



Summit ISD Services
Creating optimal knowledge solutions

Hiring Team Training Redesign **Proposal**

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Version 1.0

Presented to:

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Client Company

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1.0 Executive Summary

Redesigning the *Hiring Team* (HF) training program will enable Client (Client) to improve the performance of hiring teams. It is critical that the right people are hired in the right way. Current hiring teams are displaying varying degrees of performance problems such as asking illegal interview questions, hiring the wrong candidates, and causing a longer-than-needed hiring process. Further, some of the best candidates are not accepting Client offers of employment.

Employees on hiring teams will hire new employees in vary frequencies, and thus have different training and performance support needs. The current traditional instructor-led workshops train about 600 employees each year and are conducted in every region. A redesigned program with other measures will greatly reduce performance problems and enable Client to hire the best candidates who will be more likely to accept these offers.

1.1 Objectives

The purpose of this project is to conduct analysis and instructional design, create new ILT workshops and materials, develop new JIT modules, create all required media assets, and provide implementation support. There are a number of success and risk factors that will be considered in the formal project plan.

1.2 Deliverables

Summit will lead the initial creation of numerous design documents and learning products which include a training needs analysis report, a design concept, instructional objectives and assessments definitions, a curriculum map and design plans, prototypes, pilots, and final versions. The training and performance support components comprise the solution system to address the identified performance gaps. All deliverables will be compatible with the Client LMS and intranet and will be the intellectual and tangible property of Client.

1.3 Pricing Options

Summit is presenting three options based on conversations with the project leader—Frank Client. Each option is comprised of a traditional workshop and materials, along with pre and post-workshop online modules. These modules can also be used for performance support in conjunction with other recommended performance support elements. Option A uses static online modules, Option B uses interactive modules, and Option C uses immersive simulation modules.

Pricing is as follows: Option A is \$50,503; Option B is \$65,990; and Option C is \$87,778. These amounts will be adjusted as needed based on refinements of Client's requirements and choices for bundles of deliverables.

1.4 Timeline and Implementation

The project will take approximately 5 months to complete and have initial components in place in mid-March. In order to meet this March deadline, it is very important to begin at Client's earliest convenience and ensure rapid feedback on project deliverables as they are being created and tested.

2.0 Justification

Client must continually attract and hire the right new talent to pursue its mission and maintain its competitive advantages: this is a significant challenge with a shrinking pool of qualified candidates. With operations in Europe, the Asia-Pacific region, and the United States, Client utilizes hiring teams lead by Hiring Managers. These teams must bring in *the right talent in the right way*. Quite frequently, these teams do not have formal training in the hiring process and its aspects of behavioral interviewing and legal considerations.

These knowledge and skill deficits contribute to several recurring hiring team performance problems which negatively impact the hiring process.

Approximately 600 hiring team employees participated in *Hiring Fundamentals (HF)* training sessions across the enterprise in the past 12 months. The current six HF versions have evolved over the past four years with new content and some instructional changes, as well as localization where needed. Many employees cannot attend these live workshops, and while many are able to attend, it is at significant cost to Client. In addition, Hiring Managers have additional hiring team duties they need to learn and be supported on.

Several other factors need to be addressed: 1) a new employer branding initiative and survey data needs to be integrated; 2) the frequency of hiring team participation by employees varies quite greatly; 3) diversity content should be expanded; 4) social media should be considered; 5) legal questions need to be updated; 6) much content can be removed; and 7) other content changes need to be integrated.

2.1 Performance Problem Indicators

Recent anecdotal and candidate survey data indicate the need to update HF training offerings:

- Illegal interview questions are being asked.
- Many hired employees are not a good technical and/or cultural fit.
- Some of the best candidates are not choosing to join Client.
- The hiring process is often longer than it should be.

2.2 Benefits / ROI

The success of this project will contribute to the following long-term rewards that will emerge in greater frequency:

- Best candidates join the Client team.
- Best candidates are identified based on technical and cultural fit.
- Legal violations in questioning are eliminated.
- Hiring process speed is optimized.
- HF training costs will be reduced.

