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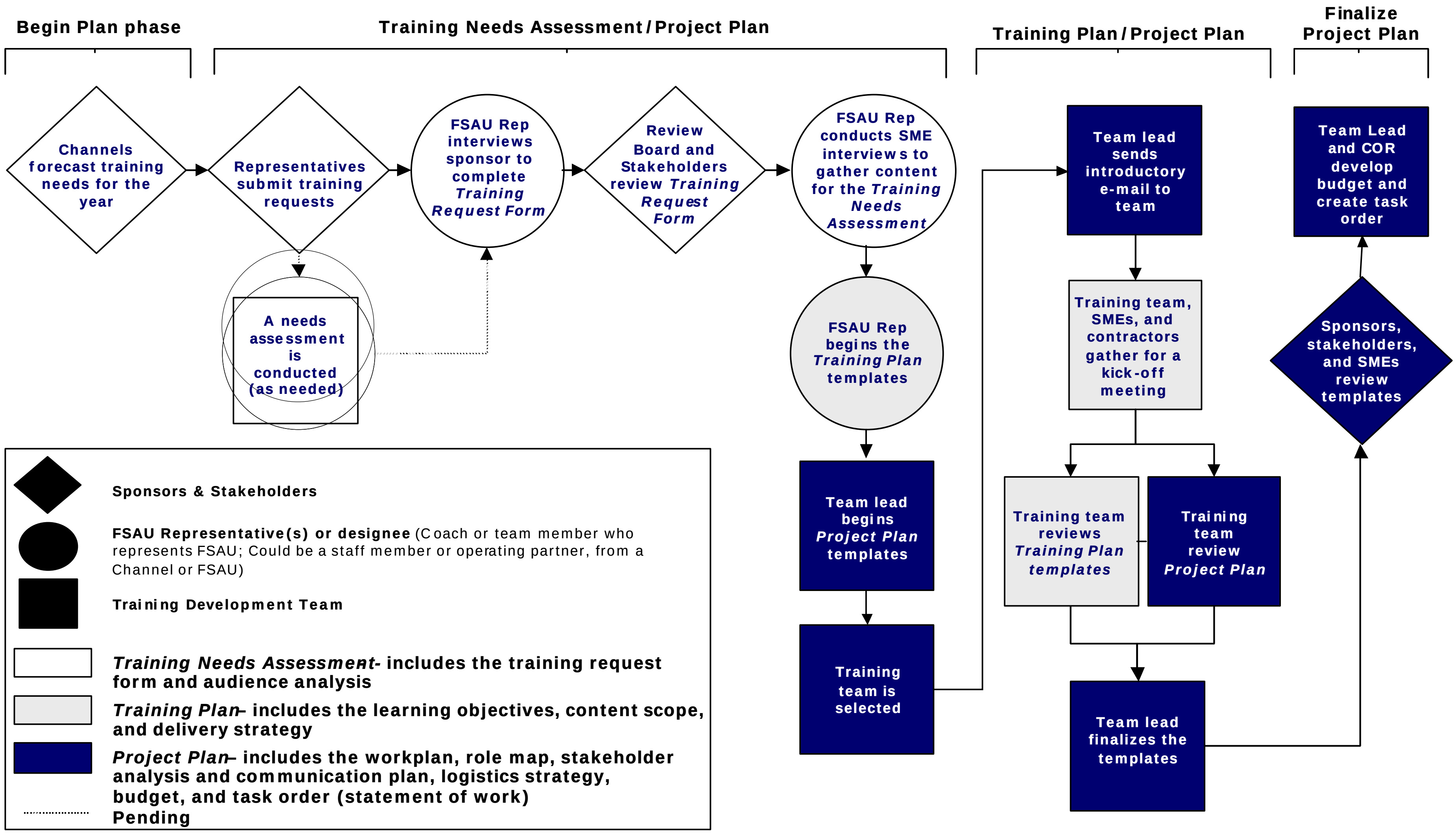
Plan Phase Flow Chart



Plan Phase Overview

This overview lists the Plan phase inputs and outcomes necessary to develop training that is relevant, interactive, engaging, polished, and supported. Refer to the overall process checklist for additional context.

Inputs
What are the necessary inputs to complete this phase?
- ❑ Training request form
- ❑ Audience data
- ❑ System/policy/process/performance changes
- ❑ Historical data

Description/Explanation
What are the components of the Plan Phase?
- The planning phase broadly encompasses two main elements, which proceed on parallel tracks:
  - Needs assessment (including the training needs assessment and training plan)
  - Project planning and management
- The needs assessment answers the following basic questions about the program:
  - Why, who, what, when, where, how?
- Initially, a problem or need is identified, after which a solution is proposed (answering the question “why?”). Then, planning begins to create that solution. The “why,” therefore, serves as the entry criteria for the planning phase.

Why	The training request form (The business reason for conducting the course – sponsorship / sponsor’s goals)
Who	Audience analysis
What	Learning objectives - skills Content scope - knowledge
When	(Tied to why, based on the timeframe of the need/scope of the training effort)
Where	Logistics strategy
How	Delivery strategy

Outcomes
What are the outcomes of this phase?
- ❑ Audience analysis
- ❑ Learning objectives
- ❑ Content scope
- ❑ Delivery strategy
- ❑ Baseline budget
- ❑ Workplan
- ❑ Role map
- ❑ Stakeholder analysis and communication plan
- ❑ Logistics strategy
- ❑ Signed task order

Training Request Form

Proposed course name			
Sponsor(s)		**Primary contact(s)**	
Contact phone number		**Date submitted**	

Please answer the following questions to formally initiate the design & development of the requested program.

Question	Please enter your response in this column
1. What is the training about? Please provide a brief description of the training program, including specific course topics.	
2. Why is the training needed? Explain the reason for conducting this training program.	
3. What are the intended outcomes? Describe what you want participants to learn in the course. What would make this program successful?	
4. Who is the target audience? List customer groups for whom the training is intended. This includes school type and job function.	
5. Who are the stakeholders? List individuals and groups affected by the training, within FSA. Examples include key reviewers, sponsors, channel representatives, etc.	
6. Who are the content experts? List individuals who will provide subject matter expertise during development of this course.	
7. Requested timeframe When should the training program be deployed? What are the delivery constraints or requirements?	
8. Additional comments Please note any additional comments or requests related to this training.	

Conduct Audience Analysis

What is an audience analysis?
An audience analysis identifies groups of individuals for whom the training is intended. It outlines and identifies audience groups and their job activities. This helps target training materials to meet the specific needs of the training audience.

How to perform an audience analysis:
Using the (internal or external) audience analysis template, answer the following questions:

Audience Groups

- Who will need to attend training? Consider job type, geographical location, school type or channel/business function, etc. to combine audience groups

# of People in Each Group

- How many people will need to be trained in this group?

Familiarity with Training Subject Matter

- How familiar is the audience group with the training subject matter? Consider ranking on a scale of 1-6. (1 being the lowest and 6 being the highest. Refer to the classifications on the *Learning Objective Table)*
- What is the job function or major tasks performed by the audience group?

Geography

- Where is the audience group located? Consider the following: National, regional, 50 states, Alaska, Hawaii, Puerto Rico, Guam, etc.

Channel (Internal) /School Type (External)

- What channel is the audience group from? What business function do they represent?
- What type of school does the audience group represent? 4-year, 2-year, private, public, and/or proprietary?

Delivery Considerations
Some examples include:

- How will the time of year training is delivered affect attendance? Conflicts with enrollment? Auditing schedule?
- How will a channel's or school's budget affect training attendance?
- How will the location of training affect attendance?
- Will another organization or vendor offering similar training?
- Will the audience group have access to computers? Is the audience group comfortable using computers?
- Will national, regional or local FSA events occur during training that may affect attendance?

