CIS Training Project Proposal

Version: 1.0

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1.0   Executive Summary

The merger of the Mid-Atlantic and Southeast divisions occurred to increase effectiveness and efficiency. Every aspect of these entities will be reborn in the new South Atlantic division. This process brings a significant opportunity to improve the PRCs to support organizational goals. Improving CIS training will be critical to reaching a common vision and culture.

1.1   Project Targets

This training project will support the creation of a state-of-the-art mission delivery system within the Quality of Life Center of Excellence. It will improve PRC services and reach a high level of consistency between staff. Moreover, new hires and current employees will engage in a continuous learning process that incorporates their contributions and enables their active learning. Furthermore, the system will utilize current SAD training materials and the most valid adult learning research findings.

1.2   Deliverables

Christopher Lepine will provide project management through all phases until handoff to SAD for maintenance. He will define the project and conduct a needs assessment, design the training system, build and install the system with SAD technical support, provide a marketing plan, and train staff for system use. The system may utilize a CD ROM, an online course management system, and other training materials.

1.3   Benefits

This project will accelerate the creation of state-of-the-art PRCs to bring greater customer service, employee satisfaction, and community support for SAD.

1.4   Implementation

Begun in December 2003, the project design and system development will occur in the summer of 2004. The pilot system launch will be in September 2004 followed by training and a live system launch in October 2004. SAD will then be responsible for continued monitoring, maintenance, and upgrading of the system, training content, and employee education for system use.

This pro bono project will be used as a portfolio artifact by Christopher Lepine. He will own the copyright to the project management web site and all design materials while SAD will own the copyright to the training materials and courses in the system.

2.0   Background and Overview

The new South Atlantic Division (SAD) provides an excellent opportunity to improve services to cancer patients. New training for cancer information specialists (CISs) will be key.

In December of 2003, Patricia Hoge, Chief Mission Officer, met with Christopher Lepine, Instructional Designer, and defined the purpose, goals, objectives, and scope of a proposed PRC training system. This procedures and technology upgrade will affect CIS training at both PRCs. Further discussions with Gail Katz, Meg Garner, Diana Dew, and Kevin Lamartina also informed this proposal for a new training approach and tools.

The merger of the Mid-Atlantic and the Southeast divisions provides several advantages and is transforming the White Marsh and Atlanta Patient Resource Centers (PRCs). Moreover, the formation of the SAD established an atmosphere of change and innovation that is beneficial to improving the performance of the PRCs.

As restructuring unfolds, new staffing will be introduced to the PRCs: Each will be guided by a director, and for calendar year 2004, Atlanta will have eight CISs. White Marsh is projected to expand from four CISs with four to seven additional staff this year as well.

The SAD is pursing several strategic initiatives including State of the Art Mission Delivery. This effort will focus on Patient Resources Centers, Hope Lodges, and Rural Health Initiatives. CIS training must, therefore, *strive for state-of-the-art PRCs* within the Quality of Life Center of Excellence.

2.1   SAD Needs and Suspected PRC Performance Problems

As the merger evolves, CIS training must support four main SAD needs:

- Establish a common culture and set of procedures
- Optimize resources and efficiency
- Improve quality control
- Demonstrate effectiveness to communities served

Conversations with SAD executives and managers overseeing the White Marsh PRC pointed to several possible PRC deficits:

- CISs sometimes miss triggers in phone calls
- Medical terms used by callers are often misunderstood by CISs
- Knowledge of the CRD is moderate
- The positive aspects of some information or SAD efforts are often not stressed with callers, especially when SAD cannot help them

2.2   Project Purpose

This project will support the creation of state-of-the-art PRCs to help achieve the State of the Art Mission Delivery strategic initiative.

