

Internal and External Training Plan

for

The State of Indiana

**Case Management and
Labor Exchange System**

November 3, 2022



SIGNATURE PAGE

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Table of Contents

| | |
|--|-----------|
| INTERNAL TRAINING PLAN | 1 |
| Introduction..... | 1 |
| A. Training Timeline | 3 |
| B. Training Materials to Support Implementation | 4 |
| C. Description of Training Sessions..... | 5 |
| D. Training Confidentiality..... | 8 |
| E. Sandbox Training Environment..... | 8 |
| F. Variety in Training Formats..... | 9 |
| G. DWD Support in Training Activities..... | 11 |
| H. Maintenance and Updates of Training Materials..... | 12 |
| EXTERNAL TRAINING PLAN | 13 |
| A. Training Timeline | 13 |
| B. Training Materials to Support Implementation | 14 |
| C. Description of Training Sessions..... | 14 |
| D. Training Confidentiality | 14 |
| E. Variety in Training Formats..... | 15 |
| F. DWD Support in Training Activities | 20 |
| G. Maintenance and Updates of Training Materials | 20 |

Internal Training Plan

Provide a sample Training Plan that delivers adequate and thorough training of all DWD personnel including DWD systems support resources as well as all DWD Workforce professionals. This Plan must include:

- A. A timeline for all training activities*
- B. A list of all training materials that will be developed to support initial implementation*
- C. A description of the type of sessions that will be provided (e.g. in person, virtual)*
- D. Confirmation that training will be void of any personal identifying data*
- E. Confirmation that a sandbox environment will be available for DWD staff to train in*
- F. A description of the types of training materials that will be developed for users who learn in a variety of formats*
- G. A list of the DWD resources needed to support in all training activities*
- H. A description of how training materials will be maintained/updated over the lifecycle of the system.*

Introduction

Geographic Solutions fully meets this requirement. Because DWD's current system is Geographic Solutions' *VOS Sapphire 22* hire solution, the training needed for DWD personnel, including support resources, would only need to be focused on the new, enhanced functionality introduced in *VOS Sapphire 22*.

Therefore, Geographic Solutions will provide an updated sample Training Plan that delivers adequate and thorough training of all DWD personnel, including DWD systems support resources, as well as all DWD Workforce professionals. This Plan will include:

1. A timeline for all training activities.
2. A list of all training materials that will be developed to support initial implementation.
3. A description of the type of sessions that will be provided (e.g. in person, virtual).
4. Confirmation that training will be void of any personal identifying data.
5. Confirmation that a sandbox environment will be available for DWD staff to train in.
6. A description of the types of training materials that will be developed for users who learn in a variety of formats.
7. A list of the DWD resources needed to support in all training activities
8. A description of how training materials will be maintained/updated over the lifecycle of the system.

Geographic Solutions understands that a crucial piece of the Case Management and Labor Exchange System Project is the knowledge transfer to the Indiana Department of Workforce Development (DWD) to use *VOS Sapphire* effectively. We have an outstanding record of providing training and knowledge

transfer support for customers across the country. The Training Team members have experience using and implementing Geographic Solutions' systems in many different workforce development settings.

The fact that Indiana currently uses the *VOS Sapphire* system provides a significant benefit for its end users. This will enable Geographic Solutions (working with our partner Knowledge Services) to provide training opportunities that draw upon the staff's existing capabilities and skills. In many respects, the initial training we will provide may serve as refresher training for most participants. This will enable existing Indiana staff to remain up-to-date with and fully informed of the many new features in *VOS Sapphire*, while new staff members can leverage the training to build the confidence and know-how to meet DWD staffing requirements.

This training opportunity represents a huge return on investment for DWD and the State of Indiana, as opposed to staff start-up training with a new vendor and a new system. *VOS Sapphire 22* represents an upgrade that will not require a paradigm shift for Indiana staff, case managers, service providers, job seekers, or employers. Cultural and organizational change management requirements will be minimal because the State of Indiana has already embraced our flagship product, and nearly one thousand Indiana staff members use this solution every day to meet the needs and requirements of their customers. The new system features introduced to staff will highlight the many improvements made to increase staff efficiency while decreasing staff effort, thus maximizing DWD's value proposition if it selects Geographic Solutions as the winning vendor.

Knowledge Services as a Subcontractor

Geographic Solutions is proud to announce our partnership with Knowledge Services, a certified woman-owned business enterprise (WBE) located in Indianapolis, Indiana, that focuses on IT staffing and vendor management solutions in both the public and private sectors. Together we will prepare agency staff and project stakeholders for the transition to the next version of our *VOS Sapphire* application.

In the sections that follow, we will describe our approach to client training and explain how we will meet the related training requirements of this RFP.

Our Training Approach

[Redacted content]

[Redacted content]

[Redacted content]

[Redacted content]

A. Training Timeline

Provide a sample Training Plan that delivers adequate and thorough training of all DWD personnel including DWD systems support resources as well as all DWD Workforce professionals. This Plan must include:

A. A timeline for all training activities

Geographic Solutions will align the training plan and validate major milestones to support end user training timelines. The approved training plan serves as the blueprint for all training deliverables. We will keep the plan current with State-approved changes as additional information is available in subsequent phases of the project. Geographic Solutions will ensure that all training deliverables conform to the timelines from the State-approved Project Schedule. Training normally occurs just prior to system deployment/system upgrade so participants do not forget details between the end of

training and the Go Live date. However, Geographic Solutions can modify this project deliverable to fit the needs of DWD, if necessary.

B. Training Materials to Support Implementation

Provide a sample Training Plan that delivers adequate and thorough training of all DWD personnel including DWD systems support resources as well as all DWD Workforce professionals. This Plan must include:

B. A list of all training materials that will be developed to support initial implementation

As part of the approved project plan, Geographic Solutions will maintain a list of all training materials that will be provided to support initial implementation of the *VOS Sapphire 22* upgrade. The following is a list of training materials we recommend to support the knowledge transfer effort conducted by Geographic Solutions:

To access a description of the training materials we intend to develop, please see [Section F – Variety in Training Formats](#) below.

C. Description of Training Sessions

Provide a sample Training Plan that delivers adequate and thorough training of all DWD personnel including DWD systems support resources as well as all DWD Workforce professionals. This Plan must include:

C. A description of the type of sessions that will be provided (e.g. in person, virtual)

[REDACTED]

[REDACTED]

Pre-Deployment Training Provided

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

- [REDACTED]
- [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Proposed Training for the State of Indiana

Under the guidance of the Geographic Solutions Project Manager, the Geographic Solutions Training Team will coordinate all training efforts with the appropriate State staff. The appropriate State staff will be informed of all training requirements by Geographic Solutions' lead instructor and/or developer.

Geographic Solutions will ensure that the training delivery conforms to the State-approved training schedule, which Geographic Solutions will document formally in the State-approved project schedule.

[REDACTED]

The following table displays the core training deliverables that Geographic Solutions initially provides for the system upgrade deployment event:

D. Training Confidentiality

Provide a sample Training Plan that delivers adequate and thorough training of all DWD personnel including DWD systems support resources as well as all DWD Workforce professionals. This Plan must include:

D. Confirmation that training will be void of any personal identifying data

Geographic Solutions securely protects all customer data, so all training materials will be devoid of personally identifying information (PII) and will instead be constructed using pseudo data.

[Redacted]

E. Sandbox Training Environment

Provide a sample Training Plan that delivers adequate and thorough training of all DWD personnel including DWD systems support resources as well as all DWD Workforce professionals. This Plan must include:

E. Confirmation that a sandbox environment will be available for DWD staff to train in

[Redacted]

[REDACTED]

[REDACTED]

[REDACTED]

F. Variety in Training Formats

Provide a sample Training Plan that delivers adequate and thorough training of all DWD personnel including DWD systems support resources as well as all DWD Workforce professionals. This Plan must include:

F. A description of the types of training materials that will be developed for users who learn in a variety of formats

To complete the knowledge transfer to the State of Indiana, Geographic Solutions will supplement our training with standard (base) documentation, including user guides, manuals, and quick reference guides.

