Needs Analysis

PROJECT OVERVIEW

Client:

Hunter Dendy, Eco-Sense

Date of Meeting:

4/14/2023

Project Topic/Title:

Eco-Sense Training Presentation on Energy Star v 3.1
- This will be an ILT presentation with the effectiveness determined by the performance outcome.

What do you see as the problem you are hoping to solve with this training?

The client has noticed that homes that his builder clients have built to pass the Energy Star v 3.0 standards are not all passing the new, more stringent standards (Energy Star v. 3.1).

What are the goals of this training/course?

The client would like to provide training to builders so that more homes can pass the Energy Star v 3.1 inspections.

Objectives:
- Builders will:
  - Understand the key differences between v3.0 and v3.1
  - Understand the key areas where homes are having trouble passing v3.1
  - Gain new strategies to ensure homes meet the new, more stringent v3.1 standards
  - Return to a success rate of 90%+ homes passing Energy Star inspections

How will the learner benefit from this training/course?

The learner will benefit by gaining new strategies for getting homes to pass the Energy Star v3.1 inspections, resulting in higher pass rates for the homes they are building.

How will the organization/company benefit from this training/course?

Eco-Sense will benefit in the long run b/c if builders cannot get their homes to pass the inspections then they may stop contracting Eco-Sense to do the inspections. If builders can pass inspections, they will continue to do business with Eco-Sense.

Who are the learners?

The learners are builders and contractors.

What should the learners be able to do following this training?

The learners should be aware of the changes to the Energy Star rating system and should be able to use the recommended strategies when building homes so that the homes will pass the inspections.

How will you know if the goals and learning objectives have been achieved?

If builders apply the strategies, the inspection pass rate for their homes should increase.

Will there be an end-of-course assessment? If so, what MUST they be tested on?

The client does not want a formal assessment.

Will you be providing any resources for content? Textbooks, old course content, etc.?

A basic slide presentation will be provided by the client. The Energy Star v3.1 webinar presentation can be referenced - available online on the EPA website.

Who are the SMEs for this training/course and how can they be contacted?

Client/Hunter Dendy

Are there any preferences for how this content is delivered? (eLearning Course, ILT, VILT, Instructional Video, etc.)

The client will deliver the training in person. He may also use the presentation to record an asynchronous VILT in the future.

What technology or equipment will be needed to deliver this training/course?

The slide presentation should be created in Google Slides or PowerPoint. The client will need to be able to project the presentation on-site.

Are job aids, trainer guides, or participant guides desired?

The client would like a job aid/quick reference tool. Trainer guides and participant guides are not desired.

Are any specific types of interactives or learner participation desired?

No. The client does not wish to include interactive learning in this training.

Is there anything else that you'd like me to know about this project or anything that should be included that we haven't discussed?

The client states he has permission to use Energy Star images (included in the basic slide deck provided by the client) as an accredited Energy Star Home Rater.

The client may wish to update the presentation in the future if subsequent updates are made to the Energy Star rating system.

Due date for final deliverables (completed course files, training presentation, etc.):

Client needs to receive completed presentation by 5/26/2023

Additional Notes:

NEXT STEPS

Recommendations (To be shared with client via email after Needs Assessment Meeting):

Option 1:
- ILT Slide Presentation:
    - Create simple and modern template design using branding/colors from website
    - Modify content from client provided presentation to support learner engagement and retention of information
    - Include text and image animation
    - Add icons where applicable
    - Recreate tables to fit branding colors

- Job Aid:
    - Create pdf Job Aid for Compliance Strategies that builders can access on their phones as a reference tool

Option 2:
- ILT Slide Presentation:
    - Includes all Option 1 features, plus:
        - Add gamified learning checkpoints to keep learners engaged during the training (Kahoot)
- Job Aid:
    - Same as Option 1
- Instructional Video:
    - Create and instructional video using the slide deck. This could be shared with new builders/customers to streamline the training process and ensure a high success rate from the beginning when working with new builder clients.
        - Write a script/narration for the video - This will require more detailed input from the client/SME.
        - Final deadline will need to be pushed out by 2 weeks.

Timeline:

Option 1 Timeline:
- Friday, 4/21/23 - Meeting
  - Client will decide on Option 1 or Option 2
  - ID will present 2 slide deck template options
- Friday, 4/28/23 - 1st Review
  - ID will share presentation draft via email
- Wednesday, 5/3/23 - Feedback Due
  - Client will submit feedback to ID via comments within slide deck
- Friday, 5/5/23 - 2nd Review
  - ID will share revised presentation via email
- Wednesday, 5/10/23 - Feedback Due
  - Client will submit feedback to ID via comments within slide deck
- Friday, 5/12/23 - Meeting
  - Review revised presentation and discuss any final changes
  - Client to sign off on finalized presentation
  - ID will present Job Aid design/mock-up
- Friday, 5/19/23 - Final Review - Job Aid
  - ID will share Job Aid draft via email
- Wednesday, 5/24/23 - Feedback Due
  - Client will submit feedback to ID via comments within the Job Aid document
- Friday, 5/26/23 - Final Meeting
  - Review revised Job Aid and discuss any final changes

Additional Notes:

To stick with this 6-week turnaround:
- Revisions:
  - 2 rounds of revisions on slide deck
  - 1 round of revisions on job aid
  - Additional revisions may result in extending the deadline
- If Option 2 is chosen:
  - Video will not be delivered by the 5/26/23 deadline
  - Video will need an additional 2-4 weeks to produce, depending on:
    - The client's availability for script consultations, and
    - The number of revisions requested