Proposal and Project Implementation Deliverables

Item #15 – Training Strategy and Plan

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Request for Proposal (RFP)

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1.0 INTRODUCTION

1.1 Training Overview

Through our experience with large scale counties of education implementation training services, our team will provide planned and effective training to the customer and its local educational agency (LEA) users, while minimizing disruption to their normal business activities and schedules. We fully understand the unique challenges which the customer will face in development and execution of training support implementation across such broad geographical and organization structure. We will apply our lessons learned and expertise to support a diverse and effective training program, while applying risk mitigation tools and techniques.

The training team will provide the training materials and delivery as set forth in this plan to achieve these goals. The Training Plan is intended to provide the framework to prepare the customer's users to understand and use the customer's system.

Implementing the Training Plan will provide relevant training for users to perform their the customer-related activities and duties. By following the Training Plan, the customer's training program will address the following goals and objectives:

1. Provide training to the customer's staff to enhance their ability to use the selected solution for the activities they perform in their primary roles.
2. Execute strategically scheduled training, aligned with the implementation roadmap to maximize effectiveness.
3. Provide multiple training delivery methods to address potential barriers to user access to training.
4. Minimize the disruption to normal business activities due to training.

Training materials will be developed to maximize reusability and ease of modification, as well as to provide supplemental materials such as job aids and desk aids to enhance and reinforce users' the customer's users skills and knowledge.

1.2 Scope

The training scope for the customer's users is highly dependent on impending organizational changes related to functional roles defined by the customer Organizational Change Management (OCM) team. These changes will impact personnel roles and responsibilities and ultimately lead to a finalized role-based curriculum. The training team will work closely with the OCM team to ensure collaboration and integration of the approach among training, communication, and workforce planning activities.

2.0 TRAINING ASSESSMENT STRATEGY AND APPROACH

2.1 Training Needs Assessment

The needs assessment is completed for each position and role. The needs assessment is the base understanding that maps training requirements to each role-based position. Our experience has shown that development of “role-based” training that aligns requirements for each group of individual roles and responsibilities is key in delivery of the most effective training. Each position and their actual role varies and requires tailoring depending on the customer and LEA demographics.

The training needs assessment will be the product of a combined effort of the Organizational Change Management (OCM) team, the Customer Resource Center (CRC), and the training team. The OCM team will document old positions and define new positions through detailed Business Process Reengineering (BPR). These new positions will be included in the Change Management Template organizational structure. Once the new positions are defined, new processes and workflows will be associated to each one.

The “to be” state developed from the BPR analysis will define new roles, responsibilities and workflow. Training seats will then be dictated by the “to be” state.

3.0 TRAINING DELIVERY METHODS, ENVIRONMENTS AND SUPPORT

3.1 Train-the-Trainer

The training team will identify and train the customer end users to support instructor-led training (ILT). Instructors will be selected primarily from among those end users who have recent past professional training experience. End users recommended by the customer who have demonstrated an interest in becoming professional trainers will also be considered.

Instructors selected will participate in a Train-the-Trainer session and other learning activities associated with their assigned curriculum. Learning activities may include completing an overview of their assigned course and completing a walk-though of resources necessary to facilitate their assigned course. Each instructor will receive an instructor guide, participant guide, presentation slides, charts and other tools identified for effective facilitation.

All instructors selected will undergo interview, training, and assessment periods which will allow evaluation of their stated and demonstrated ability to perform to the level expected. All instructors completing the assessment period will be considered permanent hires and receive their instructor certification.

Each instructor must complete the certification process upon conclusion of their assigned learning activities that allows demonstration of effective use of the facilitator tools, system knowledge, and effective knowledge transfer to participants. Instructor certification may include facilitation of selected learning modules, learning activities, the customer's system navigation, and a written or oral examination conducted by the training manager. Upon conclusion of the Train-the-Trainer learning activities, instructors will be provided feedback to address deficiencies in facilitation and skills for effective transfer of knowledge to participants.

3.2 Training Methods

Table 1. Training Methods details the various training methods available to fulfill the requirements of the Training Plan.

Table 1. Training Methods

TRAINING METHOD	DESCRIPTION	STYLES	ADVANTAGES	COMMENTS
Instructor-led (ILT)	Typically in a classroom or webinar based method with training being led by a qualified instructor.	■ Blackboard or whiteboard method ■ Overhead projector method ■ Video portion method ■ PowerPoint presentation method ■ Storytelling method	■ Efficient method for presenting a large body of material ■ It is personal, face-to-face ■ It ensures that everyone gets the same information at the same time ■ Storytelling grabs people's attention	Instructor-led training for the customer's System will be customized and tailored to the intended audience (i.e., end users, super users, technical users) and the specific content. See Appendix B for specific classes.
Computer-based (CBT)	Computer-based training formats vary from the simplest text-only programs to highly sophisticated multimedia programs to virtual reality	■ Text-only Self-paced training in a text-only format ■ CD-ROM A wide variety of off-the-shelf training programs are available on CD-ROM ■ Multimedia. An advanced form of computer-based training that is much more sophisticated than the original text-only programs ■ Virtual reality Three-dimensional and interactive, immersing the trainee in a learning experience	■ Good for helping employees develop and practice new skills ■ Useful for refresher training ■ Applicable to self-directed learning ■ Can be cost-effective because the same equipment and program can be used by a large numbers of employees	One option to augment other types of customer training is to utilize publicly available education resources such as Oracle University Self-Study CD-ROM training. These non-customized training modules are ideally suited to developing core competency in and as a refresher for products like PeopleSoft 9.2.

TRAINING METHOD	DESCRIPTION	STYLES	ADVANTAGES	COMMENTS
Web-based (WBT)	Organizations with employees in a variety of locations rely on web-based technologies to deliver training.	▪ Web-based training Puts computer-based training modules onto the web ▪ Videoconferencing Allows the trainer to be in one location and trainees to be scattered in several locations ▪ Webinars Participants receive live audio training and also follow visual material that appears on their computer screens	▪ Effective for training across multiple locations ▪ Saves on travel expenses ▪ Less expensive way to get training from experts outside the company	Web-based training for the customer will be dictated primarily by geographical limitations. Any instructor-based training that cannot conveniently be located at a single location, will have to be web-based. The type of web-based training used (e.g., webinar) will be dictated by the learning objectives of the particular class. The instruction will be customized and tailored to the intended audience, and be made as interactive as necessary to accommodate the learning objectives. See Appendix B for specific classes.

TRAINING METHOD	DESCRIPTION	STYLES	ADVANTAGES	COMMENTS
Blended Training	Blended training combines instructor-led training (ILT) with training delivered via digital or online methods, typically web-based training (WBT) and/or computer-based training (CBT). Blended training aims to leverage the advantages of both offline and online learning to create a more comprehensive and flexible learning experience	Not Applicable	■ More effective than ILT alone ■ Allows students to work at their own pace while still having access to the instructor ■ More efficient use of instructor's time	The training team will use blended learning for those subjects which are both complex and require a good deal of base knowledge. Digital delivery will be used to address the base knowledge requirements for such courses, while the face-to-face portion while be used to cover the portion requiring more hands-on or instructor feedback/input.
Online Help	Topic-oriented, procedural or reference information delivered via a network	Not Applicable	■ Replaces live customer support for a majority of user incidents/questions ■ Cost effective as content is utilized across the organization ■ Information is easily updated	Products like Oracle User Productivity Kits (UPK) provide a collaborative development environment to create system related assets which are used throughout the project lifecycle. The customer training team will take advantage of UPKs, or other similar products, to record each process and procedure used on the BEST system in support of online help capabilities.

TRAINING METHOD	DESCRIPTION	STYLES	ADVANTAGES	COMMENTS
Quick Reference Guide	These short, one-task reference guides are ideally suited to one-time setup procedures	Not Applicable	▪ Gives end users only the information they need without having to search ▪ Short and to the point makes it less intimidating than a long user's manual ▪ Easy and fast to create	The customer training team will work with the customer to identify those processes and procedures that are candidates for a quick reference guides. The training team will then create the guides and store them in the Customer Resource Center (CRC).

3.3 User Readiness Assessment

The validation of user readiness and their ability to perform their roles with the new solution will require strict enforcement of requirement training attendance. Attendance and completion of each assigned role-based training course will form the basis of end user readiness assessment. As the customer's users complete the instruction, they will be complete a self-evaluation and confirmed as fully prepared to perform their role. Objective assessment of an end user's readiness to transition to the new ERP system will also be performed and will include a role-based competency transition survey administered by the trainer.

3.3.1 Metrics

User readiness metrics will be based on curriculum completion and measured on multiple levels (see Section 8.3). Student completion of training, which will include scenario-based readiness assessments for each module, is assumed to prepare the student to attend the class for the next module. Attendance in all the required modules for the student is assumed to prepare that student for transition to the new ERP system.

3.4 Proposed Environments

To support training, two training environments will be developed and maintained by the SI:

1. The Primary Training environment, which will be used for instructor-led and web-based hands-on end user training. The data used in the Primary Training environment will initially be sample data. As the live system matures, the application code and data in the Primary Training environment will be replaced with code and data from the production environment.

2. The Sandbox Training environment, which will be a mirror of the Primary Training environment. The only difference will be its intended end use. The Sandbox Training environment will be used by the customer and end users to practice what they learned during hands-on training in the Primary Training environment.

3.5 Online Support and Components

In addition to traditional training methods, an online training support structure will be developed and maintained. The following are samples of resources which will be developed to support both traditional training and user self-help.

1. Web-based training modules
2. Customer Resource Center
3. Online help
4. Quick reference guides

4.0 PROPOSED TRAINING PLAN

See Appendix B for The Preliminary Course catalog.

4.1 Process Training

Each role-based business process represented in functional areas deployed within the customer selected solution will require end user training. Our experience suggests the best time to perform the process training is just prior to “go live”. This approach was validated through our experience with another implementation, to have the highest success rate in support user transition from training to “go-live”.

When developing the course curricula, the training team will include process training as a precursor to functional training in each course.

4.2 BEST Project Core Team Training

The customer's project team is considered the “core team” for training purposes. It is comprised of the internal staff (approximately 16) the customer will have on board to support implementation.

4.2.1 Recommended Classes[1]

Training requirements, based upon functionality and roles, will be developed with the customer input. The following courses are those recommended for attendance and completion, to provide the project core team with the knowledge require performing their individual and team roles:

1. ACT-101: A Day in the Life: Accounting
2. BD-101: Managing Budgets
3. BD-102: Budget Reporting
4. BI-102: BI & Reporting Fundamentals
5. DC-101: Data Query & Reporting
6. FIN-101: Navigation: Financial
7. HR-103: A Day in the Life: HR
8. HR-104: Enterprise: HR
9. PAY-101: Navigation: Payroll
10. PAY-103: A Day in the Life: Payroll
11. PAY-104 Enterprise: Payroll

[1] Use or disclosure of data contained on this sheet (Section 4.2.1) is subject to the restrictions on the title page of this proposal.

4.3 Technical Staff

For training purposes, technical staff is considered to be comprised of application developers, database administrators, system administrators and any role which supports the helpdesk.

4.3.1 Recommended Classes[2]

Training requirements, based upon functionality and roles, will be developed with the customer input. The following courses are those recommended for attendance and completion, to provide technical roles with the knowledge required in performing their roles and responsibilities:

1. AD-101: Application Customization: Finance
2. AD-102: Application Customization: Human Resources
3. AD-103: Application Customization: Budget
4. CRC-101: CRC Helpdesk Training
5. DBA-101: Database Administration Fundamentals
6. GIT-101: General IT Helpdesk Training
7. PAT-101: Patch Management Fundamentals
8. SEC-101: Security Workflow Fundamentals
9. SYS-101: System Administration Fundamentals
10. WEB-101: Web Administration Fundamentals

4.3.2 Recommended Training Process Support

It is our recommendation that training process support be a function of the Customer Resource Center (CRC). This will allow alignment of process support with the day-to-day operation of the districts, charters, and community colleges, as well as the customer internal operations. Training process support roles and responsibilities will be developed by our team and submitted to the customer for approval and action.

4.3.3 Recommended Post-implementation Support

Each deployment phase, wave, and cycle includes an approximately 60 day “post” go-live training and support structure. The training team will provide training support for the technical staff and be responsible to execute final training focused knowledge transfer to the customer during this time period. The support will be on an as-needed basis, as determined by the technical staff, for whatever training support is required within the scope of the Training Plan.

[2] Use or disclosure of data contained on this sheet (Section 4.3.1) is subject to the restrictions on the title page of this proposal.

4.4 End User Training

4.4.1 Transition Models

Some stakeholders interpret ERP transition narrowly as hardware and software transition. The focus of transition should be extended to include the broader organizational issues relevant to user adoption. This includes (1) leadership engagement to involve business managers in promoting new technology and ensuring organizational readiness, (2) release strategies designed to optimize end user adoption, (3) communication strategies that prepare stakeholders for the coming change, and (4) training that equips end users to perform tasks with the new technology. In combination, these strategies address the factors that affect organization and site readiness to embrace change in both processes and technology.

A successful transition effort will include the following activities:

1. Familiarizing team members with the application functionality (and of its relationship to the organization's business requirements).
2. Conducting detailed training on the technical architecture and technical components.
3. Reviewing all application documentation to be sure it is complete and available to the transition team.
4. Aligning technical processes such as technical standards, coding guidelines, configuration management, and test procedures.
5. Implementing governance processes such as collaboration, service level agreements, reporting requirements, and escalation processes.
6. Focusing on all the important peripheral aspects of applications management, including the infrastructure supporting the applications and the human resources involved.

4.4.2 Super User Strategy

Super users are end users who will be trained to move through the customer's system training initially and who will consequently be in a position to share helpful hints, tips, and techniques with other end users.

We recommend at least one super user per LEA that can accommodate it, with responsibilities as part of their job description. The training schedule will phase rollout to super users first and leverage their feedback and expertise to tailor training for the remaining end users.

This strategy will support The customer's transition to a self-sustaining model and provide LEAs with in-house expertise.

Super user objectives include:

1. Become the local expert on the customer system.
2. Ensure a smooth transition of end users to the new system.
3. Provide coaching and support to end users as they transition.

The super user objectives will be achieved through the application of a four-step preparation plan:

1. Prepare for change: includes specialized training, understanding user impact, familiarization with available training.
2. Training planning: learn to be a resource for users during their training.
3. Reinforce learning: partake in support channels, help users integrate learning into their daily work process.
4. Provide transition support: familiarization with support materials.

4.4.3 End User Voice Strategy

Educational developments have highlighted the importance of the individual learner to ensure that their views are sought and their individual needs are properly met. An increased focus on learner voice has several benefits. Learners are likely to benefit through the development of a higher quality educational experience. Trainers will benefit in a number of ways, including improved decision-making as a result of better quality information about the student perspective.

Learner feedback is where information from their experiences is collected, analyzed, published and acted on. The training team will use the following tools and techniques to ensure the users' voices are heard:

1. **Voluntary Course Evaluations**: Upon completion of each course, learners will be encouraged to evaluate their course using end of course critiques and/or online form submission.

2. **Learner Surveys**: Electronic surveys into specific areas and issues will be carried out periodically.

3. **Suggestions, Concerns and Complaints:** Learners will be informed early on of the complaints procedure and how they might make suggestions or raise concerns about the training. A learner feedback portal will be made available where they can submit feedback anonymously.

The training team will establish mechanisms to analyze the feedback in terms of:

1. Participant satisfaction

2. Recommendations for course improvement
3. Gaps in the training

These evaluations will be interpreted to support identification and development of potential course modification/improvements.

On an agreed-upon schedule, training delivery and tracking tools will be developed by the training team and submitted to the customer for approval. The progress and impact made within the customer training, along with future developments and recommended modifications, will be included.

4.4.4 Workflow

Many of the daily tasks performed are part of larger tasks that involve several steps and several people working together. For example, when an invoice is entered, an approval and payment process is initiated: someone reviews and approves it and a third person submits payment to the vendor. The term *workflow* refers to this larger process.

As part of the customer's systems implementation, defined workflows will be “programmed” into the system using available workflow tools from the ERP vendor. While the workflow is in essence integrated into the system, it is still important to train those roles that have responsibilities in relation to the workflow process.

The OCM team will be responsible for capturing, developing and documenting workflow configuration requirements, which will then be used for training development. A sample of actions the OCM team will be responsible for include:

1. Design workflow rules
2. Create workflow maps
3. Define user roles

The training team will use this information to create curricula of each course associated with a workflow. This will enable end users to develop particular competency in the workflows relevant to their roles.

4.4.5 Data Query/Reporting Strategies

See the **Business Intelligence and Data Warehouse Plan** for details on the training to develop competency in the areas of data query and reporting.

4.4.6 Post-implementation Training Support

Post go-live support normally extends 30 to 60 days past the go-live cutover date. This provides a window to train employees who were not available for various reasons prior to go-live, as well as provide an opportunity to provide refresher training for end users who may need additional exposure to instruction and material. An integral part of the post go-live support relates to the document control and posting of training material as online help to the end user community. These activities culminate with the transitioning from a project mode status to recurring organizational oversight and maintenance.

4.4.7 Refresher and Reinforcement Training

As it is our intention to offer all end user training within 14 days of “go live.” We understand that there will be instances that will be prohibitive of this timeline. In such cases, tools will be developed and put in place to support any refresher training as required.

In addition, reinforcement training allows a user to retake a module, or a lesson within a module, to improve his or her proficiency in the use of the customer's system. Staff will use WBT to provide reinforcement training. If a user needs reinforcement training or additional/supplemental training, they will be able to launch the WBT course or module corresponding to the training desired. They will not need to complete the entire module, but can navigate to the relevant sections pertaining to their training needs.

4.5 End User Impact Assessment

The objective of end user impact assessment is to provide tangible information on what impact the customer's training renders. The training impact assessment effort is concerned with the impact that training can have on end user job performance and the influence the assessments can have on strengthening the training program. Figure 1. User Impact Assessment depicts the assessment cycle.

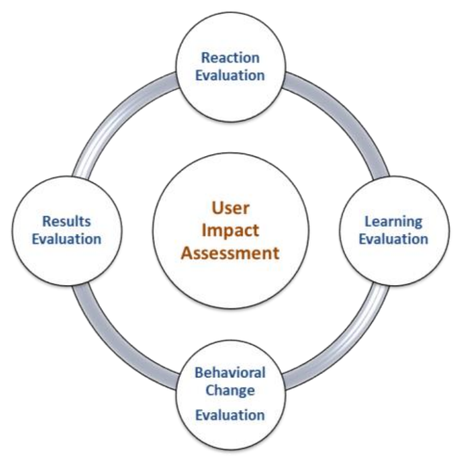

Figure 1. User Impact Assessment

To evaluate training impact, four different levels will be assessed. Each successive level represents a more precise measure of the effectiveness of the training, but at the same time requires a more rigorous and time-consuming data-collection and analysis.

1. **Level 1 Evaluation - Reaction**
   Reaction evaluation measures how the participants react to the training program. It looks at participants’ satisfaction. Training evaluation forms will be collected by the trainers and

consolidated into Excel spreadsheets. These will provide a comprehensive overview of participants' reactions to each of the learning sessions.

2. **Level 2 Evaluation - Learning**
   Learning evaluation attempts to assess the extent to which the trainee has enhanced knowledge or improved skills or attitudes. To assess this level the trainer will conduct comprehensive pre- and post-training evaluation of newly acquired knowledge, skills, and attitudes.

3. **Level 3 Evaluation - Behavioral Change**
   Behavioral change evaluation focuses on the extent to which trainee behavior has in fact changed as a result of the training. It seeks to establish if newly acquired knowledge, skills, or attitude are being applied in the working environment of the trainee. An effective way to minimize the use of resources is to ask the trainees to perform a self-evaluation of their behavioral changes resulting from the training. Questions will be along the lines of "Have you applied anything from the above-mentioned session in your professional life?"

4. **Level 4 Evaluation – Results**
   Results evaluation attempts to assess the organizational results derived from the training, in other words, have there been increased productivity, improved quality, decreased costs and reduced frequency of mistakes?

Managers and other stakeholders will be interviewed or surveyed in order to collect examples and statistics on whether work processes and performance have improved subsequent to staff participation in the trainings.

4.6 Proposed Training Audiences

See Appendix A for the proposed training audiences.

5.0 SPECIALIZED TRAINING

The purpose of specialized training is to prepare the customer end users for the ongoing responsibilities they have within the customer and its LEAs. This training will be developed and conducted as required throughout the project.

Some of the specialized training will be taught using already existing training materials created by the training team for functional training. Other training will require the use of training materials from the software manufacturer in the form of tool user guides, web-based help, and support. These materials may be enhanced or supplemented with customer-specific instruction materials as appropriate.

Other specialized training will use materials created specifically for the tasks by the training team or the technical team working with the specialized users. The training team will design each of the specialized training sessions to address the needs of the customer-specified users who will perform the functions.

Specialized training will be provided either in a classroom with at least two instructors for every 25 trainees or one instructor for 12 or fewer trainees. Some specialized training may be more effectively delivered as hands-on training facilitated by the customer trainers, application developers, technical, or conversion staff who will work with the customer-specified users on how to use the various tools to perform their the customer functions. In these cases a classroom will not be needed. Instead, trainees will shadow and work directly with the appropriate the customer project staff to learn how to use the tools and perform the processes and functions of their role.

The courses will be scheduled in cooperation with the customer to be delivered no more than four weeks prior to when the customer will assume the corresponding responsibilities for the specialized tasks.

No formal assessment will be conducted for users completing specialized training. Users completing specialized training courses will be deemed successfully trained through attendance, participation, and completion in their assigned specialized training courses.

5.1 ERP Help Desk Training

5.1.1 Recommended Development, Staffing, Training and Operation

See the **CRC Strategy & Plan – Building the Organization Plan** for details on recommended development, staffing, training and operation of the ERP Helpdesk, which will eventually be folded into the CRC.

5.2 General IT Help Desk Training

5.2.1 Recommended Scripts and Training[3]

An analysis of existing customer Help Desk operations and capabilities will be performed to determine required training curricula to enable them to support implementation of the solution. At a minimum, the following courses will be are recommended and will be provided to members of the customer's existing General IT Help Desk:

1. GIT-101: General IT Helpdesk Training
2. ERP-101: ERP Helpdesk Training
3. PAT-101: Patch Management
4. SEC-101: Security Workflow
5. SYS-101: System Administration
6. WEB-101: Web Administration

Custom training scripts will be created for the customer's existing IT Helpdesk staff after careful analysis of its operational and technical responsibilities and workflow.

5.3 Payroll Department Special Training

Specialized role-based payroll training curricula for all staff involved in payroll processes will be developed, as required, to address different payroll administration requirements for the various local education agencies (LEA). The specifics of the special training will be determined during the OCM process and will be developed at the appropriate time.

5.4 Retirement Department Special Training

Specialized role-based retirement training curricula for all staff involved in the retirement processes will be developed, as required, to address different retirement reporting requirements to external agencies by the various LEAs. The specifics of the special training will be determined during the OCM process and will be developed at the appropriate time.

5.5 HRS Department Special Training

Specialized role-based human resource system training curricula for all staff involved in human resource processes will be developed, as required, to address different operational reporting requirements for the various LEAs. The specifics of the special training will be determined during the OCM process and will be developed at the appropriate time.

[3] Use or disclosure of data contained on this sheet (Section 5.2.1) is subject to the restrictions on the title page of this proposal.

6.0 TRAINING ROADMAP AND TIMELINE

In order to assure that training is well planned, structured, presented, and documented, the following components will require cross organizational support, as they are critical to its success:

1. Instructors are to be prepared and ready to train.
2. Training materials/content are developed and reproduced.
3. A training database/environment developed and tested.
4. Training facilities scheduled and equipped for training delivery.
5. The training audience scheduled and confirmed to attend training.

Phase, wave, and cycle training schedules will be developed based upon each deployment wave's requirements. This approach enables OCM and implementation teams to support each other's efforts.

The timeline in Figure 2 represents continuous training support for solution implementation.

