

PROPOSAL FOR

(Topic Here—see example below)

HARASSMENT, DIVERSITY, AND RESPECTFUL WORKPLACE TRAINING

DATE

To: CLIENT NAME, COMPANY NAME, ADDRESS

THE COMPANY

YOUR COMPANY NAME is a professional skills training company that operates WHERE—IN US, SOUTHEAST US, NORTHEAST, ETC.. We are pleased to submit our proposal for TOPIC SEE EXAMPLE FOLLOWING harassment, diversity, and respectful workplace training for CLIENT NAME. As part of our proposed training package, YOUR COMPANY NAME offers three options and a combination option for training: instructor-led training, online training, interactive webinars, or a combination.

All Elevate USA training is interactive and feedback-based. All classroom-led training programs offered by Elevate USA are tailor-made to meet the needs of the client.

Incorporated in January 2010 as an independent woman-owned business, Elevate USA has been providing quality training since early 2007. Elevate USA has 27 current accounts, including federal, state, and local governments, civilian workforce training for Marine Corps bases, non-profits, and private industry.

Elevate USA offers expertise in designing online and on-site programs. We regularly field a diverse group of trainers, from all ethnicities and backgrounds, including entrepreneurs, veterans, and PhD recipients. All are experts in their field and have thousands of hours of training experience in which they use practical exercises to enhance theory, build confidence, and encourage participants to learn from mistakes in a simulated environment.

Some of our current clients include:

- **Department of Commerce** – agencies we train for include the Bureau of Economic Analysis (BEA), Bureau of Industry Securities (BIS), U.S. Census Bureau, National Institute of Standards and Technologies (NIST), National Telecommunications and Information Administration (NTIA)
- **State of Delaware** – we are a preferred vendor training all departments including Department of Transportation, Department of Labor, Department of Children and Families, Municipalities, and School Districts in over 150 topics
- **Commonwealth of Pennsylvania** – Pennsylvania Department of Transportation (PennDOT); we are an ITQ (Invitation to Qualify) vendor, approved to train for the following topics: Personnel, Organizational Development and Personnel, Communication, and Interpersonal Development,
- **State of Maryland Department of Rehabilitation Services**
- **City of New York, Department of Design and Construction**

- **Non-Profits** – World Wildlife Fund, Association of American Medical Colleges, and the National Association of Regulatory Commissions
- **Private Industry** – our biggest clients include Ocean Spray Cranberries and YellowBook

Elevate USA's lead trainer and President, Ellen Engel, was educated as a lawyer but is an entrepreneur at heart. She has started several successful businesses over a 40-year career, and has worked with government, non-profits, and private industry to build relationships and pro-active messages that underscore organizational goals. Capitalizing on entrepreneurial skills and a broad base of knowledge in the legal, management, and international business fields, Ellen has spent the last seven years sharing her knowledge with the public and private sectors. To Ellen, learning is a lifelong process. Her greatest passion is helping others achieve desired success and satisfaction from their careers.

Elevate USA is located in Philadelphia, PA. We have a satellite office in Pompano Beach, FL, and a staff of nine instructional designers, full-time trainers, and administrative assistants. We have a global reach and employ, on an independent contractor basis, a group of over 25 experienced trainers based around the world. All instructional designers and trainers are vetted by Ellen Engel, and are assigned jobs based on their expertise, experience, and client evaluation reports.

Elevate USA employs common-sense policies and procedures to ensure no person is ever excluded from training on the grounds of race, color, religion, national origin, gender, sexual orientation, age, disability, or medical condition.

THE PROPOSAL

Elevate USA Inc. proposes three options for AMCS PC Scale's continuing sexual harassment avoidance training.

