



March 4, 2011

Scott Switzer
Client Representative
Health Care Cooperative (HCC)
2253 E Summit Ave #500
Centennial, CO 80122

Dear Mr. Switzer,

On behalf of Design Solutions Network and in response to your Request for Proposal, I am pleased to present our Initial Learning Plan. This includes:

- Analysis of Training Problem
 - Overview
 - Training needs
 - Client business needs
 - Client technical needs
 - Additional factors
 - Training audience

- Initial Proposed Solution
 - Addressing HCC's specific needs
 - Quality and our approach to instructional design
 - Creating and maintaining a theme

- Key Personnel for the Project

To illustrate our approach and answer any questions you may have, we would like the opportunity to present this Initial Learning Plan to you in an Adobe Connect Webinar on Wednesday, March 9th at 7:00 pm.

The Adobe Connect session can be accessed on Wednesday by using this link:
https://connect.cuonline.edu/designsolutionsnetwork_icp/



ANALYSIS OF TRAINING PROBLEM

Overview:

Currently, HCC provides mandatory ethics training at an annual company meeting. In the past, managers viewed presentations and met with their peers to discuss specific key problems that faced the company. The most consistent, positive comments from employees regarding past training solutions referred to the benefits of peer interaction with managers in other office locations. However, employees also perceived that the training message and the meeting of objectives were inconsistent from year to year.

Training Need and Overview of the Problem:

HCC's current ethics training program for senior and mid-level managers seeks to minimize the risks of potential ethic violations. It received good reviews by employees. However, HCC is seeking to reduce costs and improve the current format. HCC believes that the risk in the areas of "employee personal conduct" (to include promoting a positive work environment and respecting others in the workplace) and "appropriate use of company assets" is too high of a priority to be addressed as it has been during a fraction of the time at some point in a yearly company meeting. Feedback from employees reveals the perception that training has been inconsistent: "somewhat uneven from year to year."

HCC has expressed implicitly that their interest in a training program should be flexible, adaptable, and reusable. Although HCC is focused on the two ethics topics at this time, HCC is also open to expand internal capacity for eLearning in the future if that training solution suits all of their needs.

Client Business Needs:

- Reduce costs
- Minimize potential ethic violations
- Consistent training solutions
- Instructional solutions that are flexible, adaptable, and reusable
- Responsible stewardship of HCC's budget

Client Technical Needs:

Our team seeks to balance HCC's training and business needs with technical needs. To provide further recommendations of technical needs, we will conduct an extended and detailed needs analysis. We will also consider the number of employees, the scope of the project, and existing HCC equipment and resources to assess the constraints and possibilities of the environment.

Additional Factors:

Design Solutions Network has conducted a preliminary needs analysis for the required ethics training. From this initial study emerged a list of additional factors to consider in order to minimize the risk of ethics violations and avoid the potential negative impact on the client's business needs.

- Train new hires
- Increase/space-out training opportunities throughout the calendar year



- Implement a comprehensive ethics curriculum
- Track employee training and completion of instructional objectives

Training Audience:

A target audience with the following characteristics is considered:

- Senior- and mid-level managers who supervise other employees
- Range of ages between 30 and 55
- All English-speaking
- Of diverse racial and cultural backgrounds
- Located in the following cities: New York, Los Angeles, Chicago, Dallas, Denver, Phoenix, Atlanta, and Kansas City

INITIAL PROPOSED SOLUTION

Based upon our preliminary needs analysis we are proposing a blended eLearning solution. Users will access a virtual classroom exclusively online and engage in ethics training at any time of the day within a set course schedule. They will also be able to interact with peers in other offices, via Webinars held at select times of the year. Peer interaction is an element HCC's employees expressed as being the most positive aspect of the previous program. This blended offering of events, instructional methodologies and media, will provide a cost effective solution for HCC and the company managers with engaging and effective training to avoid potential ethics violations.