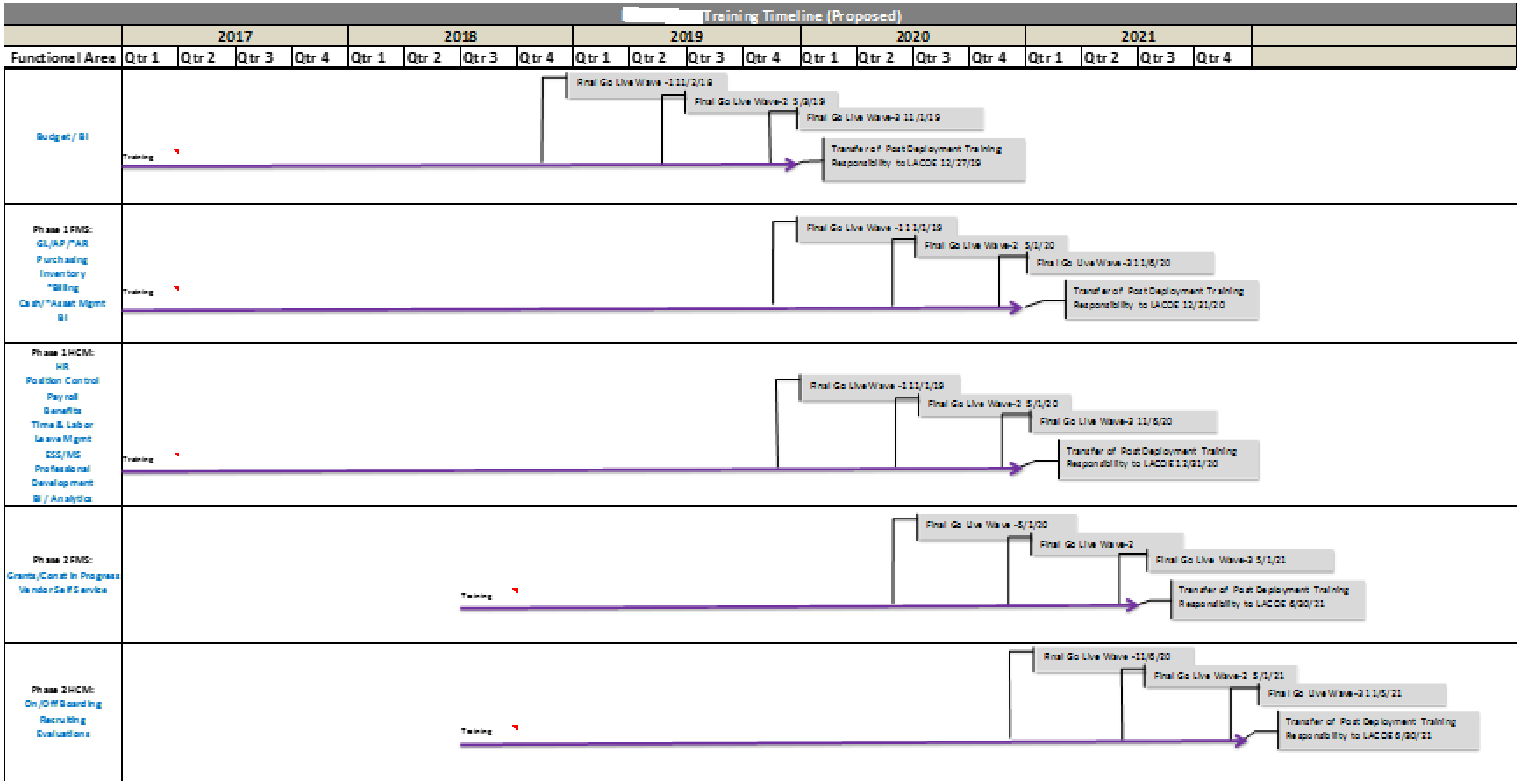

Figure 2. Training Timeline[4]

4 Use or disclosure of data contained on this sheet (Figure 2) is subject to the restrictions on the title page of this proposal.

7.0 STAFFING

7.1 Roles and Responsibilities

Executing the Training Plan will rely on a variety of roles. The roles and responsibilities section provides a table of roles which affect the Training Plan. Table 2. Roles and Responsibilities lists the roles and responsibilities for implementing the Training Plan during Phase 1.

Table 2. Roles and Responsibilities[5]

ROLE	RESPONSIBILITIES
Program Manager	▪ Establishes and maintains the staffing in support of the Training Plan ▪ Supports and champions training
Development Manager	▪ Manages the CRC in coordination with the customer management ▪ Develops the CRC staff ▪ Develops processes and procedures in support of the CRC
Subject Matter Experts	▪ Works with Training Development Analyst to identify essential knowledge ▪ Works with Training Analyst to develop the Training Plan ▪ Works with the Training Development Analyst to develop curricula for training
Training Development Analyst	▪ Assesses what students already know and what they need to know ▪ Bridges the gap between students and trainers ▪ Identifies appropriate tools and methodologies for training delivery
CRC Coordinator	▪ Schedules trainings ▪ Interfaces with the district ▪ Coordinates CRC operations
SI Trainers	▪ Teaches the curricula to the students ▪ Adapt training methods to the learning preferences of the students ▪ Assesses progress to ensure knowledge has been transferred
Trainers	▪ Work alongside the SI trainers to teach classes ▪ Absorb SI trainers knowledge ▪ Learn to teach the curricula without the SI trainers
Students (the customer staff/end users)	▪ Take responsibility for their own learning ▪ Identify learning preferences and any limitations that may require accommodation ▪ Ask questions during training ▪ Self-assess how the learning process is going and seek additional help if needed ▪ Respect the expertise, time availability and preferred communication style of the trainers

[5] Use or disclosure of data contained on this sheet (Table 2) is subject to the restrictions on the title page of this proposal.

7.2 Staffing Levels

As part of the knowledge transfer process, the customer will provide an equal number of trainers as the training team. The customer's trainers will work alongside the training team to absorb their knowledge and assist in the delivery of the training curricula. As each “go live” of the solution concludes, the customer's trainers will transition to and assume the lead role as trainers to support “post” deployment requirements. Table 3. Staffing Levels represents the proposed cross organizational staffing to support training development and execution.

Table 3. Staffing Levels[6]

ROLE	THE CUSTOMER	SI
Program Manager		1
CRC Development Manager		1
Subject Matter Experts		24 (estimated)
Training Development Analyst		2
CRC Coordinator		1
SI Trainers		6
Trainers	6	

[6] Use or disclosure of data contained on this sheet (Table 3) is subject to the restrictions on the title page of this proposal.

8.0 MEASURING TRAINING SUCCESS

8.1 Report on Training Progress

The training team will produce and deliver a weekly training progress report to the customer in an Excel spreadsheet format. The training team will work with the customer to decide what metrics to include in the report. At a minimum, the weekly report will include the following information:

1. % of classes held = classes held ÷ classes scheduled x 100
2. % of students trained = students trained ÷ students scheduled x 100
3. Total number and category of staff trained
4. Material covered

While a Learning Management System (LMS) is not required to deliver these weekly reports, the training team recommends that eventually the customer invest in an LMS to manage the learning environment.

8.2 Measuring Learning Outcomes

Training modules will include an assessment component. The assessment component will include questions and simulated activities. Training developers will design the questions and activities to assess whether the trainees retain the main concepts and can execute the functional steps necessary to complete related functional business processes trained in the module.

The results of the assessment will only be used as feedback to identify opportunities for course improvement.

8.3 Metrics

Metrics will be of vital importance to the customer's project to ensure necessary attendance and measure the effectiveness of training activities. Two categories of metrics will be collected, analyzed, tracked, and reported during the customer's implementation: attendance metrics and effectiveness metrics.

For instructor-led classes, the training administrator will monitor end-user sign in sheets, administer and review course evaluations, and track the score of in-class assessment exams. For web-based training (WBT) classes, customer IT services can monitor if a particular user was logged in to a class and that log can be used in place of the sign in sheet.

Effectiveness metrics will be reported to the OCM team, as well as to the training developer and extended training development team members as part of the defined iterative training development approach to optimize the training experience and course materials.

The following top-level metrics will be collected and reported annually, at year-end. The intent of capturing and analyzing these metrics is to provide insight necessary for proactive training planning and budgeting and to provide a means of monitoring the status of the customer's training program.

1. Total training hours per employee, calculated semi-annually using the following formula:

$$\frac{\text{Total training hours}}{\text{Employee population}} = \text{Total training hours per employee}$$

2. Percent of employees trained, calculated using the following formula:

$$\frac{\text{Number of Trainees}}{\text{Employee population}} = \text{\% of employees trained}$$

3. Required course evaluation average, provides feedback on course content, relevance and instructor competency:

   Rated on a 1-5 scale, with 5 being excellent

4. Course sessions completed, captures employee use of courses:

$$\frac{\text{Number of courses completed}}{\text{Employee population}} = \text{\% of employees taking courses}$$

5. Course completion, measures percent of courses started that are completed by the students:

$$\frac{\text{Total completions in all courses}}{\text{Total enrollments in all courses}} = \text{\% of courses completed}$$

9.0 COST ESTIMATION

See **Proposed Cost Schedule** for the cost breakout of the Training Plan.

APPENDIX A. PROPOSED TRAINING AUDIENCES[7]

TRAINING AUDIENCE	ESTIMATED AUDIENCE SIZE	SUBJECTS/ COURSES	DURATION (DAYS)	TIMING*	EXPECTED TRAINING DELIVERY METHOD	MAX # OF ATTENDEES/ CLASS
BEST Project Core Team	16	ACT-101 (A Day in the Life: Accounting)	3		Blended	30
		BD-101 (Managing Budgets)	4		ILT	20
		BD-102 (Budget Reporting)	4		Blended	20
		BI-102 (BI & Reporting Fundamentals)	5		Blended	10
		DQ-101 (Data Query & Reporting)	7		Blended	15
		FIN-101 (Navigation: Financial)	0.5		WBT	U
		HR-103 (A Day in the Life: HR)	3		Blended	30
		HR-104 (Enterprise: HR)	3		ILT	20
		PAY-101 (Navigation: Payroll)	0.5		WBT	U
		PAY-103 (A Day in the Life: Payroll)	3		Blended	30
		PAY-104 (Enterprise: Payroll)	3		ILT	20
Senior Mgmt. IT	250	GIT-101 (General IT Helpdesk Training)	5		CBT, ILT, WBT	20
		PAT-101 (Patch Management)	5		Blended	10
		SEC-101 (Security Workflow)	3		Blended	10
Applications/ Technical Architects	10	TBD by SI				
Web Developers	10	WEB-101 (Web Administration)	3		Blended	10
Operations Staff	16	CM-102 (Contract Mgmt for Managers)	2		WBT	U
		PRO-102 (Review & Approve POs)	2		ILT	20
		TAL-102 (Managing Timesheets)	1		ILT	20
Database Administrators	5	DBA-101 (Database Administration)	5		Blended	10

[7] Use or disclosure of data contained on this sheet (Appendix A) is subject to the restrictions on the title page of this proposal.

TRAINING AUDIENCE	ESTIMATED AUDIENCE SIZE	SUBJECTS/ COURSES	DURATION (DAYS)	TIMING*	EXPECTED TRAINING DELIVERY METHOD	MAX # OF ATTENDEES/ CLASS
System/Application Developers	30	AD-101 (Finance Customization)	5		ILT	10
		AD-102 (HR Customization)	5		ILT	10
		AD-103 (Budget Customization)	5		ILT	10

