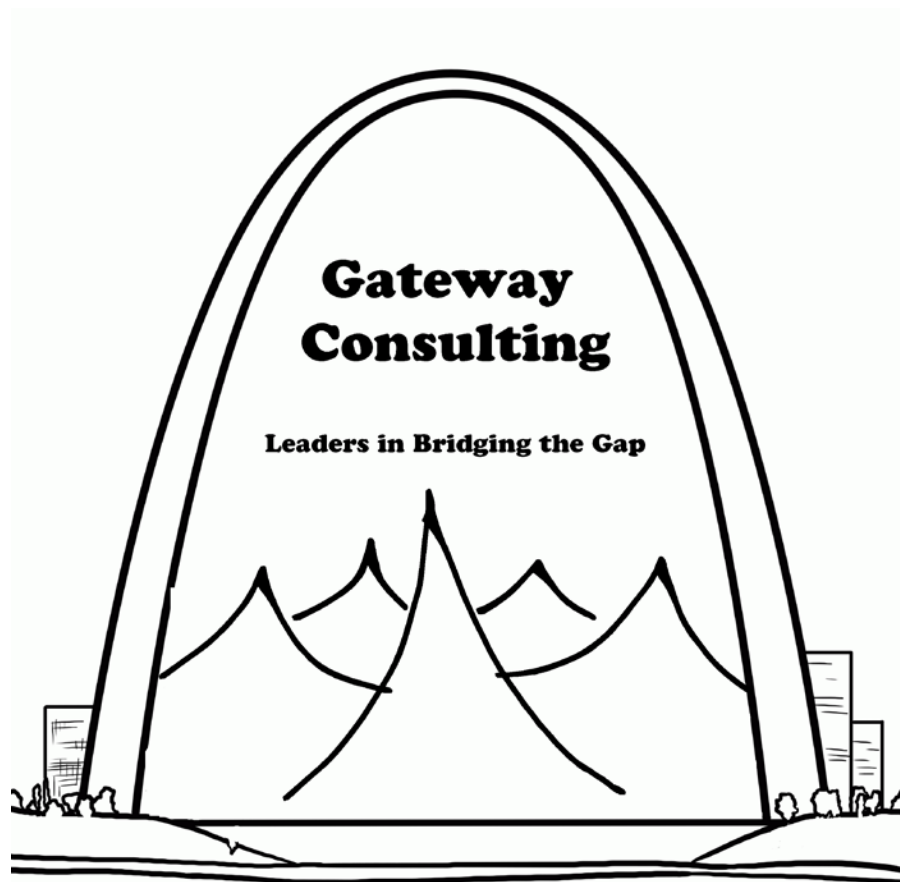


# *Gateway Consulting Response to the CLAO Request for Proposal*

## Legal eLearning Tools Pilot Program



July 25, 2013

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## Overview

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Gateway Consulting has over 12 years of combined experience producing online training solutions for a wide variety of clients. We are based in Colorado but have members in all areas of the world. This puts our company a step above the competition through experiences that allow for growth and learning creating the best outcomes for our clients. Our commitment to our clients is what drives our passion for success. We strive to bridge the gap between our client's vision and the actual outcome of the project so they are cohesive from start to finish.

Gateway Consulting is well-positioned to offer Colorado Legal Aid Online a superior technology based solution in its efforts to assist lower-income clients as they navigate the complex financial and judicial systems.

## Background

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Colorado Legal Aid Online (CLAO) is seeking a group to lead a development project for a series of web-based training courses for mortgage foreclosures and the associated legal issues. These courses will be used as a stand-alone product or in a blended learning environment for legal advocates. The legal advocates can also directly share some materials contained in the courses with the clients thus providing job aids and assistance materials based on the mortgage foreclosure process and legal issues.

In addition, CLAO has an abundance of source material from their four existing websites that can be harvested to help develop course material and has retained several subject matter experts (SMEs) that will be on hand to develop fresh content and ensure accuracy during course development.

## Objectives / Project Description

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Gateway Consulting will produce five online courses that will be integrated into Canvas LMS. Within the courses, legal aids will be able to move through the different stages of foreclosure and will witness real world scenarios as well as simulate real life situations. The engaging courses will be equipped with assignments, videos, quizzes, and other levels of interactivity.

## Project Scope

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**Time:** This project will take approximately 15 to 18 months to complete with all work delivered by January 31, 2015.

**Cost:** With a negotiable budget and pro-bono work, the overall cost will be minimal compared to the quality of the project.

**Quality:** The quality of time spent and the final product will be inherent of the dedication and commitment that the Gateway Consulting team will spend to ensure a high quality, effective outcome. Through our effective project management along with steady cooperation between the stakeholders, Gateway Consulting will produce a high-quality product. Our team is comprised of multiple skill sets to ensure a high-quality outcome.

## Deliverables

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By the end of this project, Gateway Consulting will deliver the following tangible products to CLAO.