- Classroom led training
- Online training
- Interactive webinar
- Combination training

The workplace of today is a complex arena that requires standards to not only govern the skills employed doing the job, but also to govern behavior. A workforce that understands the rules of etiquette, ethics, and respect is a better-oiled machine that can move ahead without friction, conflict, or unnecessary disagreements. It is essential that workforce behavior be carefully regulated but not dictated. Elevate USA's proposal for training in harassment, respectable workplace, diversity, and ethics in the workplace will ensure that executives, supervisors, and staff adhere to the same rules of respect, decency, and ethical behavior that allow all organizations to flourish without the worry of unacceptable behavior.

This proposal includes scope of services and fees. If you have any questions please contact Ellen Engel at Elevate USA Inc. The contact information can be found at the conclusion of this proposal.

SCOPE OF SERVICES

All classroom, webinar, and custom online training will be tailored to your needs, goals, and challenges. Off The Shelf online training is not customized. Training includes design, development, training facilitation, and training materials. Once the training is reserved, the

Elevate trainer and/or designer and your designated training representative will have a short 20-minute telephone call to further define learning objectives, goals, and challenges. The training will be developed based on the goals and objectives for training.

Option 1

Option 1 includes a full day of classroom training. Training will cover all three modules and will include lecture, experiential stories, interactive exercises, case studies, and a question and answer period. The full day of training can be divided into three modules and can be taught in two-hour increments.

Option 2

Option 2 is either customized online training or off the shelf online training. As companies become more globally focused, co-workers are more likely to work in different places. Online learning can help prepared employees to excel in today's scattered virtual office. After location, time is the greatest limitation on learning. That goes for both the instructors and the students, each of whom has to be both available and in alignment with the other for face-to-face instruction. By removing that requirement, everyone involved can participate at a time, and for a duration, that suits his or her schedule.

Elevate can design, develop, and fully customize your online training with a program that can be used for new employees and as a refresher for seasoned employees. The customized program can also be updated with new regulations and policies yearly for a period of five years.

We also offer general OTS (off the shelf) online programs.

For a preview of one of our past self-paced online learning resources, see:

http://zioninteractive.com/demo/Bullying%20on%20School%20Bus%20output/story_html5.html

Option 3

Elevate USA can prepare an interactive webinar for each training module. The webinar is broken into 10-15 minute increments of recorded lecture, then facilitated exercise and question and answers with a live trainer. The advantage of this webinar format is that the program is taped and can be reused in recorded format for new employees and as a refresher for seasoned employees.

Option 4

Option 4 includes a combination of classroom training and OTS online refresher training.

According to research recently published by KnowledgeAdvisors, 76% of learners apply 50% or less of what they learn. Coaching is increasingly being seen as a solution. A frequently cited research paper by Olivero, Bane & Kopelmann on the impact of coaching reported that training alone resulted in a 22.4% improvement in performance. However, when the training was supported by coaching the improvement in performance rose to 88%. Classroom training with follow-up online training is the best return on your investment.

SAMPLE MODULES

Based on the bullet points provided, we propose three modules for training: Harassment, Diversity, and Respectful Workplace. These can be delivered classroom style, online, or by interactive webinar. The sample agenda is a starting point from our OTS training. We can add and subtract topics based on your choice of training delivery and our tailoring call with you.

Module 1: **HARASSMENT**

Relationships at Work

- Toward client/customer
- Toward staff/employees
- Toward co-workers
- Toward supervisors/managers

Workplace Abuse

- Illegal
- Unethical
- Irresponsible act
- Examples of abuse
- Stealing
 - o Money
 - o Kickback
 - o Conflict of interest
 - o Time
- Vandalism
- Falsify records
- Break confidentiality
- Ignore safety rules
- Misrepresent
- Poor client service
- Irresponsible behavior
- Addictions
 - o Drugs
 - o Alcohol
 - o Tobacco
- Gossip
 - o Causes poor work environment (morale)
 - o Lowers productivity
- Harassment of coworkers
 - o Sexual
 - o Compliance as condition of employment
 - o Interferes with work performance through intimidation

