

Training Proposal – Light Edit

My Role: Editor

Description: This is a segment of a letter proposal for development of a training program. The edit

- corrects capitalization, punctuation, and usage
- improves clarity
- increases the use of active voice
- improves the parallel structure of listed items

The document structure was deemed to be fine as it was. The edit was performed using Microsoft Word.

(Address and salutation removed)

This proposal responds to ABC Incorporated's request for training on its new records management policy.

Background

ABC Incorporated is instituting a new records management policy ~~that~~ pertains to records produced in all media. The policy covers records from creation or receipt through disposal. Corporate guidelines that define what a record is and how it ~~must~~ be handled have been established and now need to be communicated to employees so that ~~handling~~ records correctly becomes part of everyone's daily workflow.

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Approach

The content of the training can be viewed as a procedure. ~~Within the procedure, the employee must determine~~

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- what records are in ~~his or her~~ possession
- what ~~each~~ record ~~is~~ and who owns it
- why it is important to archive a record
- how ~~to~~ archive records
- how ~~to~~ review records once they are archived
- when and why ~~to~~ dispose of records

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Briefly stated, our approach will emphasize the importance of records management and the necessity of handling each record properly and professionally. ~~We will use case studies to simulate the job, asking learners to review the records in their possession, archive them, and review them once archived. We will also provide learners with a Frequently Asked Questions/Job Aid document, that learners can print and use for reference. A post-test will ensure that learners fully understand the records management policy and procedure.~~

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Treatment

Although this [training](#) may be a necessary business requirement, employees might consider it to be a tedious, boring task. The web training theme will be...

You may not find this topic exciting...

But it is important.

And, we will learn it and do it together...

We have considered two different treatments of the theme. Both are discussed below.

Treatment Choice A

The style, tone of voice, and caricature of the narrator will be modeled after the drill sergeant on the History Channel program, Mail Call. However, in the training, the language will be sensitized to a business environment. See the accompanying CD for a demonstration of the introduction.

Treatment Choice B

Will use the same theme but will use a less edgy treatment, personifying the competing motives of the packrat who wants to keep everything because one might need it someday and the [compulsively](#) neat person who throws things away as soon as the immediate need is past. Using cartoon characters [that](#) appear on the shoulders of our character, they [will](#) argue their points in a manner reminiscent of the devil and angel [in](#) many cartoons. The point here is that neither the packrat nor the compulsive neatnik is right all the time. The learner will become able to discriminate when to save a record, archive it, or dispose of it according to ABC Incorporated policy guidelines.

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Criteria for [Selecting a Treatment](#)

Since either treatment will work for the content, [it is important to](#) consider the target population and the corporate culture.

- Which treatment will be more engaging to the learners?
- Which will they want to return to, or [enthusiastically](#) share with others?
- Which is more supportive of the corporate culture?
- How can we improve [whichever](#) treatment [is selected](#)?

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Instructional Strategy

With either [of the treatments](#) presented above, we will integrate presentation of the records management policy into three case studies and test the learners' understanding by asking them to find records, review archived records, and dispose of records. While the graphical treatment of each case study will vary, the instructional treatment of a narrator presenting a situation and the learner performing a task will remain the same.

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Case Study 1 – Find Records

The graphical treatment in this case study will be an office in which the learner must find records. But before this task can be accomplished the learner will need to know what a record is, [determine](#) who owns it, and [understand](#) why it is important to archive the record. The practice will require [the learner](#) to discriminate [among](#) documents, emails, etc., which [are](#) records, and [similar items produced in](#) the same media, which [are not](#) records.

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Case Study 2 – Review Archived Records

In this case study the learner will use a simulated Lotus Notes database to find records, display them, and return them to the archive. We will assume that learners already know how to display and navigate through a typical Lotus Notes database. Scenarios used in this case study will concentrate of the characteristics of the database that are specific to finding records.

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Case Study 3 – Dispose of Records

In this case study, the learner will conduct a regular review of his or her records to identify those that should be disposed of and those with a Suspension hold.

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Assessment

The case studies described above will verify that the learner understands the ABC Incorporated records policy. Within the case studies, feedback for an incorrect answer will explain which guideline(s) should have been applied and what the correct answer should be. Feedback for a correct answer will reinforce the learner's choice by restating the appropriate guideline(s).

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FAQ/Job Aid

The Frequently Asked Questions/Job Aid document will answer the questions learners are most likely to ask plus provide a handy reference for each step in the records handling procedure. It will also refer learners to existing reference materials for additional information on specific topics. Learners can print the document for use during the training and then take it back to the job.

- Deleted: A jobaid based on frequently-asked questions will be created for the training. LINDA – ADD SOMETHING ABOUT HOW FAQS ARE PROBABLY THESE EASIEST WAY FOR THE LEARNER TO USE THE JOBAID AS REFERENCE FOLLOWING THE TRAINING. ¶

Post Test

The post test will include a series of questions (drag and drop, multiple-choice) that test the learner's understanding of the records policy as well as case studies that require learners to properly handle records. Here we want to know whether or not the learner can do the job, so the feedback will simply be 'correct' or 'incorrect.' Because the records policy is new to everyone, we are recommending only a post test.

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Assumptions

Our design, price, and development process are based on the following assumptions:

The entire course and the post test will be approximately thirty minutes long.

The content attached to the Request for Proposal is accurate and can be used for this course.

(Development process, pricing information, and signatures removed)