

Lifelong Knowledge & Research, Inc.

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Proposal for Leadership Skill Training

Presented to:

Wallington Bank

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Table of Contents

Executive Summary and Introduction..... 3
Overview..... 3
Requirements 3
Technical Approach..... 4
 Design Approach..... 4
 Milestone 1 - Analysis 4
 Milestone 2 - Design..... 5
 Milestone 3 - Development & Testing..... 9
 Milestone 4 - Implementation..... 9
 Deliverables 10
 Review Cycle of Deliverables 10
Assumptions 12
 Program/Content 12
 Period of Performance 12
 Testing/Implementation 13
 Cost..... 13
 Services Not Provided by LKR, Inc. 13
Personnel 14
Cost 15
Company Information 16
Previous Experience 16

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Executive Summary and Introduction

Overview

LKR, Inc. is pleased to present this proposal for consideration to Wallington Bank of New York. LKR, Inc. will create five hours of Web-based Leadership Skills Training for Wallington Bank within a three month period of performance.

Requirements

The following items have been identified as requirements for the Leadership Skills Training Program for Wallington Bank:

- A self-paced, non-facilitated program that will require 5 hours of time for completion by the learner.
- A web-based interface designed to operate on Wallington Bank's intranet.
- An English and Spanish version of the final product.
- An assessment at the end of the program that will show successful completion of the program to be placed in the employee's personnel file at the discretion of the employer, Wallington Bank.
- Limited travel by LKR, Inc., with most communication being conducted either via email, video conferencing, or phone conferencing.

Technical Approach

Our approach for this project will be based on the ADDIE Instructional Model. The ADDIE model is a systematic approach to the instructional design process which provides us with a framework to ensure that our instructional products are effective, and our creative processes are as efficient as possible. The milestones defined below correspond to the five phases of the ADDIE Model: Analysis, Design, Development, Implementation and Evaluation.

Design Approach

Milestone 1 - Analysis

Deliverable: Analysis Report

The project team will conduct goal, subordinate skills, learner and context analyses to determine the scope of the training as well as the appropriate instructional strategies and assessment methods to use when designing the training. The results will be compiled in an Instructional Analysis Report which Wallington Bank will need to approve for accuracy before Step 2 can begin.

Analysis Report Components

- A goal statement of what the learners will be able to do after completing the leadership training.
- A classification of the goal within an existing learning taxonomy.
- The major steps associated with achieving the main goal of the training.
- Subordinate skills, knowledge, attitudes and entry behaviors the learners will need to complete each major step.
- Key learner characteristics.
- Characteristics of the learning environment including available equipment and resources.
- Compatibility of learning environment with instructional and learner needs.
- Constraints present in the learning environment.
- Characteristics of the setting in which the new skills and knowledge will be used or applied after completing the training.

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Milestone 2 - Design

Deliverable: Design Plan & Static Prototype

Based on the findings in the Analysis Report, the project team will create a Design Plan which will outline specific performance objectives, instructional strategies, and levels of interaction, assessment and media to be utilized for each section of the course. A Static Prototype of the training interface will accompany the Design Plan to illustrate the interface design explained in the plan. Based on the known project requirements, we recommend the following options and would like to further discuss which option will best suit the needs of Wallington Bank.

Option 1

- Timeframe – 3 month time period of working days (5 day per week schedule)
- Interaction - Level 2
 - The learner will have more control of the lesson by interacting with screen icons and other screen objects.
 - The training application will prompt the learner to interact with the computer.
 - The learner's response will be tracked for ICW branching decisions and possibly for 'pass/fail' situations.
- Media - text, basic graphics, charts
- Assessment - performance checklist
- Strategy - Direct Instruction Model

This instructional strategy is designed to facilitate learning through stimulus-response conditioning and generates and sustains motivation through pacing and reinforcement. An outline of the strategy is as follows:

 - **Orientation**
 - Establish lesson content
 - Review previous learning
 - Establish lesson objectives
 - Establish lesson procedures
 - **Presentation**
 - Explain/demonstrate new concept or skill
 - Provide visual representation of task
 - Check for understanding

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- **Structured Practice**
 - Lead group through practice example in lock step
 - Students respond to questions
 - Provide corrective feedback for errors and reinforce correct practice

- **Guided Practice**
 - Students practice semi-independently
 - Circulate, monitor student practice
 - Provide feedback through praise, prompt, and leave

- **Independent Practice**
 - Students practice independently at home or in class
 - Provide delayed feedback

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Option 2

- Timeframe – 6 month time period of working days (5 day per week schedule)
- Interaction - Level 3
 - Training program provides interaction with problem-solving activities such as simulations or scenarios.
 - Training program provides the learner with decision points from which multiple branching will occur.
 - Training program allows the learner an increased level of control over the lesson scenario through peripherals such as light pen, touch screen, track ball, or mouse.
 - Training program presents information which the learner must study, interpret, and use to provide correct responses which correspond to lesson objective cues.
 - Learner responses are tracked from ICW branching decisions and not tracked for scoring.
- Media - text, graphics, charts, audio, video
- Assessment - portfolio
- Strategy - Problem-Based Learning

This instructional strategy focuses on the problem-solving process. An outline of the strategy is as follows:

 - **Start New Class**
 - Introductions
 - Climate Setting (including teacher/tutor role)
 - **New Problem**
 - Set problem and bring problem home
 - Describe the product/performance required
 - Assign tasks
 - Reason through the problem (i.e., ideas/hypotheses, facts, learning issues and action plan).
 - Commitment as to probable outcome
 - Learning issues shaping/assignment
 - Resource identification
 - Schedule follow-up

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- **Problem Follow-Up**
 - Resources used and their critique
 - Reassess the problem (i.e., ideas/hypotheses, facts, learning issues and action plan).

- **Performance Presentation(s)**

- **After Conclusion of Problem**
 - Knowledge abstraction and summary
 - Self-evaluation

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Milestone 3 - Development & Testing

Deliverable: *Functional Prototype*

Upon approval of the Static Prototype, the project team will create a fully functional prototype of one section of the training representative of the project for usability testing and feedback from Wallington Bank.

Deliverable: *Final Product*

The project team will use the feedback gathered from the usability testing on the functional prototype to amend the Design Plan as needed and complete the final product. All necessary programming and media elements will be incorporated to complete the web-based training application. A version of the training application will be uploaded to a staging area on Wallington Bank's intranet for final review and testing.

Milestone 4 - Implementation

Deliverable: *Final Product on Wallington Bank's Intranet*

Once the final product on the staging area has been approved, the Web-based Leadership Training Program will be installed on Wallington Bank's intranet and will be ready for use by management personnel.

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Deliverables

It is assumed that LKR, Inc. will provide the following deliverables and review cycles before, during and after the development of the Web-based Leadership Training Program for Wallington Bank:

- Analysis Report
- Design Plan
- Static Prototype
- Functional Prototype
- Final Product
- Implementation of Final Product on Wallington Bank's intranet

Review Cycle of Deliverables

The following guidelines apply to all deliverables provided by LKR, Inc. for Wallington Bank:

- All deliverables will be sent and responded to via email.
- LKR, Inc. will send Wallington Bank weekly status reports by 5 PM EST each Friday. Status reports will include the week's accomplishments on the product and list issues for resolution.
- Any issues or questions during the development of the product will need to be responded to within 2 business days – by 5 PM EST two days after the status report has been sent (i.e. the first Tuesday of the following week).
- The review cycle for all deliverables, unless otherwise specified, will be 3 business days. A response to each deliverable done by LKR, Inc. will be needed no later than 5 PM EST three days after the deliverable has been sent to Wallington Bank.
- LKR, Inc. will continue to the next phase of the project only after approval is received for the previous phases.
- If LKR, Inc. does not receive a response within 3 business days of sending a deliverable, the final project deadline will be delayed accordingly.
- Once a phase is approved, changes to that phase will not be possible without renegotiation of deliverables, costs, and timeline.
- Other than weekly status reports and the deliverables listed above, no additional deliverables shall be provided by LKR, Inc. Any additional deliverables needed by Wallington Bank not listed in the Deliverables section of the document will require renegotiation of deliverables, costs, and timeline.
- Upon delivery of the final product, 20 days will be allotted for your company to review the final product.

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- Upon approval and implementation of the final product, the source code used during development, along with graphics and media if used in the program, will be supplied to Wallington Bank by LKR, Inc.

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Assumptions

It is assumed that LKR, Inc. will provide the following services before, during and after the development of the Web-based Leadership Training Program for Wallington Bank:

Program/Content

- The scope of this project does not require providing for a facilitator, training for a facilitator, or printed materials to be used for facilitation.
- At minimum, an interactivity level of 2 for the learner in the final product.
- The final product will not be Section 508 or SCORM compliant upon delivery.
- Our Subject Matter Expert (SME) will provide the content necessary to develop the final product. The content will be appropriate age range and ability levels of management personnel.
- Our SME will provide the Terminal Learning Objectives and the Enabling Learning Objectives.
- Once approval has been given on a deliverable by Wallington Bank, no further changes will be made by LKR, Inc. to that deliverable. If it is a critical issue, then discussion between LKR, Inc. and Wallington Bank will be essential to resolve the issue, with no implications that LKR, Inc. will be responsible for making the changes after approval.