2.3　Ensuring Project Success

A 2001 [ASTD](#) and [MASIE Center](#) study found that most e-learning initiatives fail, even when mandatory. "Full participation tended to occur when courses:

- Had an internal champion
- Were tied to performance reviews
- Were not taken at the desk
- Had intense marketing and promotion"

In addition, the study suggests the following best practices (taken from Lance Dublin, 2003):

- Use intentional, dynamic, and continuous marketing activities, as well as traditional marketing methods, such as face-to-face discussions and print advertising
- Create a learning culture: encourage and show appreciation of e-learning
- Develop an environment in which peer support is endemic
- Develop incentive programs such as job ladders and peer recognition

Further, the current proposal believes that successful implementation will depend on firm and representative sponsorship from executives and management and:

- Incorporating existing training content
- An effective implementation strategy
- Proper resources, technical support, and maintenance
- Sustained project management.
- Continuous evaluation, improvement, and upgrades

3.0   Goals, Objectives, and Benefits

3.1   Goals

In order to support the creation of state-of-the-art PRCs, the following goals will be pursued:

- Maintain a high level of CIS and counselor work; maintain excellent quality
- Establish good consistency between CIS and counselor work; staff will understand their roles and relationships

3.2   Objectives

These objectives will enable this project to meet the goals:

- Provide a design for an improved training process and tools
- Base the training system and content on key adult learning research and theory
- Utilize appropriate existing and recommended training technology, tools, materials, and methods
- Provide improved training for new hires
- Incorporate effective staff suggestions
- Establish a maintenance and continuous improvement process for the training system

3.3   Benefits/ROI

The success of this project will provide these key rewards:

- Increased customer service effectiveness and satisfaction
- More community support and contributions to SAD
- Increased morale and job satisfaction for CISs

4.0   Deliverables and Scope of Work

Several SAD needs and possible performance problems have been outlined here. However, while this training project will address many of them, several may be best remedied by management and organizational changes, rather than training: It may be that training cannot address some issues. The Needs Analysis Report listed below will outline what can be helped by training.

The following services will be provided in this training project at the White Marsh, and possibly, Atlanta PRCs:

- Design and development of a training process and appropriate technology tools
- Configuration and implementation of technology
- Design and delivery of learning system documentation and training
- Assistance to staff in using the learning system and inserting and linking to training materials
- Consultation for implementation, marketing, and maintenance of the system

4.1   Definition Phase

The purpose of this phase is to identify the business goal, conduct a needs assessment, do an instructional analysis, analyze the learners and learning environment, and develop learning goals and objectives. The following deliverables will be provided:

- Project Web site
- Initial Parameters Document
  Primary goals and preliminary findings
- Project Proposal (this document)
  Outline for development, control, and execution of project
- Needs Analysis Report
  Summary of performance gaps in light of goals and sponsor organizational purpose

4.2   Design Phase

The blueprint for development of the system will be presented in a Design Plan that will include:

- Instructional tools description and learner expectations for tools
- Content outline
- Sample section
- Storyboards
- Style guide
- System specifications
- Schedule
- Budget
- Team member roles and responsibilities

4.3　　Development Phase

During creation of the training system, SAD will be provided:

- <u>Completed and Approved Content</u>
  All images, multimedia, and text will be produced and inserted
- <u>Look and Feel</u>
  Screens and document formats will be proposed, approved, and created
- <u>Primary Functions</u>
  Programming for all user functions will be tested and completed
- <u>Pilot Systems</u>
  Small portions of the learning tool will be built and tested with users and presented for approval with sponsors
- <u>Full Production and Complete Pilot</u>
  The first version of the learning system will be presented to the sponsors and released for usability testing

4.4　　Implementation and Marketing Phase

After creation and update of the system, Christopher Lepine will provide:

- <u>System Marketing Plan</u>
- <u>Learning System Launch Supervision</u>
  The final, revised version will be released to users
- <u>Learning System User Training</u>
  A training program will be designed and given with accompanying materials

4.5　　Maintenance Phase

After the direction of the project has been given to an SAD representative, SAD will receive:

- <u>System Maintenance Schedule</u>
  The operations and revision plan will be formulated and presented for approval

5.0   Project Timeline

This project has been underway since December 2003. The project timeline shows progress thus far and proposes remaining phases and activities. An updated and expanded version of this timeline is located on the project web site at http://www.cdlsv.com/ACS/sad/cistrain/. The system is projected to launch in October 2004 with continued short-term updates until January 2005. SAD will be responsible for marketing, maintenance, and upgrade evaluations of the system.

