-credentialing and creating pathways for innovating learning and promotion of Atrium programs.
  - e. Augmented reality learning aids.
  - f. Synchronous learning options.
  - g. Learning managing systems and features needed to meet the Atrium goals.
3. Overcome or adapt to threats as change continues to pervade the industry and organization.
4. Finalize draft strategic plan.

# DAY ONE

Notes: The plan design here should start with focusing on the scope of the plan. For example, some organizations have many different subsidiaries and if this work is pertinent to one subsidiary, that should be defined here. The scope of this plan involves what organizational entity: \_\_\_\_\_.

## INTRODUCTION

**Directions:** Clearly define the organization’s business, performance and learning needs. This will serve to provide a framework and context to consider the solutions introduced the next day.

### 1. Workshop accomplishment checklist.

- Agree on goals for the workshop
- Identify “what is in it for me.”
- Review/establish business goals.
- Review/establish performance goals.
- Review/establish learning goals.
- Review/establish learner goals.
- Review and finalize SWOT analysis
  - Strengths
  - Weaknesses
  - Opportunities
  - Threats.
- Review and analyze new potential interventions that can be used to achieve the applicable goals.
- OTHER \_\_\_\_\_
- OTHER \_\_\_\_\_
- OTHER \_\_\_\_\_



Figure 1 – Instructional design priorities for training interventions.

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### 2. Who are we and what are we doing here?

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**3. What is in this session for me? What do I personally want this session to achieve?**

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**4. Review the preliminary survey results and finalize takeaways.**

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### **ESTABLISHING BUSINESS GOALS**

The Department's goals must align closely with the organizational business plan. The Department can provide excellent learning experiences and still be degraded or eliminated by the parent company due to lack of contribution to the overall business plan of the organization.

**1. What is the organization's mission statement?**

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**2. Do you know your department's specific review and/or project goals and associated KPIs? Provide an example.**

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**3. How is success defined within the department as related to the larger organization? (Does the department have a strategic plan or other business guidance directives?)**

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**4. List the top five business goals of the organization? (This is typically revenue, satisfaction level, or other measurable goal that drives business.)** (Group Exercise)

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_
- e. \_\_\_\_\_

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**5. Rank the top five business drivers for your organization?** (Group Exercise)

*These are the things that bring customers to you.*

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_
- e. \_\_\_\_\_

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**Organization's SWOT Analysis. (Group Exercise)**

For time savings the SWOT analysis was pre-populated from survey results.

<b>STRENGTHS</b>	<b>WEAKNESSES</b>
<b>OPPORTUNITIES</b>	<b>THREATS</b>

## PERFORMANCE GOALS – FOR LEARNERS

1. From experience and observation, is the organization meeting its goals regarding how learners perform back on the job? Does the learning they receive make a substantive difference in job performance?

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2. What quantitative and qualitative KPIs are collected to base learner performance on?

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3. Why is training the appropriate intervention for what the organization provides? Why wouldn't a job aid, motivational initiatives or better hiring practices not solve the problems your training seeks to solve?

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4. What considerations does the organization (or instructors) make for learners with different experience levels? *i.e. Doctors verses lower level staff such as nursing assistants.* Is this an issue in instructional delivery? Does the department pretest learners to establish performance gaps or administer any other type of gap identifying assessment?

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5. **What are known macro performance gaps for the organization’s learners?** (*Macro performance gaps are deficiencies prevalent in a large population of learners...this is not the gap of an individual, but of larger groups of learners.*)

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**ESTABLISHING LEARNING AND LEARNER GOALS**

1. **What are the top five challenges the organization experiences with its learners?** i.e. Learners rarely have prerequisite knowledge. These problems could be administrative issues only if they affect learning. (Group Activity)

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_
- e. \_\_\_\_\_

2. **Are instructional plans and teaching methods standardized?**

Note: It should be acknowledged that every instructor will teach a little differently. However, how is uniformity across multiple instructors maintained?

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**3. What resources do instructors have, except their internal knowledge, to teach the interventions they do? i.e. Do instructors have teacher manuals, or other resources to optimize delivery.**

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**4. How are underperforming individuals identified and remediated?**

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**5. Does the department have interventions specific to the skill level of the learner?**

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**6. How are learners rewarded for successfully completing one of the Department's interventions?**

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**7. What is done to reinforce learning AFTER the intervention is complete?**

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**8. List the top five largest expenses the organization incurs that are directly related to the training and other than human resources. i.e. instructional technology, publications etc. (Group exercise.)**

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_
- e. \_\_\_\_\_

## STRATEGIC PLAN TEMPLATE

Mission Statement:

Values:

Strategic Objective 1:

- Tactic 1
- Tactic 2
- Tactic 3

Strategic Objective 2:

- Tactic 1
- Tactic 2
- Tactic 3

Strategic Objective 3:

- Tactic 1
- Tactic 2
- Tactic 3

Strategic Objective 4:

- Tactic 1
- Tactic 2
- Tactic 3



# DAY TWO

## 1. Flipped classroom and blended learning models

What is a “flipped classroom”?

What would be the advantages of this?

What are the disadvantages?

Practical considerations and/or applications for the department:

## 2. Micro-learning and associated strategies for content repurposing

What is a “micro-learning”?

What would be the advantages of this?

What are the disadvantages?

Practical considerations and/or applications for the department:



### **3. Micro-credentialing, badging and creating pathways for innovating learning and promotion**

What is micro-credentialing?

What is badging?

What would be the advantages of this?

What are the disadvantages?

Practical considerations and/or applications for the department:

#### **4. Augmented reality learning aids**

What is a augmented reality?

What would be the advantages of this?

What are the disadvantages?

Practical considerations and/or applications for the department:



## 5. Synchronous learning options

What is a “synchronous learning”?

What would be the advantages of this?

What are the disadvantages?

Practical considerations and/or applications for the department:



## 6. Learning management systems

What is a learning management system? Which types are most appropriate for the department?

What would be the advantages of this?

What are the disadvantages?

Practical considerations and/or applications for the department: