

LEARNING AND DEVELOPMENT NEEDS ANALYSIS

PROPOSAL SUBMITTED TO:



THE SCHOOL DISTRICT OF PALM BEACH COUNTY

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WEST PALM BEACH, FL 33406

BY:



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MARCH 2, 2005

CONTENTS

- 1.0 The Need
- 2.0 The Recommended Approach
- 3.0 Responsibilities
- 4.0 Deliverables
- 5.0 Financial Considerations
- 6.0 Qualifications

1.0 THE NEED

An organization's employee group is one of its most valuable assets. While financial resources are often directed toward technology, tangible assets, and salaries, too often the intellectual capital of its employees is untapped.

The School District of Palm Beach County recognizes the importance of nurturing its employees. Strides have been made to anticipate and satisfy the needs of its teachers. A curriculum is in place that, while it is still evolving and maturing meets many of the job-related developmental needs of teachers.

Now efforts are being directed toward non-teaching personnel. Ten classifications of personnel have been identified in the School District of Palm Beach County of which nine are considered non-teaching positions. They represent administrative, information technology, bus driver, school police, custodians, food service, tradesmen (electricians, carpenters, etc.), media clerks, and management professionals. These groups represent almost 9,000 employees who support over 10,000 teachers.

It has been clearly recognized that improvement in performance can be enhanced by offering effective learning and development opportunities for non-teaching professionals. Acknowledging the link between its performance management system and professional development, the School District of Palm Beach County intends to improve its offerings to the non-teaching professionals. The acknowledgement of the need to improve the non-educators' professional development speaks volumes of how the School District staff recognizes ways to improve the already high standing the school system enjoys to move it toward the ultimate vision of being best-in-class.

2.0 THE RECOMMENDED APPROACH

The long-term objective of the School District of Palm Beach County is to complete the development and implementation of a comprehensive curriculum for its non-teaching employees. The comprehensive curriculum would enable employees to participate in job-related and/or job advancement learning and development activities aimed at improving performance on the job or preparing the individual for their next job assignment.

Most large corporations such as Motorola, Ryder, Florida Power & Light, and American Express have implemented such an initiative. Several steps are necessary to realize the implementation of a comprehensive curriculum initiative. Generally the strategy follows this sequence:

- 1- Perform a training needs analysis.
- 2- Identify the learning and development gaps that are surfaced by the needs analysis.
- 3- Source or design and develop learning and development interventions.
- 4- Deliver the interventions that are made available.
- 5- Measure or observe the results of the interventions to verify performance improvement or preparation for new job assignments.
- 6- Modify the learning and development interventions if necessary based on analysis of their success.
- 7- Continue to monitor through on-going feedback the effectiveness of the learning and development curriculum and modify it accordingly.

Other initiatives can be undertaken to incorporate the learning and development curriculum into the employee performance development and evaluation process. Examples of such initiatives are:

- ensuring that a learning and development plan are part of the performance review process
- implementing electronic analysis tools that will help employees and managers identify learning and development deficiencies and then source interventions that will help resolve those deficiencies
- broadening the e-learning opportunities for all job classifications
- developing a comprehensive electronic tracking system for performance measurement and learning and development goals and objectives
- incorporating a self-directed learning process into the performance evaluation system so that employees can take more ownership of identifying and satisfying learning and development deficiencies

These are just some of the things that can be done to make the performance management system more comprehensive.

As outlined in the strategy section at the top of page 4, the first step in order to implement a comprehensive curriculum for non-teaching employees is to complete a learning and development needs analysis. Durr & Associates recommends the following strategy for conducting this analysis:

- Implement the needs analysis in phases for optimum effectiveness. Given the sheer number of job positions and the total number of employees in non-teaching positions, it is prudent to target a manageable audience to pilot the needs analysis process. Since the School District of Palm Beach County is under increased scrutiny (Scripps, shortage of classrooms, shortage of teachers, etc.), we suggest that the first needs analysis be conducted with employees within one of the non-teaching employee classifications who have a great deal of interaction with customers (community leaders, media, etc.).
- With the School District of Palm Beach County's input, prepare a methodology of various information gathering techniques to assess a representative sampling of the targeted audience.
- Develop the assessment tools (survey, interview questionnaire, and/or observation checklist).
- Implement the information gathering methodology. Oversee distribution of surveys. Conduct interviews and on-the-job observations.
- Compile results and prepare Summary Report.
- Review the Summary Report. Prepare tailored Executive Overview for executive management and/or Board outlining next steps and recommendations.
- Proceed to the next Phase that targets a different non-teaching audience group. (Prepare a list of the other target groups needing assessment, and prepare a priority list with the District staff).
- Refine the methodology and tools as warranted.