TRAINING AUDIENCE	ESTIMATED AUDIENCE SIZE	SUBJECTS/ COURSES	DURATION (DAYS)	TIMING*	EXPECTED TRAINING DELIVERY METHOD	MAX # OF ATTENDEES/ CLASS
Senior Mgmt	640	ABM-102 (Absence Mgmt Approval)	1		ILT or WBT	25
		AM-102 (Asset Mgmt Approval)	1		WBT	U
		BI-101 (BI Navigation and Dashboard)	1		WBT	U
		HR-105 (HCM Manager's Self Service)	1		WBT	U
		PAY-101 (Navigation: Payroll)	0.5		WBT	U
		PAY-102 (Payroll Self Service)	0.5		WBT	U
		TAL-102 (Approving Timesheets)	1		ILT	20
End Users (District Staff)	600	ABM-101 (Absence Mgmt Input)	3		ILT	25
		GL-104 (Enterprise: GL)	3		ILT	20
		HR-104 (Enterprise: HR)	3		ILT	20
		PAY-104 (Enterprise: Payroll)	3		ILT	20
		PRO-103 (Enterprise: Purchasing)	2		ILT	20
		TAL-103 (Enterprise: Time & Labor)	4		ILT	20
Super Users	100	AP-102 (Advanced AP)	2		ILT	25
		AR-102 (Advanced AR)	2		ILT	25
		DQ-101 (Data Query & Reporting)	7		Blended	15
		GL-103 (Advanced GL)	3		ILT	20
District End Users	5,000	ACT-101 (Day in the Life: Accounting)	3		Blended	30
		EP-101 (Enterprise Portal Navigation)	0.5		WBT	U
		HR-101 (Navigation: HR)	0.5		WBT	U
		HR-102 (HCM Employee Self Service)	1		WBT	U
		HR-103 (A Day in the Life: HR)	3		Blended	30
		PAY-101 (Navigation: Payroll)	0.5		WBT	U
		PAY-102 (Payroll Employee Self Service)	0.5		WBT	U
		PAY-103 (A Day in the Life: Payroll)	3		Blended	30

TRAINING AUDIENCE	ESTIMATED AUDIENCE SIZE	SUBJECTS/ COURSES	DURATION (DAYS)	TIMING*	EXPECTED TRAINING DELIVERY METHOD	MAX # OF ATTENDEES/ CLASS
		TAL-101 (Time and Labor)	0.5		WBT	U
District Super Users	500	AP-102 (Advanced AP)	2		ILT	25
		AR-102 (Advanced AR)	2		ILT	25
		DQ-101 (Data Query & Reporting)	7		Blended	15
		GL-103 (Advanced GL)	3		ILT	20
BI/ Reporting Managers, the customerSuper Users	100	BI-101 (BI Navigation & Dashboard)	1		WBT	U
		BI-102 (BI Fundamentals)	5		Blended	10
BI/ Reporting District Super User	400	BI-102 (BI Fundamentals)	5		Blended	10
ERP Help Desk Staff	10	ERP-101 (ERP Helpdesk Training)	5		ILT	20
General IT Help Desk Staff	20	GIT-101 (General IT Helpdesk Training)	5		CBT, ILT, WBT	20

* Classes will be scheduled as follows:
1.) September through November
2.) January through June

* Classes will not be scheduled as follows:
1.) November through December will not be scheduled due to the holiday time and
2.) June through July due to the fiscal year closing

APPENDIX B. PRELIMINARY COURSE CATALOG[8]

TRAINING AREA	COURSE NAME	AUDIENCE	COURSE ID	DELIVERY METHOD	DURATION (DAYS)	MAX ATTENDEES*
Absence Management	Absence Management Input	District Staff	ABM-101	ILT	3	25
	Absence Management Approval	District Management	ABM-102	ILT or WBT	1	25
Accounting	A Day in the Life: Accounting	District users, core team	ACT-101	Blended	3	30
Accounts Payable	Maintain and Approve AP Vouchers	Accounting technicians	AP-101	Blended	1	25
	Advanced Accounts Payable	Super users, district super users, accounting managers	AP-102	ILT	2	25
Accounts Receivable & Billing	Online Items & Online Payments	Accounting technicians	AR-101	WBT	1	
	Advanced Accounts Receivable	Super users, district super users, accounting managers	AR-102	ILT	2	25
Asset Management	Asset Management Fundamentals	Accounting technicians and clerks	AM-101	WBT	2	
	Asset Management Approval	District management	AM-102	WBT	1	
Banking	Banking Fundamentals	Finance analysts	BAN-101	Blended	2	30
Benefits Administration	Benefits Administration Fundamentals	Human resource technicians and benefits technicians	BA-101	Blended	3	20
Budget Development	Managing Budgets	People who work on the budget, core team	BD-101	ILT	4	20
	Budget Reporting	Finance analysts, core team	BD-102	Blended	4	20

8 Use or disclosure of data contained on this sheet (Appendix B) is subject to the restrictions on the title page of this proposal.

TRAINING AREA	COURSE NAME	AUDIENCE	COURSE ID	DELIVERY METHOD	DURATION (DAYS)	MAX ATTENDEES*
Business Intelligence & Reporting	Business Intelligence Navigation and Dashboard	Managers, directors, etc.	BI-101	WBT	1	
	Business Intelligence & Reporting Fundamentals	Super users and district super users, core team	BI-102	Blended	5	10
Commercial Claims	Commercial Claims Fundamentals	Procurement people	CC-101	Blended	2	30
Compensation	Compensation Fundamentals	Human resource managers	CMP-101	Blended	2	30
Contract Management	Contract Management Fundamentals	Contract analysts and procurement analysts	CM-101	Blended	3	20
	Contract Management for Managers	Contract and procurement managers, operations staff	CM-102	WBT	2	20
Data Query and Reporting	Data Query and Reporting	Super users, district super users and managers, core team	DQ-101	Blended	7	15
Enterprise Portal	Navigation: Enterprise Portal	All users	EP-101	WBT	0.5	
Financial	Navigation: Financial	All financial users, core team	FIN-101	WBT	0.5	
General Ledger	Access Accounting Information	Financial analysts	GL-101	Blended	0.5	30
	Create & Maintain Journal Entries	Accounting technicians	GL-102	ILT	1	30
	Advanced General Ledger	Super users, district super users, accounting managers	GL-103	ILT	3	20
	Enterprise: General Ledger	District staff	GL-104	ILT	3	20
Human Resources	Navigation: Human Resources	All users	HR-101	WBT	0.5	
	Human Capital Management Employee Self Service	All users	HR-102	WBT	1	
	A Day in the Life: Human Resources	District users, core team	HR-103	Blended	3	30