Geographic Solutions utilizes specialized documentation made for training purposes. These materials will be customized to accurately reflect approved DWD-specific system modifications as evidenced in the production environment. Geographic Solutions will ensure these materials are kept current as revisions/system upgrades occur throughout the life of the contract.

Geographic Solutions will develop all required training materials for presentation and delivery to training participants. The State will approve all training materials and curricula prior to distribution and training sessions. Geographic Solutions will present training materials electronically in a common format such as Microsoft Word or Portable Document Format (PDF).

[REDACTED]

- I [REDACTED]
- I [REDACTED]

[REDACTED]

[REDACTED]

Train the Trainer Considerations

[REDACTED]

Training Materials for Version Upgrades

[REDACTED]

[REDACTED]

G. DWD Support in Training Activities

Provide a sample Training Plan that delivers adequate and thorough training of all DWD personnel including DWD systems support resources as well as all DWD Workforce professionals. This Plan must include:

G. A list of the DWD resources needed to support in all training activities

To meet response requirements for this RFP, Geographic Solutions will complete **Attachment M – Procurement – RFP Resource Usage Template** to define the resources needed from DWD to support all training deliverables for the Case Management and Labor Exchange System Project.

Geographic Solutions’ recommended support model will enable DWD to pool resources and skills in many phases. The anticipated staff resource requirements for the DWD Project Team include the following roles for the implementation phases, as shown in the table below:

| Position | Role | Project Phases | Personnel Involved |
|--|--|--|--|
| Project Manager | Manages day to day running of the project | All phases | Usually one person |
| IT Leads | Provides direction and expertise on technical issues, including local network infrastructure, etc. | System design, development, testing and implementation and operation | Usually 1-2 staff members |
| Data Conversion Specialist | Provides assistance and expertise in the legacy systems data | System design, development, testing and implementation | Usually 1-2 staff members |
| Functional Subject Matter Experts | Special knowledge of specific areas of the system (e.g., Wagner-Peyser, WIOA, TAA, etc.) | System design, development, testing, training and implementation | Usually 4-10 staff members, depending on knowledge overlap |
| Key Stakeholders | Key individuals and management from business areas and partners with an interest in the system | System design, development, training and implementation | Usually 2-10, depending on management structure |

| Position | Role | Project Phases | Personnel Involved |
|---|---|---|---|
| User Acceptance Testing Team Members | Individuals designated to test and sign off on the system functionality | System testing, training and implementation | Usually 5-15 staff members |
| System Administrators | Individuals who will be responsible for configuring and administering the system | System testing, training and implementation | Varies, depending on level of regional control |
| Trainers | Individuals who will take part in train-the-trainer sessions and then train front line staff, if applicable | System testing, training and implementation | Varies, depending on staff requiring training and locations |

H. Maintenance and Updates of Training Materials

Provide a sample Training Plan that delivers adequate and thorough training of all DWD personnel including DWD systems support resources as well as all DWD Workforce professionals. This Plan must include:

H. A description of how training materials will be maintained/updated over the lifecycle of the system.

Besides creating the training materials for DWD approval, Geographic Solutions will update the materials we created when system changes make these materials obsolete.

In addition, our Technical Writing Team is dedicated to creating procedural user documentation for the *VOS Sapphire* system. Their goal is to enable end users to independently and successfully use the system with help from a variety of resources, including user guides, quick reference cards, online help, and the *Learning Center*.

Geographic Solutions continually revises our user documentation as appropriate throughout the life of the project and with subsequent system upgrades, as required.

External Training Plan

Provide a sample Training Plan that delivers adequate and thorough training of all non-DWD users of the system (e.g., job seekers and employers). This Plan must include:

- A. A timeline for all training activities*
- B. A list of all training materials that will be developed to support initial implementation*
- C. A description of the type of sessions that will be provided (e.g. in person, virtual)*
- D. Confirmation that training will be void of any personal identifying data*
- E. A description of the types of training materials that will be developed for users who learn in a variety of formats*
- F. A list of the DWD resources needed to support in all training activities*
- G. A description of how training materials will be maintained/updated over the lifecycle of the system.*

Geographic Solutions fully meets this requirement. Geographic Solutions will provide an updated sample Training Plan that delivers adequate and thorough training for all non-DWD users of the upgraded system (e.g., job seekers and employers). This Plan will include:

1. A timeline for all training activities.
2. A list of all training materials that will be developed to support initial implementation.
3. A description of the type of sessions that will be provided (e.g., in person, virtual).
4. Confirmation that training will be void of any personal identifying data.
5. A description of the types of training materials that will be developed for users who learn in a variety of formats.
6. A list of the DWD resources needed to support in all training activities.
7. A description of how training materials will be maintained/updated over the lifecycle of the system.

A. Training Timeline

Provide a sample Training Plan that delivers adequate and thorough training of all non-DWD users of the system (e.g., job seekers and employers). This Plan must include:

- A. A timeline for all training activities*

The final training plan submitted by Geographic Solutions will provide a timeline for all training activities for DWD users but will not include non-DWD users. The training resources we maintain for non-DWD users are updated in parallel with the annual upgrade we conduct for *VOS Sapphire*. This is a service we provide all our *VOS Sapphire* clients and are not necessarily specific to the Case Management and Labor Exchange System Project.

B. Training Materials to Support Implementation

Provide a sample Training Plan that delivers adequate and thorough training of all non-DWD users of the system (e.g., job seekers and employers). This Plan must include:

B. A list of all training materials that will be developed to support initial implementation

As part of the approved project plan, Geographic Solutions will maintain a list of all training materials for non-DWD users that will be provided to support initial implementation of the *VOS Sapphire 22* upgrade. [REDACTED]

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

[REDACTED]

C. Description of Training Sessions

Provide a sample Training Plan that delivers adequate and thorough training of all non-DWD users of the system (e.g., job seekers and employers). This Plan must include:

A. A timeline for all training activities

B. A list of all training materials that will be developed to support initial implementation

C. A description of the type of sessions that will be provided (e.g. in person, virtual)

[REDACTED]

D. Training Confidentiality

Provide a sample Training Plan that delivers adequate and thorough training of all non-DWD users of the system (e.g., job seekers and employers). This Plan must include:

D. Confirmation that training will be void of any personal identifying data

Geographic Solutions securely protects all customer data, so all training materials will be devoid of personally identifying information (PII) and will instead be constructed using pseudo data. As an example, individual and employer profile account information relies on pseudo Social Security numbers and Federal Employer ID numbers, sample address and contact information, and other non-production level data.

E. Variety in Training Formats

Provide a sample Training Plan that delivers adequate and thorough training of all non-DWD users of the system (e.g., job seekers and employers). This Plan must include:

E. A description of the types of training materials that will be developed for users who learn in a variety of formats

Geographic Solutions provides a variety of resources that provide training assistance and support for non-DWD end users. The following sections outline the resources in detail.

User Documentation

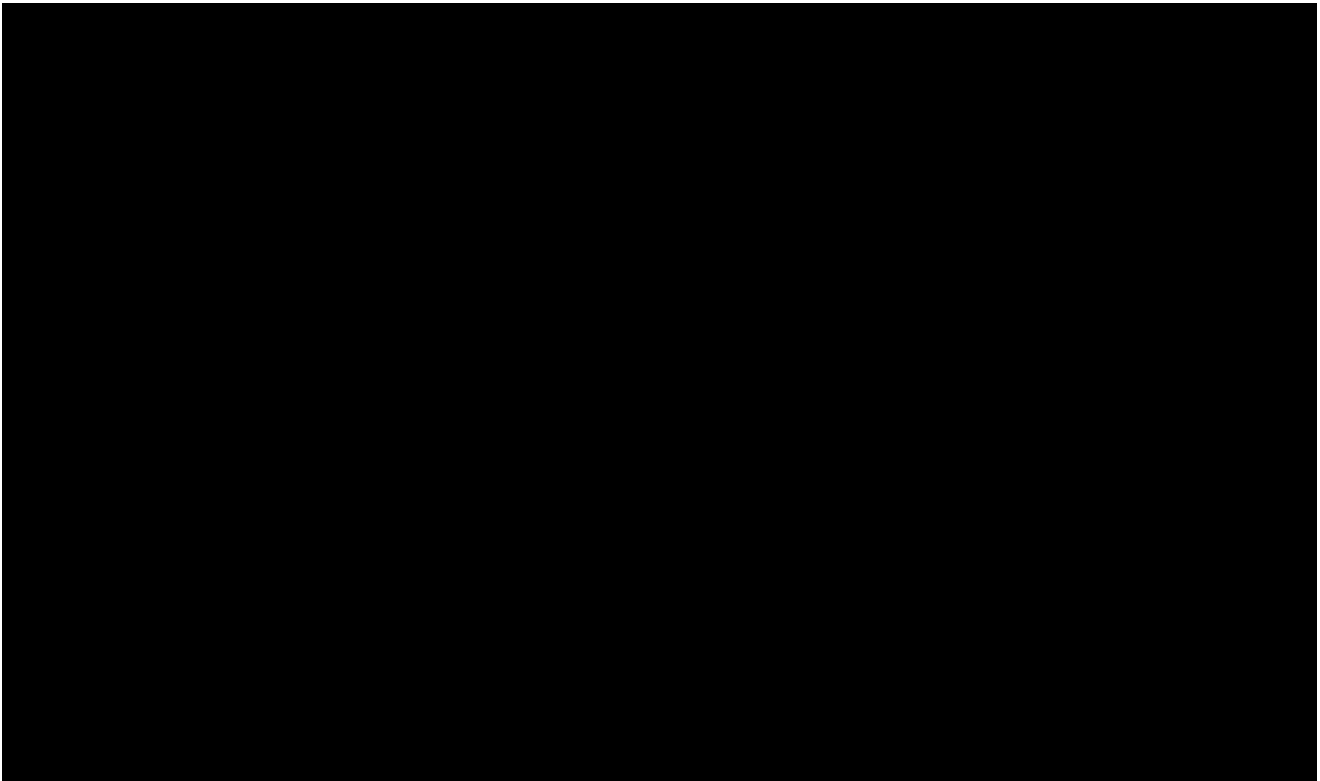
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

- [REDACTED]
 - [REDACTED]

Release Notes

[REDACTED]
 [REDACTED]
 [REDACTED]
 [REDACTED]

Quick Reference Cards



Online Help Functionality

[Redacted text block]

[Redacted text block]

Accessing Context-Sensitive Help

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[REDACTED]

[REDACTED]

[REDACTED]

F. DWD Support in Training Activities

Provide a sample Training Plan that delivers adequate and thorough training of all non-DWD users of the system (e.g., job seekers and employers). This Plan must include:

F. A list of the DWD resources needed to support in all training activities

At this time, Geographic Solutions' efforts to provide training and knowledge transfer support for non-DWD users do not require DWD resources. Our full Technical Writing Team is dedicated to creating procedural user documentation for the *VOS Sapphire* system. Their goal is to enable end users to independently and successfully use the system with help from a variety of [REDACTED]

G. Maintenance and Updates of Training Materials

Provide a sample Training Plan that delivers adequate and thorough training of all non-DWD users of the system (e.g., job seekers and employers). This Plan must include:

G. A description of how training materials will be maintained/updated over the lifecycle of the system.

For training materials and documentation for non-DWD users, Geographic Solutions revises these resources as appropriate throughout the life of the project and with subsequent system upgrades, as required.