1. A fully implemented Learning Management System
  - Gateway Consulting proposes that CLAO consider using Canvas by Instructure as the Learning Management System (LMS) for this project. Its cost structure, ease of use and customization, associated learning and collaborative tools, and mobile applications all make Canvas an ideal candidate for CLAO's objectives.
  - The largest benefit for using Canvas is by far the ease of use for students. Since CLAO's clients will be using the LMS for training, Canvas offers a user-friendly interface where students can navigate through their courses easily without getting lost. This is an ideal LMS since the clients will be taking the courses over a short period of time and will alleviate any frustration or insecurities of being in the correct course.
  - A short summary of Canvas's benefits over Moodle
    - Intuitive user interface
    - Multiple Mobile applications
    - Multiple browser and platform support
    - Open Source LMS
    - Integrated Video and Audio Messages and Discussion Posts
    - Integrated Web Conferencing (Feature can be appealing for future development)
    - Next Generation Cloud based system
    - Adjusts to work load put onto the system
2. Five courses aimed at legal aids integrated into the LMS
  - Preliminary consideration for Foreclosure, Loan Modification, or Short Sale in Colorado
    - In this module, learners will understand the differences of Foreclosure, Loan Modification, and Short Sale in order to help their clients decided which solution is best for them.
  - Beginning the foreclosure process - who what when and how
    - Clients will be guided through the mediation process of foreclosure including the many paths that can be taken for their client's very specific situation.
  - Experiencing foreclosure in the thick of it
    - This module will give clients the steps to help guide people through the foreclosure process.
  - Post-Foreclosure - your life and finances now
    - Clients will be able to create a toolbox that will help guide them when consulting with people to alleviate the uncertainty that comes with foreclosure.
  - Financial ramifications of foreclosure
    - Clients will be able to understand and identify the risks and ramifications that their clients will experience while going through the foreclosure process.

Each module will include these imperative deliverables in order to meet the needs of the clients.

- Case file examples
- Self-paced learning exercises including self-assessments
- Real world scenarios and simulations
- Online discussion groups with legal professionals
- Wikis for document sharing and collaboration
- Training webinars, web conferences, and other videos
- Robust options for feedback and evaluation
- Assignments
- Job aids that act as takeaways for future use with clients

3. A course of action to integrate existing website content including:
  - Webcasts
  - Online Discussion Groups
  - Automated Document Interviews

## Constraints

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Gateway Consulting understands that this project may not be the only active project being undertaken by both our team and the team at CLAO.

We expect to operate under the following project constraints:

- CLAO expects that the project will be delivered no later than January 31, 2015
- The project will incorporate a portion of pro bono services throughout the project
- All products completed as part of this project will be owned solely by CLAO and can be used at its discretion without further compensation to Gateway Consulting in the future
- Product is limited to English speaking learners
- Courses will be no more than 4 to 8 hours in length
- The product will be supported across multiple browsers and mobile devices
- Courses will meet CLAO prescribed disability standards
- There are three legal training directors and four foreclosure attorneys acting as Subject Matter Experts
- CLAO will dedicate one content manager for the project along with four other full time positions
- The project will comply with any compliance standards set forth by CLAO

## Stakeholders

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Gateway Consulting recognizes the following individuals and groups as stakeholders in the project.

- Gateway Consulting
- CLAO Kenny Hirschman (Project Sponsor)
- CLAO Board of Trustees
- State of Colorado Legal Services Board
- Colorado Bar Association Office of Professional Development

## Audience (Target Learner Profile)

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The target audience for the courses and the website are volunteers for Colorado legal aid organizations and include legal aids, attorneys, paralegals, and law students.

They typically possess the following traits:

- Computer Literacy: Most of the legal aids and attorneys have average computer skills.
- Age: 25-40 yrs
- Education Level: Bachelor's Degree to Graduate School (Law School)

## Business Value

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While there are many free resources for individuals going through foreclosure, there are a limited number of organizations taking the initiative to provide similar training and online resources for the legal aids those people turn to for advice.

Gateway Consulting will deliver an introductory group of courses along with a proven learning platform that will meet the needs of legal aids in order to educate the client and alleviate the pain and uncertainty that comes with foreclosure.

Not only will Gateway Consulting work with CLAO to create these courses, but Gateway Consulting will also be able to review quiz/assessment details of each course that will give insight to how the legal aids are retaining the information, and identify gaps in learning and in the material. The feedback surveys (a mid and final) will give overall course feedback that is not only related to the content, but also the overall course design.

## Project / Learning Objectives

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At Gateway Consulting, we pride ourselves on getting to the root of clients' needs and delivering on their objectives. To that end, we propose the following project objectives.

**Product Objective:** Gateway Consulting will select and implement an LMS that will train legal aids in the process of foreclosure for homeowners that cannot afford legal services. Initially, this LMS will deliver content on the different processes of foreclosure and will be available via mobile, tablet, and pc with the ability to add future content.

**Product Objective:** Gateway Consulting will produce five courses on foreclosure topics including, but not limited to the following:

- Preliminary consideration for Foreclosure, Mediation, Loan Modification, or Short Sale
- Beginning the foreclosure process - who what when & how
- Experiencing foreclosure in the thick of it
- Post-Foreclosure - your life and finances now
- Financial ramifications of foreclosure

### **Learning Objectives:**

Learners will be able to:

- Conduct a mock interview with a potential client
- Identify the different stages of foreclosure
- Create a toolbox for use when working with clients
- Assist clients in free legal help to find the best outcome for the client

## Resource Management

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Gateway Consulting has a wide range of professionals capable of meeting the needs of our clients. Here you will find details about the team we have selected to successfully lead your project.

## Personnel and Roles

### **Gateway Consulting**

Name	Background and Experience	Role	Responsibility	Costs per Hour
Jen Wilson	MA ILT, BS Communication, 8 years' experience consulting and training (software implementation)	Project Manager (GCPM), Instructional Designer (ID)	<ul style="list-style-type: none"> <li>○ Ensure consistent and clear communication among all stakeholders</li> <li>○ Plan schedule</li> <li>○ Manage resources and contain risks</li> <li>○ Achieve project goals on time</li> <li>○ Course Construction</li> </ul>	○ \$100
John Gagnepain	MA ILT, BA English, 17 years of training experience, 6 years' experience in eLearning software training	Senior Technical Designer (ST)	<ul style="list-style-type: none"> <li>○ LMS implementation and customization</li> <li>○ Ensure quality of course design</li> <li>○ Course Construction</li> </ul>	○ \$80
Sara Christensen	MA ILT, BA Education, 5 years of teaching and training experience	Instructional Designer, Media specialist (ID1)	<ul style="list-style-type: none"> <li>○ Work with SMEs to adapt</li> <li>○ Design and develop course content</li> <li>○ Course construction</li> <li>○ Create engaging aesthetic design</li> <li>○ maintain uniformity of design content</li> </ul>	○ \$70
Michael Kazanjian	MA ILT, PHD French, BA History, 5 years of teaching and training experience	Instructional Designer, Media specialist (ID2)	<ul style="list-style-type: none"> <li>○ Work with SMEs to adapt</li> <li>○ Design and develop course content</li> <li>○ Course construction</li> <li>○ Creation and Editing of video for courses</li> </ul>	○ \$70

\*\*Kenny Hirschmann from CLAO is referred to as PM representing CLAO's Project Manager within this proposal. He is listed in the Work Breakdown but there is no cost presently attributed to his role until proposal acceptance. \*\*

### **CLAO**

Gateway Consulting is looking forward to close collaboration with CLAO's eLearning Committee and Curriculum Committee. We will work closely together in order to ensure the highest level of quality content.

These committees will include the following:

- eLearning Committee : Three Legal Training Directors
- Curriculum Committee: Four Foreclosure Attorneys

We also look forward to working with a CLAO Legal Content Manager along with a Director of Technology, an Interactive Content Manager, an Outreach Coordinator, and a Multimedia Coordinator.

## Milestones

Below is the estimated time along with relevant milestones for the project.

Total Project: 15 months to final build, 18 months to final review.

Milestone	Date
<b>Initiation</b>	
Team Introductions and Initial Schedule	Aug 15, 2013
LMS Comparison	Aug 15, 2013
Finalize LMS Decision	Aug 19, 2013
<b>Strategy and Analysis</b>	
Identify Learning Outcomes	Aug 20, 2013
Presentation of Strategies and Options	Aug 23, 2013
Curriculum Design	Aug 27, 2013
Course Design	Aug 27, 2013
Course Template	Sep 7, 2013
Next Stage Schedule	Sep 10, 2013
<b>Design, Build, Train</b>	
LMS Adoption	Aug 27, 2013
LMS Customization	Sep 10, 2013
Course #1 Final	Nov 27, 2013
Course #2 Final	Feb 5, 2014
Course #3 Final	Apr 9, 2014
Course #4 Final	Jun 11, 2014
Course #5 Final	Aug 13, 2014
<b>Implementation</b>	
System Launch Date	Aug 18, 2014
Final Evaluation Review	Sep 15, 2014
End Project Report	Sep 29, 2014

## Work Breakdown Structure and Costs

Below you will find a breakdown of all tasks and costs as part of this project.

Initiation	Start Date	End Date	Approval	Resources	# of Hours	Total Cost
<b>Team Intros</b>	8/15/13	8/15/13		Gateway Consulting and CLAO committees	2	Pro Bono
<b>Project Plan</b>	8/15/13	8/15/13		Project Manager (GCPM)	4	400
Outline project plan				GCPM	x	
Establish paths of communication				GCPM	x	
Review feasibility and Business Case				GCPM	x	
Identify quality & acceptance criteria				GCPM	x	
<b>Presentation: LMS Comparison</b>	8/15/13			Senior Tech Designer	1	80
<b>Finalize LMS Decision</b>	8/19/13			ST, GCPM & PM	0.5	90



Initiation (cont)	Start Date	End Date	Approval	Resources	# of Hours	Total Cost
<b>Project Initiation Document and Signoff</b>	8/19/13		Required	GCPM & PM	0.5	Pro Bono

Strategy and Analysis	Start Date	End Date	Approval	Resources	# of Hours	Total Cost
<b>Identify Learning Objectives</b>	8/19/13			ID 1, ID 2	5	700
<b>Identify Assessment Needs</b>	8/20/13			ID 1, ID 2	10	1400
<b>Identify Content (existing &amp; needed)</b>	8/23/13			ID 1, ID 2 + SMEs	4	560
<b>Presentation of Strategies &amp; Options</b>	8/23/13			ID 1, ID 2	2	280
<b>Confirmation of Strategies</b>	8/26/13			ID 1, ID 2	2	280
<b>Curriculum Design</b>	8/27/13	9/7/13		ID 1, ID 2	40	5600
<b>Course Designs</b>	8/27/13	9/7/13		ID 1, ID 2	40	5600
Establish learning objectives				ID 1, ID 2	x	
<b>Course Template</b>	9/3/13	9/7/13		ID 1, ID 2	40	5600
<b>Presentation and Confirmation of Designs</b>	9/9/13		Required	GCPM	2	200
<b>Next Phase Schedule</b>	9/10/13			GCPM	3	300

Design, Build and Train	Start Date	End Date	Approval	Resources	# of Hours	Total Cost
<b>Adopt LMS</b>	8/27/13	9/3/13		ST	30	2400
Back-end server implementation				ST	x	
User profile setup				ST	x	
LMS training session	9/4/13	9/5/13		ST	12	960
<b>LMS Customization</b>	9/10/13	9/20/13		ST	35	2800
Build course template shell				ST	x	
Learning tools setup				ST	x	
LMS training session	9/23/13	9/24/13		ST	12	Pro Bono
<b>Course #1</b>	9/25/13	11/1/13			150	21000
Syllabus				ID 1, ID 2	20	
Gather course materials				ID 1, ID 2	5	
Create course content				ID 1, ID 2	90	
Build course prototype				ID 1, ID 2	20	
LMS training session				ID 1, ID 2	5	
Test prototype				ID 1, ID 2	10	
<b>Course #1 Review</b>	11/4/13	11/22/13		GC & CLAO	90	28800

Design, Build and Train (cont)	Start Date	End Date	Approval	Resources	# of Hours	Total Cost
Evaluate results				ID 1, ID 2	10	
Revise and rebuild				ID 1, ID 2	70	
Retest				ID 1, ID 2	10	
<b>Course #1 Formal Presentation</b>	11/27/13			GCPM & PM	1	Pro Bono
<b>Course #1 Sign-off</b>	11/27/13		Required	GCPM & PM	4	400
<b>Course #2</b>	11/28/13	1/10/14			150	21000
Syllabus				ID 1, ID 2	20	
Gather course materials				ID 1, ID 2	5	
Create course content				ID 1, ID 2	90	
Build course prototype				ID 1, ID 2	20	
LMS training session				ID 1, ID 2	5	
Test prototype				ID 1, ID 2	10	
<b>Course #2 Review</b>	1/13/14	1/31/14		GC & CLAO	90	28800
Evaluate results				ID 1, ID 2	10	
Revise and rebuild				ID 1, ID 2	70	
Retest				ID 1, ID 2	10	
<b>Course #2 Formal Presentation</b>	2/5/14			GCPM & PM	1	Pro Bono
<b>Course #2 Sign-off</b>	2/5/14		Required	GCPM & PM	4	400
<b>Course #3</b>	2/6/14	3/14/14			150	21000
Syllabus				ID 1, ID 2	20	
Gather course materials				ID 1, ID 2	5	
Create course content				ID 1, ID 2	90	
Build course prototype				ID 1, ID 2	20	
LMS training session				ID 1, ID 2	5	
Test prototype				ID 1, ID 2	10	
<b>Course #3 Review</b>	3/17/14	4/4/14		GC & CLAO	90	28800
Evaluate results				ID 1, ID 2	10	
Revise and rebuild				ID 1, ID 2	70	
Retest				ID 1, ID 2	10	
<b>Course #3 Formal Presentation</b>	4/9/14			GCPM & PM	1	Pro Bono
<b>Course #3 Sign-off</b>	4/9/14		Required	GCPM & PM	4	400
<b>Course #4</b>	4/10/14	5/16/14			150	21000
Syllabus				ID 1, ID 2	20	
Gather course materials				ID 1, ID 2	5	

Design, Build and Train (cont)	Start Date	End Date	Approval	Resources	# of Hours	Total Cost
Create course content				ID 1, ID 2	90	
Build course prototype				ID 1, ID 2	20	
LMS training session				ID 1, ID 2	5	
Test prototype				ID 1, ID 2	10	
<b>Course #4 Review</b>	5/19/14	6/6/14		GC & CLAO	90	28800
Evaluate results				ID 1, ID 2	10	
Revise and rebuild				ID 1, ID 2	70	
Retest				ID 1, ID 2	10	
<b>Course #4 Formal Presentation</b>	6/11/14			GCPM & PM	1	Pro Bono
<b>Course #4 Sign-off</b>	6/11/14		Required	GCPM & PM	4	400
<b>Course #5</b>	6/12/14	7/18/14			150	21000
Syllabus				ID 1, ID 2	20	
Gather course materials				ID 1, ID 2	5	
Create course content				ID 1, ID 2	90	
Build course prototype				ID 1, ID 2	20	
LMS training session				ID 1, ID 2	5	
Test prototype				ID 1, ID 2	10	
<b>Course #5 Review</b>	7/21/14	8/8/14		GC & CLAO	90	28800
Evaluate results				ID 1, ID 2	10	
Revise and rebuild				ID 1, ID 2	70	
Retest				ID 1, ID 2	10	
<b>Course #5 Formal Presentation</b>	8/13/13			GCPM & PM	1	Pro Bono
<b>Course #5 Sign-off</b>	8/13/13		Required	GCPM & PM	4	400

Implementation	Start Date	End Date	Approval	Resources	# of Hours	Total Cost
<b>LMS Course Launch Date</b>	8/18/14			GCPM, ST & PM	5	Pro Bono
<b>Handover LMS Administration</b>	8/18/14			ST & PM	2	160
<b>Webhosting for First Year of Launch</b>	8/18/14			ST & PM	n/a	Pro Bono
<b>Review of Analytics and Feedback</b>	9/1/14			GC & CLAO	4	1280
Aiding with changes				ST, ID 1, ID 2	15	Pro Bono
<b>Final Evaluation Review</b>	9/15/14			GCPM, ST & PM	4	720
<b>End Project Report</b>	9/29/14			GCPM & PM	4	400
<b>Total Cost</b>						<b>280,810</b>

N.B. Final Evaluation Review will be Pro Bono for time over 4 hours

## Pro Bono Work

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Gateway Consultants understands that costs can sometimes deter not-for profit organizations from mounting larger scale projects. While the costs of labor are included in our analysis, CLAO will not incur certain costs normally associated with a project of this nature.

As part of the plan, Gateway Consulting will provide free web hosting for the project for the first year of use not including the test phases of the project.

In addition, we will host training seminars for your staff to teach them how to use the new LMS as well as answer frequently asked questions that may be posed towards them by learners.

Finally, we will assist in the online marketing of the project after launch by announcing it to our client base as well as announcements through other communications avenues.

## Payment Schedule

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Gateway Consultants utilizes a variety of payment methods and schedules to best help our clients meet their financial obligations while ensuring we have the resources necessary to continue the project.

Once an initial retainer fee is agreed upon, we will only bill CLAO as set milestones are met throughout the lifespan of the project. See the chart below for our anticipated payment schedule.

Project Deliverable	Payment Amount	Payment Due
<b>Implementation of the LMS</b>	20% of remaining balance	30 days after delivery
<b>Course #1</b>	16% of remaining balance	30 days after delivery
<b>Course #2</b>	16% of remaining balance	30 days after delivery
<b>Course #3</b>	16% of remaining balance	30 days after delivery
<b>Course #4</b>	16% of remaining balance	30 days after delivery
<b>Course #5</b>	16% of remaining balance	30 days after delivery

Failure to make payments within 15 days of due date will result in an emergency meeting between GTPM and PM, and possible revisions of the timeline.

## Project Communication

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Gateway Consulting has experience with several methods of communicating the status of our projects with clients. We will work with CLAO to ensure that all stakeholders are coordinating with us throughout each step of the project.

### General Communications

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**Gateway Consulting:** Gateway Consulting team will communicate with each other multiple times per week. We will stay in contact via email and phone conversations. Our team will be responsible for checking in with other managers, directors, and coordinators regularly on the project's milestones.

**CLAO:** We anticipate that Mr. Hirschmann will communicate with his staff through CLAO's normal protocols to establish that the work is on track and there are no misunderstandings. He will then report to the Gateway team any and all concerns or questions.

**Subject Matter Experts:** The SMEs will communicate regularly via email, face to face, and by phone to the Project Director and Gateway Consulting.

The following table establishes the type, frequency, and participants of the communication plan.

Type	Frequency	Participants	Method
<b>Progress Review</b>	Every two weeks	Gateway team	Phone
<b>Status Reports</b>	Every month	Formal and informal reports by GCPM to PM	Teleconf.
<b>Stage Reports</b>	At stage ends	Formal report by GCPM to PM	In Person
<b>Design Collaboration</b>	Weekly (constant feedback); flexible depending on work	Gateway team and SMEs	Teleconf.
<b>Content Collaboration</b>	Weekly (constant feedback), flexible depending on work	Gateway team and SMEs	Teleconf.
<b>Prototype Testing</b>	Two week period involving real-time feedback	Gateway team and SMEs	Teleconf.
<b>Full Testing</b>	Four week period involving real-time feedback	Gateway team and SMEs	Teleconf.
<b>Formal Presentation</b>	At end of course builds	GCPM and PM	Teleconf.