TRAINING AREA	COURSE NAME	AUDIENCE	COURSE ID	DELIVERY METHOD	DURATION (DAYS)	MAX ATTENDEES*
	Enterprise: Human Resources	District staff, core team	HR-104	ILT	3	20
	Human Capital Management Manager's Self Service	Supervisors and managers	HR-105	WBT	1	
	Maintaining Employee Positions, Status Changes and New Hires	HR Technicians	HR-106	ILT	3	25
	Position Management Including Budget and Approvals	HR Technicians	HR-107	Blended	2	25
	Special Training: Human Resources	HR technicians and managers	HR-108	Blended	TBD	TBD
Inventory	Inventory	Inventory clerks	INV-101	ILT	1	30
Payroll	Navigation: Payroll	All users and managers, core team	PAY-101	WBT	0.5	
	Payroll Employee Self Service	All users and managers	PAY-102	WBT	0.5	
	A Day in the Life: Payroll	District users, core team	PAY-103	Blended	3	30
	Enterprise: Payroll	District staff, core team	PAY-104	ILT	3	20
	Payroll Administration	Payroll Technicians	PAY-105	ILT	5	30
	Payroll Adjustment, Schedules, Retro Pay and Year End Processing	Payroll Technicians	PAY-106	ILT	5	30
	Special Training: Payroll	Payroll technicians and managers	PAY-107	ILT	TBD	TBD
Procurement	Procurement Fundamentals	Inventory Clerks	PRO-101	Blended	3	20
	Review and Approve PO Amounts & Chart Fields / RFQs	Procurement managers, operations staff	PRO-102	ILT	2	20
	Enterprise: Purchasing	District staff	PRO-103	ILT	2	20
Projects and Grants	Projects and Grants Fundamentals	Financial managers	PAG-101	ILT	5	15
Reconciliation & Review	Reconciliation and Review Fundamentals	Financial analysts and managers	RAR-101	Blended	2	30

TRAINING AREA	COURSE NAME	AUDIENCE	COURSE ID	DELIVERY METHOD	DURATION (DAYS)	MAX ATTENDEES*
Retirement	Retirement Reporting Fundamentals	Human resource technicians	RET-101	ILT	3	20
	Special Training: Retirement Reporting	Human resource technicians and managers	RET-102	ILT	TBD	TBD
Revenue and Apportionment	Revenue and Apportionment Fundamentals	Financial analysts and managers	RAP-101	Blended	2	30
Third Party Reporting	Third Party Reporting Fundamentals	All user classified for 3rd party	TPR-101	CBT	2	
Time and Labor	Entering Elapsed or Punch Time	All users	TAL-101	WBT	0.5	
	Managing and Approving Employee Timesheets	Managers, operations staff	TAL-102	ILT	1	20
	Enterprise: Time and Labor	District staff	TAL-103	ILT	4	20

TRAINING AREA	COURSE NAME	AUDIENCE	COURSE ID	DELIVERY METHOD	DURATION (DAYS)	MAX ATTENDEES*
Technical Training						
Application Development	Application Customization: Finance	Application developers	AD-101	ILT	5	10
	Application Customization: Human Resources	Application developers	AD-102	ILT	5	10
	Application Customization: Budget	Application developers	AD-103	ILT	5	10
ERP Helpdesk	ERP Helpdesk Training	All CRC staff	ERP-101	ILT	5	20
Database Administration	Database Administration Fundamentals	Database administrators	DBA-101	Blended	5	10
General IT Helpdesk	General IT Helpdesk Training	IT staff	GIT-101	CBT, ILT, WBT	5	20
Patch Management	Patch Management Fundamentals	IT staff	PAT-101	Blended	5	10
Security Workflow	Security Workflow Fundamentals	Security assigned roles	SEC-101	Blended	3	10
System Administration	System Administration fundamentals	System administrators	SYS-101	Blended	3	10
Web Administration	Web Administration Fundamentals	Web administrators	WEB-101	Blended	3	10

* CBT and WBT max attendees are assumed to be unlimited

APPENDIX C. TERMS AND DEFINITIONS

The following table is a summary list of terms and definitions, as they pertain to this training plan.

TERM	DEFINITION
Assessment	An evaluation of a user's skill/knowledge level or readiness to engage in new job duties.
Blended Training	Delivering training with a combination of instructor-led classroom training and digital or online technology.
Business Process Reengineering	Analysis and redesign of workflows within and between enterprises in order to optimize end-to-end processes.
Computer-based Training	Training that is available on a user's computer that is not necessarily connected to the Internet or intranet.
End User	Any individual who will interface with the customer's system and receive training.
Environment	A combination of hardware and software, designed for a specific purpose, physically and logically isolated from other hardware and software.
Instructor-led Training	Refers to classroom training.
Metrics	A quantifiable measure businesses use to track, monitor and assess the success or failure of a process.
Organizational Change Management	An organized set of activities and initiatives designed to prepare the organization and personnel within the organization for a defined set of changes.
Customer Resource Center	Internal hub that provides online and in-person solution support to various stakeholders.
Web-based Training	Training that is available via the Internet or intranet.
Workflow	A series of activities and approvals that are necessary to complete a task.

APPENDIX D. ASSUMPTIONS

The assumptions and constraints for the Training Plan include:

1. The customer will provide internal resources and staffing to support training, as outlined in the training plan.
2. At the conclusion of customer-wide training, the customer will take possession of and store all training records.
3. Customer-provided end user equipment for web-based-training (WBT) will meet the following minimum requirements:
   a. Include a flash player – recommend Adobe Flash Player version11.9;
   b. Include a browser – recommend IE version 9 or later;
   c. Network capacity to support concurrent access to WBT by users enrolled during any given training period.
4. The customer will provide trainers familiar with current business processes.
5. The customer's facilities will be used for all classroom training.
6. The customer will be responsible for managing the room reservation, the training registration process, and the related communications.
7. Trainers will utilize the customer resources to print and produce training materials.
8. It is expected that information contained within this Training Plan will change over time as the customer's project progresses through the various stages of the implementation.
9. The customer is responsible for providing the LMS.

APPENDIX E. ACRONYMS

The following acronyms are used in this Plan.

ACRONYM	DEFINITION
ADA	American with Disabilities Act
BPR	Business Process Reengineering
CBT	Computer-based Training
CRC	Customer Resource Center
ERP	Enterprise Resource Planning
ILT	Instructor-led training
LEA	Local Educational Agencies
LMS	Learning Management Plan
OCM	Organizational Change Management
PM	Program Manager
SI	Systems Implementer
UPK	User Productivity Kits
WBT	Web-based Training