3.0 RESPONSIBILITIES

Well-executed training needs analyses require a systematic approach. Given the number of non-teaching positions within the school system, the geographic disbursement of these positions and the sheer number of incumbents within each position/level underscore the need for a well-orchestrated process. The School District of Palm Beach County and Durr & Associates must act as collaborative partners with specific responsibilities. These responsibilities include those noted below:

3.1 Durr & Associates' Responsibilities

- Conduct the need analysis in a professional manner with minimal interruption to the workplace and respectful of employees' time. If necessary, Durr and Associates reserves the right to add additional resources of their choice to ensure adherence to the scope and schedule of this project.
- Submit the interview questions, observation checklists, and/or survey tools to School District staff for review prior to their use with the target audience.
- Develop a detailed summary report, recommendations for creating a learning curriculum for the selected audience groups, and a proposed action plan for targeting additional audience groups.
- Alert the School District of Palm Beach County in a timely manner of any issues that surface that may alter the procedure, timeline, or budget before proceeding further.

3.2 The School District of Palm Beach County's Responsibilities

- Provide documentation and other background information pertaining to the non-teaching positions pre-selected by the School District of Palm Beach County. This information would include the number of employees per job code, job descriptions, performance management process and blank forms, customer satisfaction survey results, availability of existing training or coursework, organizational charts, and organizational goals and objectives.
- Help Durr and Associates identify and arrange for a sample selection of managers, supervisors, and employees to participate in the needs analysis.
- Collaboratively identify means in which the needs analysis will be performed based on target audience(s)' availability, access to technology, and other factors influencing participation.
- Serve as union intermediary if necessary if the target audience includes union members.
- Designate _____, as representative of the Palm Beach County School District, to serve as the contact project manager for Durr and Associates and be present at all project reviews with authority to sign off at specified stages of development.
- Adhere to specified time lines for turnaround of all draft materials.

4.0 DELIVERABLES

The deliverables associated with the Recommended Approach are detailed below:

4.1 Methodology

The methodology will utilize a variety of information gathering techniques including observation, interview, and survey (paper or technology-based depending upon the targeted audience group). The methodology will take into account time requirements, environmental concerns, and any other attributes/issues relevant to the targeted audience group(s).

4.2 Information Gathering Tools

The various tools (checklist, survey, and interview questionnaire) will be developed and reviewed with the School District of Palm Beach County prior to their use. These tools will explore various areas such as:

- Incumbents' perceived needs and expectations.
- Incumbents' learning style preferences.
- Anticipated learning environment.
- Management's goals/objectives, expectations, and requirements.

4.3 Summary Report

Once the information gathering has been completed, Durr and Associates will compile a summary report that recaps the quantitative and qualitative data. The report will outline recommended actions for compiling a curriculum that meets both the incumbent's and the organization's needs. The report will also suggest refinements to the methodology and tools for subsequent training analyses of other non-teaching positions. Systemic issues affecting job performance may surface during the needs analysis and they will be documented in the summary report and may include suggested options to deal with but will be beyond our responsibility to implement a remedy.

4.4 Schedule

The following schedule identifies tentative delivery dates and is highly dependent upon the selection of targeted audience group(s) and accessibility of requested background information. A detailed time line will be provided with the contract.

<u>Phase</u>	<u>Anticipated Timeframe after order to proceed</u>
Methodology	Week 4
Information Gathering Tools	Week 6
Implementation of Tools	Week 10
Summary Report	Week 12

5.0 COMPENSATION

The cost for development of the methodology, information gathering tools, and summary report is detailed below:

The first targeted audience will require the most intense effort, with analysis and modification of the tools and techniques used for the first group being applied to subsequent groups.

