



MEMORANDUM

To: [REDACTED]
From: Heather Wolfe
Date: [REDACTED]
RE: **Meeting Recap:** [REDACTED]

Per your request, I have summarized the meeting points discussed during your visit last week. Please let me know if you need further information on any of the items.

Job Descriptions. The first step in creating training curricula for all employees is to identify and isolate the core competencies for each position as well as the level of competency required for that job function (i.e. the Accounting staff should have “Regular User” status for the Solomon system, while the Office Manager should have “Expert”). The job descriptions will be used not only to develop requisite and recommended training programs, but will also be instrumental in the recruiting process.

Job descriptions will contain at minimum – the roles and responsibilities; required educational background; core competencies and level of competency required; and the percentage of time spent performing specific tasks/functions. Working with key personnel as noted, I will develop the job descriptions for the following job functions:

- ✓ Office Manager – Bettye Langham
- ✓ Accounting Specialist – Bettye Langham
- ✓ Construction Manager – Ken Sloan/Jerry Strauss/LEAN
- ✓ Project Manager – Ken Sloan/Jerry Strauss/LEAN
- ✓ Scheduler – Becky Benton
- ✓ Draftsman – Larry Mazzenga/Tony Pizzelanti (?)
- ✓ Sales General Manager – Tom Casey
- ✓ Design Consultant – Tom Casey/Ed Kriz
- ✓ Lead Manager – Lisa Hartman/Tom Casey/Mary Lou Teague
- ✓ General Manager – Ken Sloan/Larry Mazzenga
- ✓ Retail Manager – Brad Olson
- ✓ Retail Associate – Brad Olson
- ✓ Service Technician – Brad Olson
- ✓ Receptionist – Bettye Langham
- ✓ Safety Coordinator – Ken Sloan/Jerry Strauss

Orientation Training. In an effort to streamline training, an “orientation” module will be developed to introduce all new hires to the company, and its policies and procedures. The following modules will be developed as part of the new Orientation program:

- ✓ Welcome and Introduction – Appropriate Executive presence
 - Stu’s presentation (amended)
 - Company History
- ✓ The Lean Culture – Martin Iles
 - Lean Initiative
 - The Kaizen
- ✓ Human Resources – Ken Sloan
 - Employee Handbook
 - Operations Manual: Policies and Procedures
 - Benefits/401K and Healthcare
 - Code of Ethics and Conduct
 - Training and Career Opportunities
 - Resources: Contact List, The Intranet, Etc.

Training Database. In order to facilitate learning across the organization, a Learning Management System (LMS) will be developed.

The first phase of the LMS will consist of an in-house training database accessed through the local intranet and maintained by me. The functionality of this system will be limited by the constraints of the intranet system as well as administrative requirements. This system is more accurately referred to as the "Learning Log" as there is no validation of information entered, and it allows only linear data entry. The interface will be comparable to the existing Kaizen database and will track:

- ✓ Employee Name/Division
- ✓ Program Completed
- ✓ Mode of Instruction
- ✓ Date Completed
- ✓ Certification received

If system permits, the following information will also be captured as part of a "Profile":

- ✓ Name
- ✓ Division
- ✓ Job Title
- ✓ Educational Level
- ✓ Degree(s) Received
- ✓ Certifications

According to Al Schultz, the database interface through Microsoft FrontPage (the authoring tool we use) doesn't work well. It is a locked database, and any changes to the structure (i.e. adding new fields, etc.) require rebuilding the database and possible loss of existing information. It is also impossible to track by user. The new intranet server will be running Share Point Services— it is unclear which issues this might resolve and undetermined when this will be implemented.