3.0 Objectives and Strategy

3.1 Objectives

This project is being conducted to improve the hiring process at Client. The project will:

- Redesign the HF training program.
- Develop new ILT workshops and materials.
- Develop standalone online modules for classroom and JIT performance support.
- Create and acquire assets required: images, audio (including voice overs), and video.
- Coordinate testing and revisions of all deliverables.

3.2 Strategy

The project will realize the most rapid and sustainable results by considering the following factors of success and risk:

3.21 Success Factors

Summit ISD Services (Summit) will collaborate with the Client Learning and Development team to utilize:

- Alignment of objectives and project elements with target ROI.
- Sound project management.
- Evidenced-based instructional, instructional message, and elearning design.
- Client SMEs and HF training team–recruiters.
- HF current content.
- Client LMS.

3.22 Risk Factors

The following factors are proposed as having a potential negative impact on the project, and will be mitigated:

- Limited access to SMEs.
- Limited access to stakeholders.
- Delays in acquiring content.
- Delays in receiving feedback and signoffs.
- Resistance from current program providers.
- Changing requirements.
- Multiple revisions.
- New Client technology requirements mid/post-project.

4.0 Scope and Deliverables

4.1 Scope

4.11 Phases

Summit will work with Client through the following project phases:

- Definition and Analysis
- Design
- Development
- Implementation and Promotion
- Maintenance

4.12 Responsibilities

The following services will be provided by Summit:

- Recommendation of a solution system that will meet the project purpose/ROI.
- Design, development, and testing of training and JIT performance support elements—the solution system.
- Definition of the technology requirements for the configuration and implementation of the solution system.
- Design, development, and testing of the solution system.
- Assistance to Client Learning and Development staff in using the solution system.
- Consultation to Client for the implementation, communication, and maintenance of the solution system.

Client will:

- Assist Summit through all project phases.
- Implement, promote, maintain, and evaluate the solution system.
- Design and deliver train-the-trainer offerings.
- Provide or contract for video production and editing services.

4.2 Deliverables

Summit will provide a variety of work products in each phase of the project. These training and performance support elements comprise the solution system. The entire project will be supported by project management documentation and control from Summit.

4.21 Definition and Analysis

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

- Project Proposal (this document)
Outline for development, control, and execution of the project.
- Training Needs Analysis Report
Instructional goal analysis, audience analysis, and cognitive task analysis.

4.22 Design

Summit will collaborate closely with Client to produce the following documents:

- Design Concept
An overview of the proposed system.
- Instructional Objectives and Assessments Definition
- Curriculum Map and Design Plans
Training and performance support element outlines, content to be covered, scripts/specifications, and storyboards.

4.23 Development

Summit will collaborate with Client and provide:

- Completed and Approved Content
All images, multimedia, and text will be produced and inserted.
- Looks and Feels
Screens and document formats will be proposed, approved, and created.
- Primary Functions
All software and other technical functions will be tested and completed.
- Prototypes
Small portions of the learning and performance support tools will be built and tested with users and presented for approval with sponsors.
- Pilot HF Products
The first version of the training and performance support components will be presented to the sponsors and released for usability testing. This includes job aids, online modules, instructor materials, and other elements.
- Final HF Products
Final, updated versions of all ILT materials and collateral, online modules, and job aids.

4.24 Implementation and Promotion

After creation of the solution system, Summit will provide the following:

- Full retesting of all components
- Program assets for use in Client promotion of program
Existing HF images, audio, video, text, documents.

4.25 Maintenance

Summit will continue to support Client on an hourly fee basis by implementing content and functionality updates as specified by Client to all aspects of the system.

5.0 Deliverables and Pricing Options

Deliverables include two rounds of changes/feedback from Client. Summit will employ a rapid feedback system and prototypes during development to assure alignment with Client expectations. All accepted deliverables will require final signoff. Hourly rates will be charged after final signoff if change requested.

