

F2B Pilot Plan Template - Sample

Task	Details	Action Items
Pilot location & dates	<ul style="list-style-type: none"> • <i>Washington, D.C. – April 2, 2001</i> <i>(Travel to Chicago & set up April 3, 2001)</i> • <i>Chicago – April 4, 2001</i> 	<ul style="list-style-type: none"> • <i>Pat will work with Carolyn Craddock to ensure that the space in Portals is ready in time and arranged for catering and AV</i> • <i>Pat will locate inexpensive space in Chicago and arrange for catering and AV</i>
Audience & number of participants in each class	<ul style="list-style-type: none"> • <i>Total of 25-30 participants in each class</i> • <i>Washington, D.C. – ½ SFA & ½ OP</i> • <i>Chicago – Preferably ½ SFA & ½ OP</i> • <i>Diverse group preferred (levels, financial aid experience, years at SFA, ethnicity, SFA unit)</i> 	<ul style="list-style-type: none"> • <i>Pat will identify preferred audience members to ensure a diverse group and Sarah will review the list</i> • <i>Pat and Sarah will also determine back up list</i> • <i>Sarah will work with audience members and their managers to ensure availability</i> • <i>Laura will include the request to have Operating Partner participation in the agenda for the Operating Partner training workgroup meeting</i>
Facilitators	<ul style="list-style-type: none"> • <i>Linda Burkhardt</i> • <i>Stephen Blair</i> • <i>Back up: Deb Tarpley</i> 	<ul style="list-style-type: none"> • <i>Sarah will request participation from Linda, Stephen, and Deb as facilitators</i> • <i>Design team will regularly communicate with Deb and send draft materials to ensure that she is up to speed if needed</i>
On-site logistics coordinator	<ul style="list-style-type: none"> • <i>Pat Reese</i> 	<ul style="list-style-type: none"> • <i>Pat will ensure that the facilities are ready</i>
Development team participation	<ul style="list-style-type: none"> • <i>Laura Miller</i> • <i>Sue Gottlieb</i> • <i>Katie Malague</i> • <i>Pat Reese</i> • <i>Stephen Blair & Linda Burkhardt</i> 	<ul style="list-style-type: none"> • <i>Laura, Sue, and Katie will be taking notes and determining how to change the materials</i> • <i>Laura, Sue, and Katie will make their own travel arrangements to arrive in Chicago on April 3, 2001</i> • <i>Pat will arrange travel for herself, Stephen & Linda</i>
Determine changes from pilot (meeting logistics if necessary)	<ul style="list-style-type: none"> • <i>April 5, 2001 – Discussion and decisions will be made by: Laura Miller, Sue Gottlieb, Katie Malague, Stephen Blair, Linda Burkhardt, Sarah Babson, Pat Reese</i> 	<ul style="list-style-type: none"> • <i>Pat will reserve room for April 5, 2001</i>