Audience Analysis Template - Internal

Audience Groups	Audience Characteristics				
	# of People in Each Group	Familiarity with Training Subject Matter	Geography	Channel/Business Function	Delivery Considerations

Audience Analysis Template - External

Audience Groups	Audience Characteristics								
	# of People in Each Group	Familiarity with Training Subject Matter	Geography	School Type					Delivery Considerations
				4-yr	2-yr	Priv	Pub	Prop	

Identify Learning Objectives

What is a learning objective?
Learning objectives describe what participants will be able to do after training. Clearly defined objectives provide a sound basis for the selection and development of instructional materials.

The three components of a learning objective:

- What should the participant be able to do? (***Performance/Action***)
  [*See Learning Objective Table for suggestions*]
- Under what conditions should the participant perform? (***Environment/Condition***)
- How well must the performance be done? (***Measure/Criterion***)

How to write a learning objective:
Using the learning objective template, identify the 3 components: performance/action, environment/condition, and measure/criteria. When all three components have been identified, integrate them into a single statement. That statement is the learning objective.

Performance/Action

- States what is necessary for a participant to do and/or produce to be considered competent
  Example: Be able to ride a unicycle. (The performance stated is *ride.*)

- If the statement doesn't include a visible performance, it isn't yet an objective. A performance is described as a DOING word and must be observable.

Doing words (performances)	***Being words (abstractions)***
• run	~~• understand~~
• solve	~~• familiar~~
• write	~~• know~~

Adapted from Benjamin Bloom's Taxonomy of Educational Object
1956 and Robert F. Mager, Preparing Learning Objectives, 1997

Environment/Condition

- Describes the important conditions, settings, and/or special circumstances (if any) under which the performance is to occur. Miscommunication can be avoided by informing individuals what they will have, what they will not have, and/or any special circumstances.

~~***Example:*** *"Be able to run the hundred-yard dash"*~~
Are the runners tricked by unexpected conditions such as having to run barefoot or up an incline?

Examples:
- Given a standard set of tools….
- Using a number two pencil….
- In the presence of an irate customer…
- Without the aid of references…

Measure/Criterion

- Describes how well someone would have to perform to be considered competent
- Provides a standard against which to test the success of the instruction
- Notifies participants when they have met or exceeded expectation

- ***Examples of types of criterion:*** Speed, Accuracy, Quality

***Example*:** Given a computer with word-processing software, be able to write a letter.

Criteria: *All words are spelled correctly and there are no grammatical or punctuation errors*

***Example learning objective*:** Write a letter with word-processing software where all words are spelled correctly and no grammatical or punctuation errors exist.

Learning Objective Table

Phases	Classifications	Definition	Hints	Action Verbs
Decide	***Judgment***	Highest level - refers to making quantitative and qualitative judgments according to a set of specific criteria	• Supports conclusions with data • Defends value of work by use of internal / external criteria	• Appraises • Interprets • Defends • Compares • Criticizes • Attacks • Judges • Supports • Contrasts • Argues
	Synthesis	Refers to combining existing data and information to produce a new product/plan	• Organizes material • Innovates approach • Creates a plan for problem solving	• Categorizes • Modifies • Combines • Summarizes • Concludes • Generates • Compiles • Resolves • Discusses • Predicts • Formulates • Designs • Devises • Determines • Composes • Proposes
Do	***Analysis***	Refers to the ability to break down material into its parts so that relationships among parts are clear	• Distinguishes fact from inference • Assesses fallacies in reasoning • Analyzes relevancy of data	• Separates • Analyzes • Compares • Distinguish • Diagrams • Assesses • Contrasts • Relates
	Application	Refers to the ability to use learned material in a new and concrete way	• Applies theories to practical situations • Constructs charts and graphs • Solves numerical problems • Applies principles to new situations	• Operates • Prepares • Predicts • Produces • Performs • Discovers • Computes • Constructs • Modifies • Classifies • Relates • Solves • Shows • Applies
Know	***Comprehension***	Refers to the ability to grasp meaning of material	• Explains verbal material • Illustrates charts and graphs • Defends facts and principles	• Extends • Generalizes • Paraphrases • Infers • Estimates • Illustrates • Represents • Restates
	Knowledge	Lowest level - refers to recognition of previously learned material	• States common terms • Selects methods and procedures • Recalls basic concepts	• Lists • Indicates • Selects • Outlines • Writes • States • Identifies • Chooses • Reproduces • Names • Recognizes • Underlines • Labels • Matches • Recalls