Period of Performance

The time period from analysis to implementation will be 6 months, based on a 5 day per week schedule. If the product is required sooner than the level of interactivity can be changed to accommodate a different period of performance.

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Testing/Implementation

Testing and implementation of the final product will be done by LKR, Inc. while working with your corporate network administrator.

Cost

It is assumed that the cost will include travel, support, deliverables as outlined previously, equipment costs incurred during development, and the testing and implementation of the final product on Wallington Bank's intranet.

Services Not Provided by LKR, Inc.

It is assumed that LKR, Inc. will not provide the following services before, during and after the development of the Web based Leadership Instruction for Wallington Bank:

- Program/Content:
 - LKR, Inc. will not provide updates or changes to the final product after the final review cycle is complete.
 - LKR, Inc. will not provide support or maintenance of the final product once the final review cycle is complete.
- Deliverables
 - Other than the deliverables previously stated, no other interim or final deliverables will be supplied by LKR, Inc.
- Testing/Implementation
 - Upon successful completion of testing in Wallington Bank's intranet system, and after the final review cycle, LKR, Inc. will not provide support or consultation for the final product once it is operational after the 20 day review cycle.

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Personnel

Our program managers have a proven track record for completing products on time and within budgets. We have eighteen full time instructional designers, who offer expertise in designing training for military, education, business, hospitality and technical industries. Of the Instructional Design staff, eighty-five percent have their masters' degree and seven percent have their doctoral degree. We have a strong development team consisting of twenty-five people. Our programmers, graphic designers and multi-media design engineers can create and or incorporate existing images, graphics, text, audio, video and animation into engaging, interactive courseware. Our staff includes certified translators to translate courseware into other languages, such as Spanish, Portuguese, Dutch, French, Italian, and Chinese.

To properly develop the five hours of training requested, the project team feels the following personnel are crucial:

- 1 Leadership Skills Expert (SME)
- 1 Program Manager
- 1 Instructional System Designer (ISD)
- 1 Graphic Designer
- 1 Web Developer/Programmer
- 1 Spanish Translator

Additional Personnel as Needed:

- 1 Technical Writer

The Program Manager will oversee the entire project, maintaining the quality you expect while keeping within the budget. The SME will provide the team with the essential content that the Instructional System Designer will need to design the content of the lessons. The ISD personnel will create the material that the Graphic Designer and Web Developer will piece together into an interesting and interactive website. Depending on the content created by the SME and the ISD it may be necessary to include a technical writer to review the quality of the content created.

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Cost

The cost to complete this project, in the period of performance specified above, will be \$250,000.

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Company Information

LKR, Inc. began in 1999 as a result of three women seeing a need for intuitive and creative solutions to various educational needs. Lifelong Knowledge Research, Inc. is the brainchild of Jennifer Forsyth, Kitzzy Aviles and Ryan Leitch. Together they combine more than 15 years of education, graphic design and programming experience.

We are an employee owned company, located in Orlando, Florida. Nestled in Research Park, LKR, Inc. is a company connected to major players in the education, simulation, medical and technology fields. Our state of the art facility and top-notch employees enable us to complete projects in a timely manner and remain competitive with our pricing. We can offer our clients both traditional and non-traditional "out of the box" solutions. We can modernize legacy courseware, produce SCORM compliant products, translate courseware into several languages and provide instructor training courses to ensure a full understanding of the materials being delivered.

We are building bridges between local universities and the corporate world by offering students internships that provide them real-world experience in instructional system design. We have had tremendous success with this program and are proud to be a part of tomorrow's bright minds.

Previous Experience

LKR, Inc. provides 75 % of the corporate training for Proctor and Gamble. This includes extensive new hire training and retention program, diversity training, safety procedures, leadership and management training and job aids for various departments. We maintain their in house learning management system, update courses and assign courses to employees based on their job descriptions. Our new hire and retention program has reduced the turn over of employees by 7% and has 17% of employees furthering their education to improve their job standing within the company.

We transformed the employee training program for Publix supermarkets. This included modernizing their training video library, adding interactive job specific courseware for the various departments within the supermarket, and improving their customer service training. Employee feedback about the improvements to their training was very positive and based on our recommendation Publix has implemented an annual review of their training procedures.

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We are a contractor for Simviation, a leading aviation simulation provider for Delta Airlines. LKR, Inc. provides the instructional courseware that the instructors teach face-to-face, and the developers at Simviation then use our courseware to create virtual instructors to reinforce the face-to-face pilot training.

In conjunction with the University of Central Florida, Center for Hearing Impaired and VisAid, we developed the training tools that aided visually impaired and deaf children's communication using a new COMM board. This community outreach project was extremely rewarding and our employees were thrilled to take part in this monumental task.