5.1 Deliverables Options

Workshop Options (RLOs=Reusable Learning Objects)		
Option A: Static Online Content	Option B: Interactive Online Content	Option C: Immersive Online Simulation
Hiring Team Workshop <ul style="list-style-type: none"> 4 hrs. classroom 2.5 hrs. online 	Hiring Team Workshop <ul style="list-style-type: none"> 4 hrs. classroom 2.5 hrs. online 	Hiring Team Workshop <ul style="list-style-type: none"> 4 hrs. classroom 2.5 hrs. online
Pre-workshop Online Static Modules (1.5 hrs., RLOs)	Pre-workshop Online Interactive Modules (1.5 hrs., RLOs)	Pre-workshop Online Immersive Modules (1.5 hrs., RLOs)
Facilitator Guide	Facilitator Guide	Facilitator Guide
Participant Workbook	Participant Workbook	Participant Workbook
PowerPoint	PowerPoint	PowerPoint
Handouts (RLOs)	Handouts (RLOs)	Handouts (RLOs)
Job Aids (RLOs)	Job Aids (RLOs)	Job Aids (RLOs)
Assessment Instruments/Rubrics	Assessment Instruments/Rubrics	Assessment Instruments/Rubrics
Post-workshop Online Static Content Modules (1 hr., RLOs)	Post-workshop Online Interactive Modules (1 hr., RLOs)	Post-workshop Online Immersive Modules (1 hr., RLOs)
Hiring Manager Workshop <ul style="list-style-type: none"> 2 hrs. classroom 1 hr. online 	Hiring Manager Workshop <ul style="list-style-type: none"> 2 hrs. classroom 1 hr. online 	Hiring Manager Workshop <ul style="list-style-type: none"> 2 hrs. classroom 1 hr. online
Pre-workshop Online Static Modules (.5 hr., RLOs)	Pre-workshop Online Interactive Modules (.5 hr., RLOs)	Pre-workshop Online Immersive Modules (.5 hr., RLOs)
Facilitator Guide	Facilitator Guide	Facilitator Guide
Participant Workbook	Participant Workbook	Participant Workbook
PowerPoint	PowerPoint	PowerPoint
Handouts (RLOs)	Handouts (RLOs)	Handouts (RLOs)
Job Aids (RLOs)	Job Aids (RLOs)	Job Aids (RLOs)
Assessment Instruments/Rubrics	Assessment Instruments/Rubrics	Assessment Instruments/Rubrics
Post-workshop Online Static Content Modules (.5 hr., RLOs)	Post-workshop Online Interactive Modules (.5 hr., RLOs)	Post-workshop Online Immersive Modules (.5 hr., RLOs)

Performance Support / JIT System / RLOs Options (RLOs=Reusable Learning Objects)		
Option A: Static Online Content	Option B: Interactive Online Content	Option C: Immersive Online Simulation
Hiring Team Self/Peer-Assessment Tool	Hiring Team Self/Peer-Assessment Tool	Hiring Team Self/Peer-Assessment Tool
Hiring Team Job Aids <ul style="list-style-type: none"> • Process • Guidelines 	Hiring Team Job Aids <ul style="list-style-type: none"> • Process • Guidelines 	Hiring Team Job Aids <ul style="list-style-type: none"> • Process • Guidelines
Hiring Manager Job Aids <ul style="list-style-type: none"> • Process • Guidelines 	Hiring Manager Job Aids <ul style="list-style-type: none"> • Process • Guidelines 	Hiring Manager Job Aids <ul style="list-style-type: none"> • Process • Guidelines
Hiring Team Modules (2.5 hrs.)	Hiring Team Modules (2.5 hrs.)	Hiring Team Modules (2.5 hrs.)
Preparing for the Interview	Preparing for the Interview	Preparing for the Interview
Conducting the Interview	Conducting the Interview	Conducting the Interview
Evaluation & Selection	Evaluation & Selection	Evaluation & Selection
Hiring Manager Modules (1 hr.)	Hiring Manager Modules (1 hr.)	Hiring Manager Modules (1 hr.)
Preparing for the Interview	Preparing for the Interview	Preparing for the Interview
Conducting the Interview	Conducting the Interview	Conducting the Interview
Evaluation & Selection	Evaluation & Selection	Evaluation & Selection

5.2 Recommended Performance Analysis

Although not requested, it is highly recommended that Client conduct or contract for a full performance analysis of Hiring Managers and their hiring teams. This will help optimize ROI: it will assure a cascade of significant benefits through the entire instructional design and implementation phases. A solution system will be recommended which will address all factors needed to provide maximum ROI from the hiring process.