The environment for this blended eLearning solution can be an LMS, or Learning Management System. An LMS is an online tool that hosts the virtual classroom. The great advantage of an LMS is that users can access training at any time, any place, and at any pace. Another advantage of an LMS is that it can track users and courses, as well as produce a variety of useful reports. An LMS can host synchronous activities such as webinars and chats and provide email communication and other social media tools. Depending on the needs, HCC can acquire an LMS or we can work with a third party LMS as well.

How will this solution address HCC's expressed needs?

- By providing as many training opportunities as needed during the year without the expense of an annual gathering where only a short amount of time can be allotted to ethics training.
- Our handcrafted instructional design solution will place special emphasis in creating relevant and participatory activities that engage all learners and create opportunities for users to connect with peers in other offices while meeting the desired objectives.
- A blended eLearning solution adds value to an investment because it is flexible, expandable, and reusable.



Quality and Our Approach to Instructional Design:

We will design instructional activities while working closely with your content experts. These will include “absorb,” “do,” and “connect” activities to meet the instructional goals. To illustrate this point, here are just some of the examples of what can be done in an LMS.

- “Do” activities can begin with a short interactive quiz where the user will test his or her knowledge and preconceptions of the ethics code in specific work related situations. Not having all the answers to that initial quiz can reduce resistance to the training by provoking curiosity.
- “Absorb” activities can be comprised of a series of videos and presentations of real life scenarios to which users can react and through which they can learn to recognize risks and situations.
- A discussion forum can serve as a place to collaborate, exchange ideas with other peers, and expose users to multiple perspectives. In this forum, they “connect” principles with real world situations. These user-generated scenarios can become part of a catalog of situations that may be reviewed by additional users.
- Interactive games can be embedded in the LMS to help master terms or concepts. Dynamic webinars, where users can play instructional games, can lend a fresh aspect to the virtual classroom providing and reinforcing content while users interact with others in real time.

As stated before, a final instructional solution will depend upon an extended comprehensive needs analysis. Our team uses the A.D.D.I.E. model of instruction. This stands for Analysis, Design, Development, and Evaluation. It is a cyclical model where designers continually revisit the aforementioned processes to meet the instructional requirements while moving from high level to detailed issues to ensure the quality of the product.

Theme:

HCC’s “Do the right thing in all business and personal dealings” motto will serve as a common strand for a training theme.

KEY PERSONNEL:

Our team brings the following strengths to every project:

Nazarena Garrón Ciberay

Client Relations Manager

- Over 12 years experience developing and maintaining relationships with clients through understanding, articulating, and meeting their individual needs
- Attention to detail in analyzing work flow, evaluating systems and formulating plans
- Reliable, research-based recommendation strategies
- Successful monitoring progress against a set of benchmarks and metrics



Carol Komadina Parenteau
Learning Solutions Coordinator

- Wide-ranging experience includes research, development and implementation of face to face, blended, and online instructional content and eLearning design
- Possesses outstanding interest in creating environments that foster learner engagement, success, and overall satisfaction
- Detail-oriented with proven effectiveness to multitask in competitive, high-impact, and fast-paced environment while managing multiple priorities
- Accomplished communicator with excellent oral, written and visual communication skills

Stephanie Johnson
Business Plan Coordinator

- Excellent skills in technical applications to create training
- Vast experience with A.D.D.I.E., Task Analysis, Training Plans, ILTs, OLTs.
- Seven years experience in teaching and education
- Four years experience in eLearning design and development
- Awards: Colorado State University, Media Festival award of excellence 2009 - Q3 eLearning training; DISH Network PAW points; ACSI awarded to DISH Network; Presenter at Demofest 2010

Rhianna Ulrich
Client Presentations Designer

- Over five years of graphic design experience
- Detail oriented with an emphasis on maintaining the integrity of established corporate identities and ideals throughout client materials
- Awards: 3rd Place Winner of the 2004 Imagi-Nations Walt Disney Imagineering International Design Competition; Girl Scout Gold Award; Venture Scout Gold Award

We look forward to illustrating our solution and answering any questions you may have regarding this Initial Learning Plan. Let us know if the Adobe Connect Webinar on Wednesday, March 9th at 7:00 pm. is feasible.

Thank you,

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