Results of Workplace Abuse

- Unpleasant working conditions
- Cooperation failure

Response to Workplace Abuse

- Increase employee loyalty

- o Have employees take ownership
- Fair/consistent treatment
- Recognition of good work
- Sense of belonging
- More involvement
- Satisfying work
- Learning to listen
- Speak clearly and concisely

Module 2: **DIVERSITY**

- What is Diversity
- Facts and Figures: Diversity in the US and around the World
- Business Advantages of Diversity
- Perspectives Exercises—interactive exercises to illustrate a key point of view. This perspective exercise will be referred to throughout the training
- Your Government at Work
- Stereotypes Exercise
- From Stereotypes to Prejudices
- Conflict Resolution Part 1
- Intent vs. Impact
- Conflict Resolution Part 2
- Micro-messages: The Power of Small
- The Fine Line
- Cultural Differences
- Differences Examples
- Cultural Differences: Scenario
- World Perspectives Exercise
- Differences: Putting It All Together
- What Are My Employer's Policies
- Inclusion: Harnessing Diversity
- Inclusion and You
- “What Would You Do?” Scenarios
- Conclusion—final exercise reiterating how diversity represents a tremendous source of strength if we learn how to use our differences to our advantage

Module 3: **RESPECTABLE WORKPLACE**

- Identify Essential Communication Skills
- Fine-Tune Your Ear for Listening
- Tune Into Body Language
- Utilize Assertive Communication
- Identify and Build on Communication Behavior Style(s)
- Identify Your Personal Communication Style and Understand Others
- Understand Your Personal Style and the Styles of Those Around
- Strengths and Weaknesses of Behavior Styles
- Put Tact and Skill Techniques Into Action
- Get Along Better With That Difficult Person

- Take Advantage of Your Personal Strengths and Minimize Weaknesses
- Know When to Salvage a Relationship
- Prepare to React
- Identify Conflict Resolution Techniques
- Identify How You Can Influence Others and Maximize Results
- Understand Tact – Confronting Difficult People and Situations
- Put Diplomacy and Tact into Action — Apply Strategies to Real Life Experiences
- Transfer Learning to the Real World — Develop a Personal Action Plan

REPORTS & PROJECT CONTROL

Throughout the facilitation of the contract, Elevate USA account managers will maintain contact with the client. Elevate USA personnel will work with client staff to provide completed evaluations and submission of end-of-class survey results for each on-site program facilitated. Elevate USA trainers will keep track of participants using sign-in sheets/rosters, participant evaluation forms, and instructor self-evaluation forms. Copies (digital or physical) of the end-of-class surveys will be provided to the client no less than five days after each training session. Participants will be asked to fill out an evaluation form with regards to the trainer and the training content, following each session. Elevate USA trainers consistently score excellent evaluations from their students. All trainers score in the high 90% range. Evaluations are taken seriously and determine future changes in courses and trainer placement. An evaluation form will be provided to each participant at the training and collected at the end of the training session. The evaluation asks specific questions to evaluate the effectiveness of the course, the instructor, the learning objectives, and the knowledge/skill level of each participant before and after the training.

COURSE MATERIALS

Every training session comes with a full complement of reference materials participants can refer to during training and after the official classes have ended. We also provide all workbooks, multimedia tools, and other training materials. Elevate USA will provide training material samples no less than seven days before the first scheduled training session. Elevate USA trainers and instructional designers will accept changes requested by the client and shift our focus, as needed. All materials will be new and not photocopied at no additional cost to the client. These customized training materials will be provided for each participant at each training session facilitated.

At the conclusion of the training program, Elevate USA will provide participants with a certificate of completion. Each certificate will include name of the course, date of completion, name of participant and the name and seal of Elevate USA Inc. The client’s contracting officer or authorized representative will be given a copy of all completion certificates within seven business days of any on-site course completion.