The second phase of the LMS should be put into place as soon as possible due to the limitations of the intranet-based solution. This evolution of LMS would involve an official LMS system, either ASP-hosted to minimize the IT impact to the company, or licensed, housed and maintained on our intranet server(s). The following minimum requirements should be met:

- ✓ Security:
 - Password and User ID authentication
 - System to help users who have forgotten their password
 - IS integration and security
- ✓ Interface:
 - Custom home page for each user
- ✓ Reporting:
 - Web-based reporting interface
 - Create employee and class reports using a web browser
 - Data-filtering capability
 - Standard and Ad Hoc Reporting
 - Ability to export report data (to Excel, Word, Access)
- ✓ Administrative Features:
 - Web-based access to administrative features, data and reporting
 - Ability to track web-based and traditional (classroom, self-directed, DVD, etc.) learning
 - Student Certification (for course completion)
 - **System is modular, allowing deployment of only required functionality**
- ✓ Communication:
 - Web-based Calendar and scheduling devices

- ✓ Hosting & Support:
 - Internal Network Installation
 - Technical Support available (via phone/email)
- ✓ Content:
 - Launches and tracks web-based learning
 - Interoperability with 3rd party content, including courseware, web-casting, etc.
 - Ability to run web-based courses developed by internal staff
 - Links to other training sites or other resources
 - Ability to run non-standards compliant content (PowerPoint)
 - Student self-registration option
 - Registration confirmation via email
 - Searchable course catalog
 - Ability to set pre-requisites
 - Courses can be grouped into curriculum and topic areas
 - Ability to create Learning Plans
 - Assign students to groups/departments
 - Course rating/Feedback system
 - Ability to import user data from other systems (payroll, etc.)
 - Student transcripts viewable/printable

The final phase of implementation should build on the existing system and address the following advanced requirements:

- ✓ Hosting & Support:
 - ASP Hosting
- ✓ Communication:
 - Electronic discussion boards/Bulletin boards
 - Live web-casting
 - Virtual Classroom
 - Knowledge Database
 - Administrative Features:
 - Enroll and Cancel registration for ILT
 - Customizable naming conventions/rating systems
- ✓ Reporting:
 - Additional custom/ad-hoc reporting
- ✓ Interface:
 - Ability to modify/customize user interface
 - Section 508 compliance (?)
- ✓ Content:
 - Built-in LCMS, Content Authoring Tool
 - Built-in testing and survey creation engine (Tests, surveys, opinion polls)
 - Tests can be auto-graded
 - Can disable a course without removing it from LMS
 - Download capability (for offline courses)

Ideally, the LMS should be connected to an extensive digital library in order to minimize/negate the need for additional 3rd party materials.

I am currently researching available LMS/LCMS systems. Given our requirements, I have narrowed the field at this time to the following providers, and will schedule demos to further eliminate:

- ✓ Geo Learning:
 - GeoMaestro (complete LMS) or
 - GeoExpress (smaller version LMS, but able to upgrade to Maestro when needed)
- ✓ Training Partner
- ✓ Knowledge Planet
- ✓ Solo Learning
- ✓ Macromedia Breeze
- ✓ IBM/Lotus Learning

Training on Intranet. The training portal is ready for management review. Please schedule an appropriate time to review the functionality and site specifics with applicable management personnel via NetMeeting. A quick synopsis of the site and available features follows:

- ✓ **Homepage**
 - Sidebar
 - Links to training materials categorized by Job Function/Training Category
 - Event Planning – Internal and Third Party
 - Recent Events
 - Administrative Files
 - Manuals and Materials
 - DVD Training Series
 - Online Training Forum. Link to all available online training modules.
 - Training Library. Link to all available print manuals and other materials.
 - The Classroom. This will be the portal for the Learning Management System.
- ✓ **Design Consultant Training**
 - New Hire Training:
 - Orientation Syllabus/Checklist
 - Training Manual
 - Construction Inspection Booklet
 - Online Modules/Workbooks
 - SalesLogix Training
 - PoolDraw Training
 - Construction Inspection Booklet
- ✓ **Project Manager Training**
 - New Hire Training:
 - Orientation Syllabus/Checklist
 - Link to DVD series workbooks
 - Training Manual
 - Construction Inspection Booklet
 - Online Modules/Workbooks
 - Electronic Inspection Forms. Download e-forms and print versions.
 - Safety Training
 - Construction Manual
- ✓ **Customer Service Training**
 - Link to the Customer Service Training portal
- ✓ **Safety Training**
 - Policies and Procedures
 - Resources
 - Online Modules/Workbooks
- ✓ **Administrative Training**
 - Other Training:
 - Scheduler Orientation Syllabus/Checklist

