

## **APPENDIX B TRAINING REQUIREMENTS**

### **INSTRUCTIONS**

JCC requests the Contractor to agree to the training requirements as stated. **On this form, proposers must respond directly in this document to sections 1 – 4 pertaining to the following cases:**

- Specific feedback on how you intend to meet the requirements.
- A sufficient response requires a narrative format that includes descriptions of approaches, methodologies, resources, etc.
- Exceptions to the requirements, *if applicable*.

### **1. TRAINING REQUIREMENTS**

Contractor will train the JCC and its contractors, if needed, as mutually agreed upon. The Contractor will create, with JCC assistance, the CMS online training program, including support materials, and documentation as desired. The Contractor and the JCC will execute the training program. The Contractor will assist the JCC in the initial training programs until the JCC can fully execute the curriculum autonomously.

### **2. TRAINING ASSESSMENT**

Contractor must conduct a training needs assessment which includes job analysis, job task lists, job breakdowns, as well as court business standards and procedures. The assessment will determine the scope and approach for the training deliverables. The final goal of the assessment is to gain sufficient insight for the creation of an effective training curriculum and appropriate training delivery. Assessment deliverables include but are not limited to:

- **Executive Summary** – Highlighting key findings and training recommendations.
- **Roles and Responsibilities** – Outline the roles and responsibilities of the Contractor and the JCC regarding curriculum development and delivery, training logistics, preparing users for transition and other responsibilities as discussed by Contractor and the JCC.
- **Assessment Data** – e.g., survey results, interview transcripts, field observation reports, etc.).
- **Training Priorities** – Identifying and describing best and most effective opportunities for training and development.
- **Design and Delivery** - Suggested instructional strategies and delivery methods for providing learning experiences that address the JCC’s priorities

### 3. TRAINING STRATEGY

#### A. Contractor to provide the following:

- Detailed pre-deployment training plan to prepare the transition from the legacy system to the new system including existing interfaces, if applicable.
- Pre-deployment change management training plan to prepare for the transition to the new system, if applicable. *Note: the change management training may or may not be done by Contractor. This will depend on what the JCC's needs, what is available, and what Contractor could offer.*
- Detailed go-live (implementation) training plan which includes a training schedule that coordinates with the actual deployment timeline, if applicable.
- Detailed post-deployment plan, if applicable.
- Other training plan(s) as required by the JCC.

#### B. The training strategy should address the following:

- Scope Outline the content of the training in detail, including, but not limited to accessing the system, legacy data and reporting, interfacing and integration with multiple systems, data conversion, document retrieval and caseload processing data e.g., case type, case initiation, monthly invoicing, dispositions, system administration, ad hoc reporting, etc.) The scope should cover all aspects of each screen and system components operationally and functionally. Scope should also include whether Contractor trainer(s) will be onsite during go-live or implementation to address training issues.
- Duration Length of each training session, length of entire training, and when training will begin and end for pre-deployment and deployment phases.
- Audience Define the audience to be trained and how the trainee's position will determine the delivery method (i.e., Role, function, etc.). Identify how Contractor will train Justice Partners including but not limited to scope, duration, and location.
- Logistics Training schedules, training location and rooms, and training hours.
- Equipment Contractor to identify training equipment needs and requirements including, but not limited to product type, version, and/or model number, as well as timing of set up and removal.
- Format Various training delivery methods including, but not limited to train-the-trainer, individual employees in their work environment, group training (JCC staff, contractors, justice partners, and when applicable, others), virtual web/audio/video conference training or other distance learning training methods.
- Approach Customized training design for the JCC and in accordance with JCC standards and procedures. The approach should provide acceptance criteria to measure knowledge transfer and user familiarity and comfort with the new software system including functionality, system maintenance, and operations.

- Delivery Contractor shall deliver the training as specified in the training plan including, but not limited to Baseline End User Training, Specific Case Processing by Functional Area, and System Administrator.
- Post-deployment Plan Post go-live training activities should use similar criteria as with go-live training (i.e., scope, approach, etc.). The plan must include how training will be conducted on legislative updates, enhancements, and upgrades. The Post-Deployment plan must also address when, to whom, and for how long the Contractor will provide training post deployment.

#### 4. **TRAINING MATERIAL**

Contractor will provide training materials and documentation to the JCC in hardcopy and electronically or in a format and quantity that is mutually agreed upon. Contractor agrees JCC can reproduce the training material as needed. Training materials will include, but not be limited to:

- screen shots.
- text instructions.
- quick reference guides.
- e-learning or just-in-time (on demand).
- online manuals, job aids, etc.
- minimal number of screens required to do a task (such as initiate a case).
- data exchanges, interfaces, and invoice processing procedures.
- specific case processing by functional area.
- system administration and Help Desk guides including, but not limited to installation, troubleshooting procedures, system update, ad hoc reporting, tuning, and integrating local components.
- other materials as required by the JCC to ensure the JCC can maintain program functionality.

***END OF APPENDIX***