Area/Objective/Task	J	F	M	A	M	J	J	A	S	O	N	D	J
Definition	░	░	░	░									
Deliverables													
Project Web Site	░												
Initial Parameters Document		░	░										
Project Plan				░									
Needs Analysis Report				░									
Design					░	░							
Deliverables													
Design Plan							░						
Development								░	░				
Pilot								░					
Full Production									░				
Deliverables													
Completed and Approved Content								░					
Look and Feel								░					
Primary Functions									░				
Pilot Systems									░				
Full Production and Complete Pilot									░				
Implementation & Marketing									░	░	░	░	
Deliverables													
Learning System Launch										░			
Learning System Launch Supervison										░	░		
Learning System User Training									░	░			░
Maintenance													
Deliverables													
Maintenance Schedule									░				

5.1 Project Management and Team

Christopher Lepine is the Project Manager and Instructional Designer under sponsorship of Patricia Hoge, Chief Mission Officer, and Gail Katz, Vice President, Patient Resource Navigation. Additional project team members will be added to fill the following roles as SAD positions are filled:

- Technical Support
- Training Advisement
- Course Development
- Content Creation

5.2 Product Development and Interoperability

This project will seek to maximize existing training and technical resources while providing a flexible system that will work well with other SAD information technology resources. Since proprietary software packages change rapidly and are likely to be cost prohibitive, this project will use the following resources and develop new ones *only when necessary*:

- Existing PRC software such as MS Word and Excel
- Standard technology such as HTML, web graphics, and e-mail
- Existing SAD IT infrastructure
- Existing IT PRC hardware such as laptops
- Existing training content from booklets, handouts, videos, and web sites
- Open source software where needed: the project will find and test free software that can be updated by SAD

6.0   Assumptions and Dependencies

- The system is based on the White Marsh PRC environment
- The system may be deployed to Atlanta and updated to match the environment
- Christopher Lepine will be responsible for directing the following project phases and aspects:
    - Definition
    - Design
    - Development
    - Implementation
    - Marketing
- SAD will be responsible for:
    - Providing and creating all training content, including video and other multimedia elements such as graphics
    - Providing staff to assist with the project
    - Providing IT support to install and maintain project software and hardware
    - Maintaining and updating the system
    - Server and software maintenance and data backup
- SAD will plan and create training courses in the system
- After initial training, SAD will be responsible for additional employee training on the system
- Initial pilot and production launch will be at White Marsh
- System launch will be October 3, 2004

7.0   Terms

7.1   Compensation

This project is being performed pro bono by Christopher Lepine until he completes his M.Ed. program at the University of Delaware on May 28, 2005. Work performed after this date may be billed to SAD upon SAD approval and will require a new agreement.

7.2   Scope Changes

SAD requests for changes and additional work outside of the scope defined in this document will be considered change orders and require change order agreements.

7.3   Licensing and Copyright

SAD will be required to review, approve, and abide by any licensing and copyright agreements associated with project software or training materials such as texts, web sites, or movies. Except for the project web site, design documents, and timeline, documents and deliverables created for this project are the intellectual property of SAD. They may, however, be shared or displayed by Christopher Lepine as examples of his work.

7.4   Warranty

No warranty is associated with any deliverable provided for the project other than those of software packages or other proprietary products used in the training system or content.

7.5   Responsibility for Data Integrity

Christopher Lepine will install the pilot system components, but SAD will assist in the live production system installation and be responsible for maintaining any databases and data backups.

8.0   Agreement Signoff

This agreement is made between the South Atlantic American Cancer Society (SAD) and Christopher Lepine and is incorporated herein by reference.

8.1   Services

Christopher Lepine shall perform the services and provide deliverables in this submitted *Proposal* for said client within stated terms. The project will be performed under the definitions in this proposal.

8.2   SAD Contact

The following contact is the primary sponsor who has reviewed and approved this proposal:

Gail Amalia B. Katz, MHS/Vice President, Patient Resource Navigation

South Atlantic American Cancer Society
8219 Town Center Dr.
Baltimore, MD 21236

Tel: 410-933-5187
Fax: 410-931-6875

THEREFORE, the parties have executed this agreement in duplicate originals:

South Atlantic American Cancer Society	Christopher Lepine
8219 Town Center Dr.	108 Tanglewood Ln.
Baltimore, MD 21236	Newark, DE 19711

South Atlantic American Cancer Society

Name (please print)	**Title**

Signature	**Date**

Christopher Lepine   **Instructional Designer**

Signature	**Date**