- ✓ **DVD Training**
 - Workbooks to go with the various DVD programs
 - Feedback Form
- ✓ **Manuals and Materials**
 - All available print materials
- ✓ **Event Planning**
 - Institute Operations Manual
 - Internal Events Policies and Procedures
 - 3rd Party Rental Policies and Procedures
 - Training Calendar
 - Applicable Forms
- ✓ **Recent Events**
 - Photo Album of Training Events
- ✓ **Administrative Files**
 - Link to training-related files accessible by multiple users
- ✓ **Site Map**
 - Outline list of all available pages.

Projects Update. The following is a list of projects I am currently involved with, or have recently completed:

- ✓ Design Consultant Training – On-going development
 - Created Training Manual
 - Created various new modules (Power Points, handouts, etc.)
 - Developed online/intranet access
 - Preparations for October session (recruiting reminders, travel, planning/reservations, agenda development, etc.)
- ✓ Training on Intranet.
 - See previous outline.
 - Website Development – from scratch
 - Developed all posted materials either from scratch, or converted to appropriate online format from existing documents.
- ✓ Develop Online Forms – Rick Mills
 - Created online versions of Project Manager Forms:
 - Pre-Site Inspection – done
 - Site Inspections – done
 - Construction Checklist – in progress
 - Subcontractor Evaluation – done
 - Elevation and Excavation Approval – done
- ✓ Develop Orientation Checklists
 - Design Consultant Orientation – Ed Kriz
 - Updated to reflect available DVD training
 - Project Manager Orientation – Bill Roberts
 - Created orientation checklist from Lean outline
 - Scheduler Orientation – Becky Benton
 - Created orientation checklist from Lean outline

- ✓ DVD Training Series
 - Project Manager Training – Ken Sloan/Jerry Strauss
 - Created Labels and Covers
 - Labeled and stuffed all sets
 - Managed materials distribution
 - Creating workbooks to follow each chapter – in progress
 - IT Training: PoolDraw, SalesLogix, IT Policies and Procedures
 - Created Labels and Covers
 - Labeled and stuffed all sets
 - Managed materials distribution
 - Creating workbooks to follow each chapter – in progress
 - Retail Training: Water Test, Point of Sale, Manager Applications
 - Created Labels and Covers
 - Labeled and stuffed all sets
 - Managed materials distribution
 - Creating workbooks to follow each chapter – in progress
- ✓ Safety Training – On-going development
 - Created PowerPoint and online presentation(s) for ToolBox Talks
 - Created handouts for SC to distribute during ToolBox Talks
 - Developed online/intranet access
- ✓ Third Party Rentals
 - Hosted London reps – negotiated approval for 2007 and possible expansion of program
 - Revenue and Rental Log attached
 - Developing website – IHS: Patty Daley 407-324-4091
 - Patty to send list of pages
 - Patty to send link to available photography
 - Write copy for all 17 pages
- ✓ Administrative
 - On-going accounting – payables/receivables processing
 - Created GL Tracking spreadsheet for training-related expenses and posted to intranet for easy access – Priscilla Singer/Lisa Hartman
 - Facility management – property management issues: Hufcor lawsuit, air conditioning service, fire alarm system inspections, power outages, server malfunctions, etc.
 - CISCO equipment resale – Tony Pizzelanti/Bill Meyerowitz. Dismantled and stockpiled all phones and one server (Bill dismantled remaining servers and cables); took dismantled equipment and put on pallet/shrink-wrapped for shipping; and coordinated transfer with receiving company and shipping company.
- ✓ A&S Archives
 - Created 60th Anniversary Photo Show – Neil Coyne
 - Scanned in photography to electronic format; created power point show
 - Continuing to frame and display all the archival materials shipped to this location – Tom Casey
- ✓ LMS Research
 - Developed list of potentials
 - Documenting capabilities; developing matrix
 - Requested online demonstrations

As always, it's not an exhaustive list, just the most salient points. Please let me know if you need further detail. Thanks!