PAST PERFORMANCE

1. Company Name

Contact Name

Title

Company

Address

Phone

Email

- **Service 1**
- **Service 2**
- **Etc...**

Start of Project: MM/DD/YYYY

End of Project: MM/DD/YYYY

Total Cost: \$0.00

Scope of Project

COMPANY NAME has was contracted to provide Service 1 & Service 2 for CLIENT NAME during a period of MM/DD/YYYY – MM/DD/YYYY. Describe your services and the client reaction. If possible, relate your past performance to the current objective of the RFP.

2. Company Name

Contact Name

Title

Company

Address

Phone

Email

- **Service 1**
- **Service 2**
- **Etc...**

Start of Project: MM/DD/YYYY

End of Project: MM/DD/YYYY

Total Cost: \$0.00

Scope of Project

COMPANY NAME has was contracted to provide Service 1 & Service 2 for CLIENT NAME during a period of MM/DD/YYYY – MM/DD/YYYY. Describe your services and the client reaction. If possible, relate your past performance to the current objective of the RFP.

KEY PERSONNEL

Describe your personnel, company structure, and how you chose each person for this proposal. Include a full or partial bio for each key member and emphasize what skills qualify them for participation in this response.

Elevate USA trainers use a combination of practical, interactive, and gamification training techniques to convey important lessons to a diverse audience. Our trainers consistently score above 90% on evaluation feedback from training participants and contracting officers. Trainers utilize critical thinking and participation to enhance theory, build confidence, and encourage participants to learn from mistakes in a simulated environment based on applicable real-world scenarios relevant to making information

easily absorbed by all training participants. They have trained government personnel, private employees, and non-profit volunteers within the United States and abroad.

Trainers will be chosen from the pool listed below, based on finalized training dates and trainer availability.

Trainers & Coaches



Carl Flowers: *Carl is a professional speaker, trainer, and expert in all manner of technical writing practices. He has trained across the public, private, and non-profit sectors (military installations, government agencies, oil and gas companies) and his engaging training expertise extends from technical writing to project management and beyond. Carl holds a degree in Speech & Mass Communication from the University of Illinois.*



Angela Massey: *Angela is professional speaker, trainer, and coach. She has amassed over 3,000 hours of technical writing training experience working with private industry (such as IBM and FedEx), high-profile law firms, and educational institutions (City University of New York and Yale University). She holds a doctorate degree from St. Luke Evangelical Seminary and an M.S. in Organizational Leadership from Amridge University.*

TRAINING FEES

Classroom-Led Training

Fees are all inclusive and cover the training preparation, a full-day of training, training materials (20 participants--\$3.50 per person above 20), and all travel expenses.

Training fees are for a full-day. If you choose to divide the program into module training, we can repeat the program morning and afternoon or we can facilitate one module in the morning and one module in the afternoon for a full-day of training so you get the best and highest use from your training dollar.

- Full-day classroom training at client location in the US \$2700
- Full-day classroom training at client location outside of the US \$3800
- Full-day remote classroom training (client provides platform for remote training) \$2500

Online Training

OTS Training

- \$3200 Harassment
- \$3700 Diversity
- \$4200 Respectable Workplace
- One year, one time fee \$500 for up to 200 employees for LMS access

All OTS training programs have reporting and tracking capabilities

Custom Online Training (all three modules)

- \$40000 if client provides best practices for their organization
- \$50000 if Elevate researches best practices for location and industry
- Includes free upgrades for five years (policies)
- Free LMS access, reporting, and tracking for up to 500 employees

Webinar

Cost Per Module (client provides platform for delivery)

\$4200

Cost Per Module (Elevate provides platform for delivery)

\$4300

Combination

15% discount on a combination of classroom led and online training

Elevate would like to become a trainer of choice for AMCS PC Scale. Our training is innovative, interactive, useful, practical, and entertaining. The stories and exercises we use in our training help to bring the lessons home so participants will remember and implement what they've learned. In addition, we always have a SME on hand to answer email questions from any of the participants.