N.B. Teleconferences are handled per client’s request (Skype, Google+, GoToMeeting, etc...)

#### Reports: Status and Stage

Formal reports will occur both in writing and live (phone, conference call). The Gateway PM will make a formal presentation to the CLAO PM in a meeting designed to be completed efficiently, taking no longer than 1 hour.

If issues do arise, the first recourse of problem solving will be through Mr. Hirschmann. The formal presentation will include the following items:

- Recap of progress to date outlining timeline, budget, obstacles encountered and overcome
- Current progress report outlining timeline and budget
- Project projection including highlights of anticipated hurdles and milestones

## Change Mitigation

Gateway Consulting understands that there will likely be opportunities for change once the project has begun. To that end, the following guidelines and change process will be initiated.

### Change Guidelines

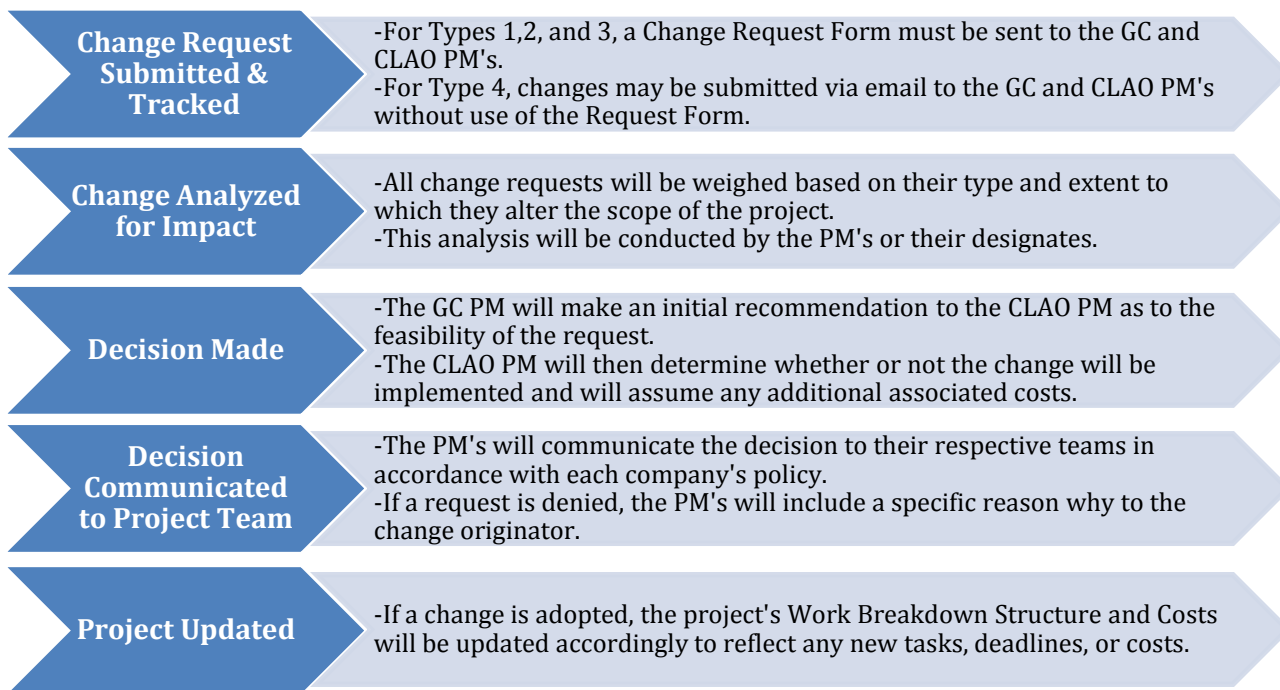
Gateway Consulting divides change requests into four categories:

Request ID	Request Type	Description
<b>Type 1</b>	Critical	A Critical request is considered vital to the project's success and must be addressed immediately.
<b>Type 2</b>	Significant	A Significant request is one that may either fundamentally alter the project scope (different direction than initially agreed upon), or substantially affect the timeline or budget.
<b>Type 3</b>	Secondary	A Secondary request is one that does not necessitate substantial changes to either the timeline or the budget. These changes may require an extra hour or less of resource time.
<b>Type 4</b>	Low Impact	Low Impact requests are those will be addressed only if time and budget permits them.

All change requests will be individually numbered and tracked throughout the project's lifetime in the Project Changes Log. The Gateway Consulting Project Manager keeps this log, but a copy can be made available to all stakeholders upon request.

### Change Process

Once a potential change has been identified, Gateway Consulting and CLAO agree to follow this process.



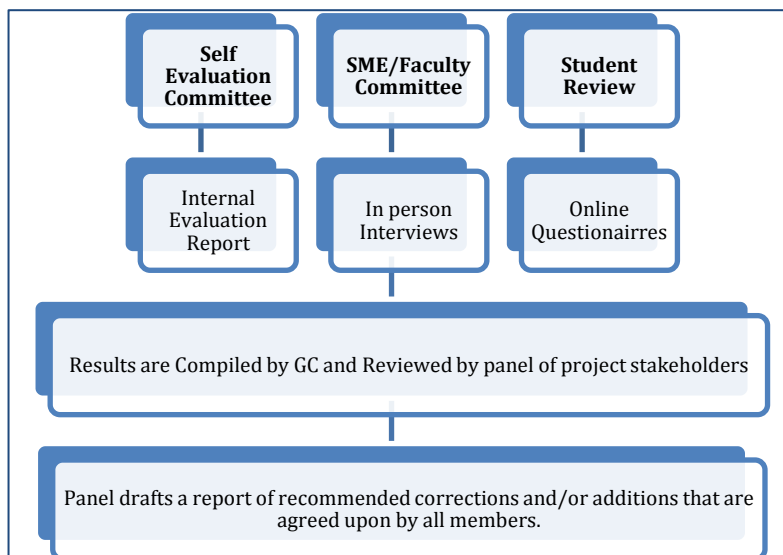
## Quality Assurance

Gateway Consulting aspires to provide the highest level of quality in our products. We will work in partnership with CLAO to ensure that the standards of both organizations are met beyond a satisfactory level.

To that end, we will institute the following program standards and evaluation process for both the LMS and the courses.

### Course Evaluation Process Pre-Deployment

Prior to the release of every course, Gateway Consulting will initiate a three tiered evaluation process that ensures that all necessary stakeholders are involved in the evaluation process.



#### Self-Evaluation Committee:

Gateway Consulting Quality Assurance Team

#### SME/Faculty Committee:

CLAO eLearning and Curriculum committees

**Student Review:** CLAO identified potential students of the material

### Revisions

We estimate there will be a minimum of three rounds of revisions received.

Revision	Typical Time Frame
<b>Round 1</b>	3-4 weeks
<b>Round 2</b>	2-3 weeks
<b>Round 3</b>	1-2 weeks

### Standards of Quality

As this project has two distinct parts, each will be judged accordingly.

**LMS** – Regardless of which LMS is ultimately decided upon, its implementation must provide the following:

- Functionality 1: LMS must work in the technical sense
- Functionality 2: LMS should be easy to use and easy to navigate
- Accessibility: LMS must be available on desktop, tablet, phone, or other mobile devices

**Courses** – The five courses should be esthetically pleasing, engaging, fun and effective. These subjective criteria lead to, and are of equal importance to, criteria included in the following learning objectives:

- Conduct a mock interview with a potential client
- Identify the different stages of foreclosure
- Create a toolbox for use when working with clients
- Assist clients in free legal help to find the best outcome for the client

The section below contains more detailed criteria.

### Evaluation Criteria

We recommend utilizing the following criteria when evaluating course content.

Measurable Quality	Level of Quality Comments	Measurement
Learning objectives are clearly defined		1 2 3 4 5 6 7 8 9 10
Design document followed		1 2 3 4 5 6 7 8 9 10
Users are able to complete, understand and educate others based on course content		1 2 3 4 5 6 7 8 9 10
Content is well organized		1 2 3 4 5 6 7 8 9 10
Appropriate level of content within each class		1 2 3 4 5 6 7 8 9 10
Use of interactive methods and simulations		1 2 3 4 5 6 7 8 9 10
Opportunities for individualized learning		1 2 3 4 5 6 7 8 9 10
Appropriate background information given		1 2 3 4 5 6 7 8 9 10
Intuitive and logical navigation		1 2 3 4 5 6 7 8 9 10
Inclusion of links to supplemental resources		1 2 3 4 5 6 7 8 9 10
Self-assessment and/or evaluation for the learner		1 2 3 4 5 6 7 8 9 10
Feedback/Suggestion section		1 2 3 4 5 6 7 8 9 10

### Implementation and Testing Procedures

Gateway Consulting has established a rigorous evaluation criteria as well as a series of testing and sign-off procedures throughout the project. This gives CLAO and Gateway Consulting an opportunity to keep on top of the project and its development throughout the entire process. Each course has built in a period of review, revision, and retesting as evaluated in the Work Breakdown Structure listed above. This gives ample opportunity for changes and a top-notch quality product for our clients. Furthermore, even after the project is in its final evaluation we have built in a period of revision as illustrated above to be used by CLAO to achieve the product they desire.

### Overall Project Evaluation

Following the release of the LMS and associated content, CLAO will have the opportunity to rate the work of Gateway Consulting in the following areas and supply any additional comments on our work.

Topics		
Schedule Followed	Schedule Adjusted based on need	Courses designed as expected
Research and/or Interviews Conducted	Research and/or Interviews incorporated	Level of Engagement of Course Material
Budget Followed	Progress Updates Issued Regularly	Course Navigation is Easy to Follow
Budget Adjusted in Excess	Level of Vendor Involvement	Staffing Roles Defined and Followed
Budget Adjusted Under Proposal	Level of Staff Involvement	Level of Project Communication
Objectives Clearly Defined	Level of PM Involvement	Level of Topics included in Course
Objectives Followed	Understanding Course Material	Technology Utilized Effectively



## Measurement/Estimation of Return on Investment (ROI)

Gateway Consulting will use the Success Case Method for evaluation of the project and final outcome and provide two different surveys at the end of one year of implementation.

