Excellence in learning: Learning & Development (L&D) is a key differentiator in recruiting and training staff. Yale is seen as a desirable place to work due to its investment in professional development. Determine the appropriate level of investment for staff development to sustain an effective L&D program.

Complete an assessment of the current state of learning and development and community needs and desires moving forward. Build a strategic plan for learning and development which is understood and supported by University stakeholders and Operations leadership to meet the community’s needs. Create a governance structure and operating structure to maintain alignment over time. Effectively execute, complete, and report on required training for compliance with minimal effort, time, and money, including the support of role-based and unit-specific requirements. Create a sustainable approach to compliance training. Implement a Learning Management Experience (LMX) that makes it easy to learn, track, and report on professional development.

• A comprehensive university strategy for learning and development practices, and implementation of component elements necessary for long term success.
• Balanced set of offerings and training pathways responsive to institutional, unit, and individual development objectives.
• Measurable transparency and equity in distribution of learning and development resources.

Establish broader learning and development culture and infrastructure to advance institutional, departmental, and individual goals and requirements. This includes building governance, infrastructure, and operational support for learning, clarifying the balance of centrally managed and job family or unit-specific learning and development responsibilities, assuring equity of access to learning and development resources to support long-term DEIB goals, and building a coherent method of supporting the whole individual’s development requirements (university goals, unit goal, individual goals). To achieve initiative goals, three workstreams (Learning Standards, Learning Review, and Learning Management Experience (LMX)) have been established.

Learning Initiative – Strategy Overview

EXECUTIVE SUMMARY

GOALS

Excellence in learning: Learning & Development (L&D) is a key differentiator in recruiting and training staff. Yale is seen as a desirable place to work due to its investment in professional development. Determine the appropriate level of investment for staff development to sustain an effective L&D program.

Complete an assessment of the current state of learning and development and community needs and desires moving forward. Build a strategic plan for learning and development which is understood and supported by University stakeholders and Operations leadership to meet the community’s needs. Create a governance structure and operating structure to maintain alignment over time. Effectively execute, complete, and report on required training for compliance with minimal effort, time, and money, including the support of role-based and unit-specific requirements. Create a sustainable approach to compliance training. Implement a Learning Management Experience (LMX) that makes it easy to learn, track, and report on professional development.

BENEFITS

• A comprehensive university strategy for learning and development practices, and implementation of component elements necessary for long term success.
• Balanced set of offerings and training pathways responsive to institutional, unit, and individual development objectives.
• Measurable transparency and equity in distribution of learning and development resources.

IMPACTED STAKEHOLDERS

• All University staff
• All faculty, students, trainees and visitors required to complete regulatory compliance training

SCOPE

• Learning and development goals, strategy, and governance
• Clarification of central vs. distributed governance
• Define/organize learning paths
• Content development and dissemination
• Employee compliance reporting
• Evaluation of current internal and external trainings

OUT OF SCOPE

• Faculty and post-docs non-regulatory compliance training
• New Employee Orientation, onboarding, and development strategy
• Outside vendor training offered by individual departments

LEARNING TEAM

Initiative Sponsors
John Whelan, Jane Savage, Joe Crosby, Deb Stanley-McAuley

Project Steering Committee
Jane Savage, Susan Riggs, Frank Mathew, Ron Lipkins, Stephanie Gosteli, Whitney Bradshaw, Jen Fransen, Rosa Genovesi

Program Lead
Jane Savage

Program Manager
Randy Ritter

Project Leads
Stephanie Gosteli, Ron Lipkins, Deirdre Stowe

Project Managers
Christine Viele, Heather Barnett

Change Management Lead
Kim Belanger

Business Process Lead
Joe Lott

KEY DATES

July – December 2022 Standards Development Strategic Assessment & Planning

November 2022 Phase 1 Workday LMX Go-Live

June 2023 Phase 2 Workday LMX Go-Live
Learning Initiative – Strategic Review Workstream

SUMMARY

Compare Training / Learning & Development (L&D) currently available to Yale staff to “good practices” from Higher Education and other organizations and propose a strategic plan for immediate and future implementation that will meet employee and organizational needs and will differentiate Yale as an employer of choice.

SCOPE  (By December 2022)

• Complete an internal and external scan of all staff training and create an inventory based on criteria (i.e., University level, local level, etc.) and identify what is best in class.

• Understand Yale’s L&D supporting infrastructure, technology, cost, and benchmarks/comparison with other institutions and organizations and propose skateboards.

• Define the University’s strategic, performance and compliance goals, identify met or lagging goals and determine causes for unmet goals in a phased approach.

• Utilize benchmarking, interviews, surveys and research to identify staff knowledge, skills and abilities needed to effectively support and deliver on core skillsets, functional discipline and regulatory compliance.

• Analyze gaps and determine causes (i.e., lack of knowledge, skills, infrastructure, technology, etc.)

• Clarify balance of centrally managed and job family specific or unit specific learning and development responsibilities.

• Assure equity of access to learning and development resources to support long term diversity, equity, inclusion, and belonging goals.

• Draft strategic plan to address systems issues in alignment with other planned strategic initiatives (for example, job families, recruiting, financial controls).

• Establish a check-in cadence with Sponsors to ensure their alignment with team’s discovery and enable shared learning.

GOALS

1. Complete a strategic assessment of Yale staff learning needs including an understanding of current state and design options to get to future state.

2. Establish a systemic approach to supporting and advancing institutional, departmental, and individual goals and requirements through learning and development.

3. Establish a governance structure to ensure effective strategic assessment and effective implementation of strategic plan.