The cost of each phase will not exceed the following schedule:

<u>Phase I</u> <u>First Target Group Analyzed</u>	<u>Not to Exceed</u>
Methodology	\$8,000
Information Gathering Tools	\$4,000
Implementation of Tools	\$8,000
Summary Report	\$4,000
TOTAL	\$24,000

An agreed upon invoicing and payment schedule will be determined once the final agreement is signed.

The assumptions made in arriving at this proposal are:

- Up to three managers and/or supervisors of the targeted job will be interviewed.
- Three to five employees will be observed for one hour each.
- Three to five employees will be interviewed in person or via telephone.
- Twenty to fifty employees will be asked to complete a survey of up to fifty items.
- Up to four client meetings will be held to discuss the methodology, review information gathering tools, go over results, and deliver a presentation of the summary report to the School District of Palm Beach County senior management team and/or Board.

Additional target groups will be cost estimated separately based on group size and ability to reuse and redesign tools and techniques employed in analyzing the first target group.

Incidental, directly related project expenses including travel, telephone, reproduction, delivery, postage, and meals (during travel) will be reimbursed at cost.

All quotations are valid for 60 days from the date of this proposal.

6.0 QUALIFICATIONS

Durr & Associates is well qualified to assist the School District of Palm Beach County in developing a learning and development curriculum and incorporating it into the District's performance management system. This curriculum will outline recommended learning paths for professional development and will be tailored by job title/classification.

As such, the first step is to conduct a training needs analysis in which, at a minimum, the following is identified and defined:

- Incumbents' learning style preferences.
- Incumbents' perceived needs and expectations.
- Anticipated learning environment.
- Management's goals/objectives, expectations, and requirements.

Richard Durr and Marianne Caspar have experience in conducting training needs analyses for large organizations such as, Ryder System, Inc., Motorola, American Express, and other Fortune 500 companies. Their resumes are attached and references will be provided upon request.

Richard E. Durr, Ed.D.
Vice President, Durr and Associates, Inc.
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Education

- Doctor of Education, Educational Leadership, Florida Atlantic University, Boca Raton, FL (1992)
- Master of Science, Management Science, State University of New York, Binghamton, NY 1980)
- Bachelor of Science, Social Science (Summa Cum Laude), State University of New York, Utica, NY (1976)

Experience

- Vice President, Durr and Associates, Inc., Wellington, Florida (2002 – present)
- Director, Design and Development Centre, Motorola, Inc., Motorola University, Boynton Beach, FL (1993 - 2002)
- Instructor in Florida, Illinois, New York (1978 - present)
- Human Resource Manager, Motorola, Inc., Schaumburg, IL (1988 - 1993)
- Manager, Technical Publications, Motorola, Inc., Plantation, FL (1985 - 1988)
- CAD/CAM Instructor, Motorola, Inc., Plantation, FL (1982 - 1985)

Major Areas of Expertise

Experienced in project management, e-learning systems design and implementation, instructional systems design and development, computer graphics, network systems design and implementation.

Learning and Development

Curriculum development, course delivery CAD/CAM system for Motorola mechanical, electrical, and software design engineers. Self-directed learning process and system development and implementation for Motorola Paging Products Group global operation of 30,000 employees.

E-Learning

Project manager for development and implementation of Motorola e-learning system and process for 140,000 global employees producing over 50 products.

Design Standards

Project leader for developing Motorola University courseware design and development standards and guidelines.

Network Systems Project

Project manager for Motorola Communications Sector networking and communications system integration and infrastructure installation for 50,000 global employees.

Past and Current Memberships/Associations/Activities

- Adjunct professor, Florida Atlantic University
- Junior Achievement at H.L. Johnson Elementary School, Royal Palm Beach, FL
- Presenter at various e-learning and self-directed learning conferences and symposia
- Board of Directors, WXEL Public Broadcasting Station, Boynton Beach, FL (1997-99)

Major Papers and Publications

Integrating e-learning with current learning methods, Online Learning Conference, London (2002).

Expatriates, Culture, and Self-Directed Learning Readiness at Motorola, Fifteenth International Symposium on Self-Directed Learning, Boynton Beach, FL (2000).

Does culture make a difference in self-directed learning readiness?, Eleventh International Symposium on Self-Directed Learning, Kissimmee, FL (1997).