Adapted from Benjamin Bloom's Taxonomy of Educational Object 1956 and Robert F. Mager, Preparing Learning Objectives, 1997

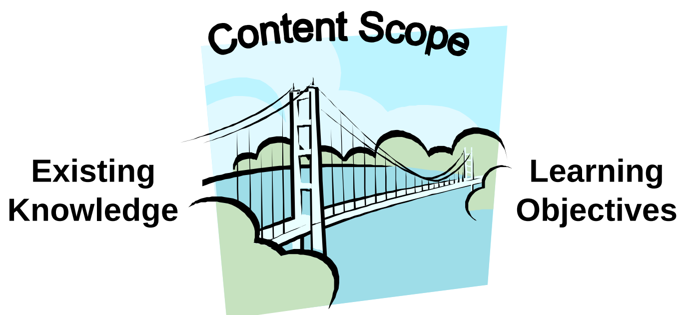
Learning Objective Template

Performance/Action	Environment/Condition	Measure/Criterion	Learning Objective
• What should the participant be able to do? • Is the performance observable?	• What will the participant have/not have while performing?	• How well must the performance be done? • Speed? Accuracy? Quality?	• Related to **outcomes**, rather than **process** for achieving those outcomes • **Specific**, rather than broad • **Measurable**, rather than intangible
Run the 100 yard dash	*Dry, level track*	*Within 14 seconds*	*Run the 100 yard dash on a dry level track within 14 seconds*
Build a query	*In the EDExpress system*	*Find the number of students with “verified” status*	*Build a query in the EDExpress system to find the number of students with “verified” status*

Identify Content Scope

What is content scope?
The content scope provides a list of topics to be addressed by the training course. These topics bridge the gap between existing knowledge and the knowledge necessary to achieve the learning objectives.

How to decide what content is relevant:
Content must be carefully selected to address the audience needs. Consider what is already known by participants and their familiarity with the subject matter. Additionally, identify the critical information the participant needs to know.



How to organize content:

- Sequence content in the order used on the job
- Cover critical tasks (incorporate “need to know” content first, and then, if applicable, “nice to know” content)
- Don’t overload the course with too much information

How to determine the content scope:
Using the content scope template, consider the following questions to determine the high-level concepts that will comprise the content scope for the training program:

Learning objective

- Review the learning objectives.

Content categories

- Review the relevant measure for the learning objective.
- What are the high-level categories addressed in the learning objective?
- Can the categories be combined into similar groups?
- How can the categories or groups of categories be prioritized? Can they be given a level of importance? Ranked? Need to have vs. nice to have?

Key concepts

- Analyze the list of content categories and content groups.
- Review the audience analysis and the audience familiarity with training subject matter.
- Which high-priority category or group of categories includes **new** information the participant needs to achieve the learning objective?
- What are the 1-3 **key concepts** of this category or group of categories?

Content Scope Template

Learning Objective	Content Categories	Key Concepts
• Learning objectives describe what participants will be able to do after completing training • List the learning objectives for the training course in the boxes below	• What are the high-level categories addressed in the learning objective? • Organize the categories into similar groups • Prioritize and/or determine a level of importance for each group	• Which high-priority category or group of categories includes **new** information the participant needs to achieve the learning objective? • What are the 1-3 **key concepts** of this category or group of categories?
Write a check to the delivery person for the correct amount	• *Check date* • *Pay to the order of* • *Check amount* • *Signature*	• *Pay to the order of* • *Check amount*
Build a query in the EDExpress system to find the number of students with "verified" status	• *Software functions* • *Query steps/fields* • *Report printing* • *Data fields* • *Verification policy* • *3 values of verification*	• *Query steps/fields* • *Report printing* • *3 values of verification*

Determine Delivery Strategy

What is a delivery strategy?
A delivery strategy is the medium used to deliver training to participants. To be effective, it must be based on sound learning objectives and compatible instructional strategies. The delivery strategy is what the participants "see" and experience, making it the most visible portion of the instructional design.