While Summit is bundling a training needs analysis report, a performance analysis would refresh and widen our shared understanding of associate performance gaps and remedies. It will potentially reveal new factors that could very significantly increase ROI and possibly reduce program development and delivery costs to Client. Further, a good performance analysis will repeatedly pay for itself during development, delivery, and every time an associate is engaged in the hiring process, year after year.

Summit would like to conduct a performance analysis: it would take approximately two weeks to complete for a cost of \$3,500.

5.3 Pricing Options

Pricing shown below is based on research with 249 companies on required production hours for various types of elearning: <http://www.chapmanalliance.com/howlong> These prices were derived from the estimated production hours for Options A-C below and multiplied by an hourly rate of \$75. Client may choose to commit to a flat rate or be billed hourly for a chosen option. Other associated expenses such as travel will be billed separately.

Deliverable	Option A	Option B	Option C
Workshop (includes materials, <i>without</i> online modules)			
Hiring Team Workshop (4 hrs.)	\$7,740 ILT Level 1-Average @60% (estimated at 60% of standard hours due to existing content)		
Hiring Manager Workshop (2 hrs.)	\$6,450 ILT Level 1-Average		
Performance Support (for use in class & JIT)			
Hiring Team Online JIT Modules (2.5 hrs.)	\$23,438 EL Level 1-Complex	\$34,500 EL Level 2-Average	\$50,063 EL Level 2-Complex
Hiring Manager Online JIT Modules (1 hr.)	\$9,375 EL Level 1-Complex	\$13,800 EL Level 2-Average	\$20,025 EL Level 2-Complex
Job Aids & Assessment Tools- Documents (6)	\$3,500	\$3,500	\$3,500
TOTALS	\$50,503	\$65,990	\$87,778
Performance Analysis	\$3,500		
Travel, Lodging, and Meals	TBD		
Stock assets-images, audio, video	TBD		
Recordable Media: CDs, DVDs, DV video tape, etc.	TBD		
Travel Time	\$75/hr.		
Change Orders	Project-based fee TBD or hourly at \$75/hr.		
GRAND TOTALS	TBD	TBD	TBD

6.0 Project Timeline

This project is expected to begin on October 1 and continue until mid-March. *A final, detailed timeline with deliverables will be provided upon final revision of this proposal.*

7.0 Assumptions and Dependencies

- One version of the workshops, job aids, and JIT online modules will be created.
- Client will provide significant staff assistance to Summit during all project phases, especially in acquiring existing content and gaining access to SMEs.
- Client will provide monies to acquire stock assets required in the design such as images, audio, and video files.
- Digital training content and JIT content/job aids will be deployed through the Client LMS–Plateau—which is SCORM conformant, and the Client Intranet.
- Summit will have access to the Client LMS for uploading and testing content.
- Client employees will access elearning and performance support online content on PCs which are running Adobe Flash, Adobe Acrobat Reader, Microsoft Internet Explorer (version 8 minimum), and Windows Media Player (version 11 minimum), and that have audio capability through headphones or speakers.
- The online components of the solution system are not required to run on mobile devices.
- Client will provide testers from each region to review and comment on training and performance support offerings, including online components.
- Client will localize all content as needed.
- Client will be responsible for implementing the solution system prescribed by Summit.
- Client will design and deliver the train-the-trainer sessions.
- Client will deliver and evaluate the program.
- Client will provide video equipment and staff as needed to shoot and edit any custom live sequences.

8.0 Terms

8.1 Scope Changes

Pricing in this proposal includes two rounds of changes to each deliverable. Client requests for changes and additional work outside the scope defined in this document will be considered change orders and require change order agreements and new fees. Deadlines and required resources will be updated and require Client approval.