The first survey will go out to all the legal aids to give CLAO a general idea of how well the training courses are being utilized and how effective they are for public clients.

The second survey will be addressed to the public clients that will inform CLAO of the general success rate of the legal aids.

Because CLAO is a non-profit organization, the success of the training courses is determined by the success of the legal aids and their ability to be most effective with their public clients. If the public clients respond with positive feedback from their experience with the trained legal aids, then the program is a success.

## Risk Management and Mitigation Plan

With projects of this scope, we understand that there are risks involved that can affect the process and the objectives. Gateway Consulting has established the following risks and appropriate counter measures to mitigate any potential delays or disruptions.

ID	Risk Type	Description	Probability	Impact	Counter Measures
1	Schedule	Project timeline cut short or limited	Low	High	Weekly status updates to project parties via communication chart.
2	Technology	Technology / Equipment malfunction	Low	High	The Canvas LMS is hosted by Instructure and sends notifications for scheduled maintenance. They have redundancy in their servers and the course will be available when needed by the users.
3	Staff	Communication breakdown	Low	Med	Project staff will communicate via email prior to each milestone. If milestones or tasks are failing then more regular updates between parties will be established.
4	Staff	SME / Resource scheduling conflicts	Med	Med	Project has multiple SME's devoted to the project. The only true limitation will be scheduling between the program coordinators and SME's.
5	Resource	Insufficient information on a topic	Low	Low	CLAO has 3000+ pieces of pre-constructed content, several SME's and additional resources being devoted to this project. Again, scheduling and acquisition of content will be the potential issues.
6	Staff	Sponsor/Client does not approve milestone	Low	High	Weekly communication updates on project will help alleviate this as the Sponsor / Client should be regularly updated on where we are in the project and if they have reservations.

ID	Risk Type	Description	Probability	Impact	Counter Measures
7	Resource	Learning needs not met	Low	High	Scope of project from the beginning has been limited to focus on foreclosure education. Structure and content needs to meet these requirements.
8	Budget	Allotted time/cost budget exceeded	Low	Med	Estimated work hours/costs may potentially exceed estimated budget. This project has a large budget but it is a good idea to keep it in mind, as there are time restrictions on the project.
9	Resource	Legal Aids low acceptance and adoption of the new foreclosure training	Med	High	CLAO needs to be proactive in promoting the courses and encouraging their Legal Aids to use the resources provided. Previously these resources were spread-out over four websites or not consolidated to these topics.
10	Staff	Lack of clarity in the level of the courses being developed	Low	High	The project plan and learning objectives should clarify all courses being developed for the project. If there is a communication breakdown due to a lack of clarity, it should be addressed early in the project or in the proposal stages. As each stage has multiple redundancies and signoffs this should be addressed early in each stage and prior to final revisions.
11	Staff	Ability to achieve total and complete organizational support to ensure success	Low	High	Project buy-in by the CLAO is essential in not only project completion but usability. Regular communication between project and CLAO staff should address any issues and provide regular updates for project support and success.
12	Staff	Project Staff is sick or indisposed	Low	Low	Multiple members of each group (CLAO and Gateway Consulting) are involved with the project, limiting the impact of key individuals being sick or unavailable at any given time.
13	Staff	Project Staff member leaves team	Low	Med	Our team has an established track record together, but in the event someone does leave the team, we have numerous free-lance contacts with whom we have worked with before who are always more than willing to step in.
14	Schedule	Certain stages of the timeline take longer than expected	Med	High	GC has compensated for these overages with a 3-month float period that allows room for flexibility.

## Conclusion

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Gateway Consulting is pleased to offer this proposal to Colorado Legal Aid Online. We believe that this proposal will help your organization surpass the objectives of delivering free online courses to legal aids throughout the state by utilizing a proven learning platform.

We look forward to presenting this plan to you, and we are confident we will be able to answer your questions to a satisfactory level.

We hope that our passion for providing online learning solutions along with our commitment to quality will result a valuable collaboration benefiting both of our organizations as well as the thousands of future learners this project will educate.

## Final Product Approval and Acceptance

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The following signatures between Colorado Legal Aid Online and Gateway consulting consent an understanding of agreement to the above terms and conditions for the project described above. This commitment to the final acceptance of the above-proposed project between Colorado Legal Aid Online and Gateway Consulting solidifies their mutual relationship to produce five online courses as described in the Objectives / Project Description on page 3.

Moreover, the commitment between Colorado Legal Aid Online and Gateway Consulting is a mutually beneficial relationship that ensures that the project plan outlines expectations, deliverables and desired outcomes of both parties.

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Kenny Hirschmann                      Date  
Colorado Legal Aid Online Project Sponsor

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Jen Wilson                                      Date  
Gateway Consulting PM

Comments:

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