Global rollout of self-directed learning by Motorola, Inc.'s Paging Products Group, Ninth International Symposium on Self-Directed Learning, February, West Palm Beach, FL (1995).

Integration of self-directed learning into the training and education process at Motorola, Eighth International Symposium on Self-Directed Learning, West Palm Beach, FL (1994).

Self-directed learning readiness and job performance at Motorola, New Ideas about Self-Directed Learning, Long & Associates (1994).

Readiness for self-directed learning and selected personnel variables at Motorola, Inc., Seventh International Symposium on Self-Directed Learning, West Palm Beach, FL (1993).

An examination of readiness for self-directed learning and selected personnel variables at a large Midwestern electronics development and manufacturing corporation. Dissertation Abstracts International, 53/06A (1992).

Marianne M. Caspar
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Jupiter, FL 33458
561-329-3743

Education

- Master of Science in Education, Instructional Technology and Design, University of Miami, Coral Gables, Florida
- Bachelor of Science in Education, Elementary Education, Cum Laude, University of Miami, Coral Gables, Florida

Experience

- Independent Consultant , Jupiter Training Solutions, Jupiter, Florida (2004 - Present)
- Senior Instructional Designer/Performance Consultant, Ryder System, Inc., Miami, Florida (1999 – 2004)
- Manager, TSC Design and Instruction American Express TRS Co., Inc., Plantation, Florida (1991 – 1994)
- Vice President Director, Training and Development AmeriFirst Bank, Miami, Florida (1990 – 1991)
- Project Manager (1988 - 1990), Instructional Designer (1984 - 1988) Instructional Design Group, Inc. (IDG), Morristown, New Jersey

Major Areas of Expertise

Experienced in performance improvement consultation, workshop and self-instructional course development, technical training, training management.

Performance Improvement Consultation

Performed performance improvement consultation and developed custom sales, new hire orientation, customer service, supervisory, technical, and change management training interventions for companies in numerous industries including: transportation, beverage, managed care, petroleum, manufacturing, construction, and telecommunications. Clients included: Delta Airlines, FPL, PBS The Business Channel; Ryder System, Inc.; TSI, Inc.; Ashland Petroleum; CSR America, Inc. (SAP training); and CIGNA Dental Health.

Workshops and Self-Instructional Course Development

Developed, piloted, and co-facilitated numerous workshops and self-instructional courses for all levels of sales professionals within the FMS division including Vehicle Sales Opportunities, Building Executive Relationships, Sales Training for Account Reps, Professional Rental Operation and Sales Training, Ryder Training and Development Business Process.

Technical training

Managed the development and maintenance of all technical training for three national Telephone Service Centers (TSC); maintained four print-based and on-line procedural and promotional reference documents; and coordinated instruction initiatives at the Southern Region Operations Center. Led a team of ten instructional designers, CBI designers, methods analysts, and instructors within a semi-autonomous team environment.

Major accomplishments include:

- Maintenance and redesign of six-week multi-media new hire curriculum to incorporate major system and procedural changes.
- Conversion of an existing 200+ page reference manual to an EPSS tool.

Coordinated all training functions for a 3.5MM Savings and Loan with 1300+ employees and an annual training budget exceeding \$400M. Managed a staff of 20 managers, instructors, course developers and administrative support. Developed and implemented all retail banking technical, supervisory/managerial, and PC training at four fully equipped training sites. Conducted on-going organizational training needs analyses and presented recommendations and budgetary requirements.

Managed all phases of instructional development within the training consulting environment from proposal creation to program evaluation.

Other Project Examples

Customer Services Training/New Project Training for American Express
Orientation and Technical Training for AT&T
Organizational Needs Analysis for Citicorp
Technical Training for Exxon
On the Job Training for J.P. Morgan
Management Training for Johnson & Johnson
Sales/Technical Training for Merck

Past and Current Memberships/Associations/Activities

Honors

- 1982 Recipient of the "Most Outstanding Student in Elementary Education" Award (Nominated and Elected by University of Miami Faculty)

Memberships (Current and Past):

- International Society for Performance Improvement (ISPI; formerly NSPI)
- Society for Human Resource Management
- American Society for Training and Development (ASTD)