8.2 Deliverables

Client will review and approve all deliverables. Prototypes of reports, job aids, web sites, project plans, and other elements will be presented and not developed until approved by the sponsor from Client. All materials and products produced by Summit will be so indicated and retain this language. Summit retains the right to share work products with other Summit existing and potential clients.

8.3 Licensing and Copyright

Client will review, approve, and abide by any licensing and copyright agreements associated with project software or training materials such as texts, web sites, vendor solutions, video, or other assets. All work products created for this project such as online courses, booklets, job aids, and design documents are the intellectual property of Client. They may, however, be displayed by Summit as examples of client projects and deliverables.

8.4 Production, Maintenance, and Support

Summit will provide project management and consultation through all project phases and engage other resources as needed. Client will provide significant assistance and carry out post-implementation activities and maintain all components of the solution system. Summit will provide post-implementation support through new contracts/agreements.

8.5 Fees and Payment Options

Client will be billed based on the deliverables and pricing options chosen and as *indicated in the Agreement Signoff* section of this document. There are two payment options: OPTION 1-Client can choose to pay a project-based flat fee or an hourly fee: if the flat fee is chosen, Client will pay no more than quoted amounts, assuming there are no change orders (additional new items, other updates, or scope changes). OPTION 2-If Client chooses an hourly rate, Client will pay \$75/hr. for all activities performed, regardless of estimated costs of deliverables.

The fee-based payment option (Option 1) will require a \$2,000 deposit to begin.

Payments will be made as follows, NET 15 using payment Option 1 or 2 over an estimated 5 months. *When deliverables are chosen by Client in a revision of this proposal, they can be tied as a requirement of payment for each month.*

Payment Option 1		Payment Option 2
Project-based Fee	Amount	Hourly Rate
Deposit	\$2,000	No deposit
Month 1	15% less deposit	Billable hours - unpaid
Month 2	20%	Billable hours - unpaid
Month 3	20%	Billable hours - unpaid
Month 4	20%	Billable hours - unpaid
Month 5	25%	Billable hours - unpaid

8.6 Agreement Changes and Terminations

This agreement may be modified by the mutual consent of the parties and will require their signing of the revised agreement. Summit will submit a final bill for the current agreement based on work performed since the last payment from Client and will receive any outstanding payments due from Client within 15 days after the next monthly Summit invoice. Client will be billed on an hourly basis for any unfinished deliverables.

Client or Summit may terminate this agreement at any time with 30 days notification. All assets and deliverables created will be provided to Client. Summit will submit a final bill based on work performed since the last payment from Client and will receive any outstanding payments due from Client within 15 days of termination of this agreement. Client will be billed on an hourly basis for any unfinished deliverables.

9.0 Agreement Signoff

This agreement is made between Client and Employees (Client) and Summit ISD Services (Summit) and refers to the contents of this proposal. It is the intellectual property of Summit.

9.1 Services and Payments

Summit will perform the services and provide the deliverables in this submitted proposal for Client under the terms described. The project will be performed under the definitions, assumptions, and dependencies listed here. Client will provide support and payment based on the terms of this proposal.

The Client representative has indicated a deliverables selection, payment option, total fees (if Option 1 chosen), and selected start date in the table below. If payment Option 1 is chosen, a \$2,000 deposit will be provided to Summit for work to commence:

Deliverables Selections	
Options: <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C	
Performance Analysis: <input type="checkbox"/>	
Payment Options for Deliverables	
Option 1 <input type="checkbox"/> Project-based Fees \$ _____	Option 2 <input type="checkbox"/> Hourly Rate \$75/hr.
Selected Start Date	

9.2 Project Leads

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

Frank Client
Learning Manager
Client
1000 Mountain View Ave.
Anytown USA
fclient@client.com 303-555-1212

The project contacts below have approved this proposal and will abide by its terms, as acknowledged by their signatures below.

Client

Frank Client
Learning Manager

Signature Date

Summit ISD Services

Christopher Lepine
President



Signature Date