COMMUNICATION PLAN

Organizational Change Management:

• Develop Strategic Review of Staff Learning Roadmap

• Craft and distribute target communications to impacted stakeholders

• Support strategic assessments and planning

IMPACTED STAKEHOLDERS

• All University staff
• All faculty, students, trainees and visitors required to complete regulatory compliance training

OUT OF SCOPE

• Faculty and post-docs non regulatory compliance training
• New Employee Orientation, onboarding, and development strategy
• Outside vendor training offered by individual departments
### Learning Initiative – Learning Management Standards Workstream

#### SUMMARY

Establish learning management standards for use by the learning and user communities.

#### SCOPE

(By June 2023)

- Newly formed Learning Council, consisting of members of the Yale staff learning and development community, to develop alignment on learning standards.
- Develop a high-level work plan to refine business processes and roles.
- Identify, prioritize, and refine learning and development business processes.
- Create taxonomy and definitions (integrated with WD LMX language) for learning management for initial use with the WD learning planning and testing with current courses.
- Ensure refined business processes align with Workday Learning processes.
- Establish design standards including description templates, accessibility, look and feel, and style guides, standard reports and dashboards and align technology to support it (i.e., authoring tools).
- Establish template standards for new courses/requirements.

#### GOALS

1. Refine business processes and roles.
2. Modify the use and application of standards in Workday Learning design.

#### COMMUNICATION PLAN

Organizational Change Management:

- Drive awareness and understanding of new standards and federated system as it applies to Yale staff learning and development across the University.

#### IMPACTED STAKEHOLDERS

- All University staff
- All faculty, students, trainees and visitors required to complete regulatory compliance training.

#### OUT OF SCOPE

- Faculty academic growth and development business processes
- Matriculated program business processes

#### LEARNING COUNCIL

- Human Resources: Jane Savage, Stephanie Gosteli, and James Carpio
- HRSS: Ron Lykins, Whitney-Ann Bradshaw, Amanda Castellano, Christine Viele, Magger Galvan
- HRS/HIPD Diversity: Susan Abramson
- Best Practices: Lorraine Skibtzky (Debra Arcangelo-Vitale)
- Employee Relations – Andrea Terrill
- Workplace Culture: Marinda Monfilston (Debbie Stanley-McAulay)
- Animal Resources Center: Julia Merk
- Development: Dannika Avent
- Digital Accessibility: Michelle Morgan
- EHS / Compliance: James D’Addio, Alyssa Antunes (Stephanie Perry)
- Employee Service Center: Rachel Ianniello
- Facilities: Kara Tavella
- Finance: Karina Julius (Lauren Giaimo)
- Hospitality: Agatha Williams
- Institutional Compliance: Christopher Hanson
- Institutional Equity, Access, and Belonging: Diane Cornelius Charles (Elizabeth Conkin)
- ITS:
  - Office of Project Management: Paul Gruhn (Apriel Biggs-Coker)
  - Office of Change Management: Rosa Genovesi
- ITSS Shared Services: Randall Ritter
- DEVIDS Advancement Systems: Timothy Garrison
- Office of Sponsored Projects: Madison Savage
- Provost Office – Requirements: Cynthia Smith
- Research Compliance Officer, RESORA AVP Research Administration: James Luther
- School of Medicine Administration Learning and Development: Yon Sugiharto
- School of Management – Executive Education: Tracy Sheerin
- Security Operations: Reginald Chavis, Anthony Cuozzo (Thomas Medera)
- Yale Center for Emotional Development: Nikki Elbertson
- Yale Health: Denise Whelan (Lisa Kimmel)

#### SCOPE

- Faculty academic growth and development business processes
- Matriculated program business processes
Learning Initiative – Workday LMX Workstream

**SUMMARY**

Develop and implement a Learning Management Experience (LMX) across the University which makes it easy to learn, track, and report out on professional development. Drive, influence the development of learning and development (L&D) standards and the migration to Workday Learning to ensure it is in alignment with this strategic initiative. Effectively execute, complete, and report on required trainings for compliance with minimal effort, time, and money, including the support of role-based and/or unit-specific requirements.

**SCOPE**  (By June 2023)

- Functional – Learning Core and Extended Enterprise Learning: ~31K+ learners, employees, contingent workers and instructors. ~5K+ learning content
- Develop a categorization of learning terminology and reconcile that with Workday LMS terminology.
- Evaluate current content, build a document repository and status reports and do test management.
- Identify, establish, and map standard processes for including approval of courses and requirements, content administration and responsibilities for content owners.
- Implement design standards including description templates, accessibility, look and feel, and style guides, standard reports and dashboards and align technology to support it (i.e., authoring tools).
- Identify and establish roles for LMX users, administrators, etc.
- Provide support to content owners and IT partners to migrate and manage training.
- Deliver training and support to users in a phased approach – YSM 11/22, University-wide 06/23.
- Ensure the LMX has the capability to be integrated with succession planning, talent planning, and learning management.
- Decommission TMS

**GOALS**

1. Create a governance structure and operating structure to maintain alignment over time.

2. Develop L&D standards to drive migration to Workday Learning.

3. Implement a LMX across the University that is easy to learn, track, and report out on professional development.

**COMMUNICATION PLAN**

Organizational Change Management:

- Drive awareness across the University
- Craft and distribute target communications to impacted stakeholders
- Develop and implement training plan and materials
- Develop and drive rollout campaign

**IMPACTED STAKEHOLDERS**

- All administrative staff
- Faculty administrative/compliance goals only

**OUT OF SCOPE**

- Faculty academic growth and development
- Students with exceptions of student employment role
- Matriculated degree programs