For example, the president of the United States may make a speech informing Americans about current events. He may deliver a speech on TV or over the radio. The audience receives the same message, however the mediums, or *delivery strategies*, are different.

Delivery strategy vs. instructional strategy
Delivery strategy (medium)
- Medium by which instruction is presented to participants
- Examples: classroom, videoconference, computer-based/web-based, etc.

Instructional strategy (method)
- Method by which information (content) is organized and sequenced
- Examples: case study, workshop, lecture, game, etc.

The instructional strategy is determined during the design phase. However, both strategies must be compatible with one another for an effective learning product. See the *Instructional Strategies Job Aid* in the appendix to begin to determine high-level instructional strategies.

What to consider when selecting a delivery strategy:
It is important to understand the different training options available. While choosing one training method does not assume that one type of training is 'better' than another, it recognizes the advantages and disadvantages of each type of training for varying types of training needs or training factors.
These factors include:
- Size of audience
- Geographic dispersion
- Complexity of content
- Task simulation
- Collaborative work tasks
- Computer comfort
- Development costs
- Deployment time/costs
- Need for maintenance

Some common delivery strategies include:
- *Classroom-based* - Instructor-led delivery in a structured classroom setting, at a regional or central training facility; may be supplemented by technology
- *Video conference* - Delivery of training/key messages via satellite TV/computer to various remote locations (could include classrooms)
- *Manual/Paper-based* - Learner-controlled/self-study training is self-paced and delivered through paper-based materials
- *Computer-based (CBT)/Web-based (WBT)* - is delivered via a personal computer with the possible combination of sound, graphics, text, and video.

	Classroom-based	Video conference	Manual/Paper-based	Computer-based/Web-based
Size of audience	• Smaller audiences	• Total audience is large	• Total audience is large	• Total audience is large
Geographic dispersion	• Resource availability may be a factor for regional delivery	• Need to quickly get information to a dispersed audience • Reduces travel costs associated with use of a regional site	• Reduces travel costs • Consistent delivery for highly dispersed audiences	• Reduces travel costs • Consistent delivery for highly dispersed audiences
Complexity of content	• Content is unlikely to change • Instructors adapt to audience needs • Knowledge, application, and problem-solving	• Knowledge dissemination and some skill building • Content is likely to change	• Content is unlikely to change • Want consistent delivery • Knowledge, application level	• Content is unlikely to change • Simulate actual tasks • Application or problem solving
Task simulation	• Provides safe practice of skills	• Minimal feedback opportunities	• Minimal feedback opportunities	• Program allows for individualized feedback, proof of mastery • Provides safe practice of skills
Collaborative work tasks	• Exposure to organization, networking, and sharing "war stories" • Allows exchange of ideas, elaboration of content, and feedback	• Collaboration not critical	• Collaboration not critical	• Individualized self-paced instruction
Computer comfort	• Not necessary unless using technology to support delivery strategy	• Could use computers	• Could potentially use computers to download document from web	• Encourages use of computers and/or improves computer skills
Development time	• Depends on the length of course materials • Generally medium	• Depends on the length of the script • Generally low	• Depends on the length of participant materials • Generally medium	• Depends on the length of the CBT/WBT • Generally high to medium
Development costs	• Depends on time frame, complexity of materials, if reuse of existing materials is possible, etc. • Generally medium	• Depends upon locations, talent, special effects, etc. • Generally medium	• Depends on time frame, complexity of materials, if reuse of existing materials is possible, etc. • Generally medium	• Depends on level of simulation, media, interaction, etc. • Generally medium/high
Deployment costs	• Depends on number of locations and number of instructors • Costs will vary based on distribution of materials, printing issues (# of manuals, pages, color graphics, binding) • Generally high	• Cost depends on number of sites being broadcast. Studio time is major cost driver • Generally medium	• Costs will vary based on distribution of materials, printing issues (# of manuals, pages, color graphics, binding) • Generally low/medium	• Costs will vary based on interactivity, graphics intensity, how much video, duplication of CD-Rom discs, etc • Generally low/medium
Need for maintenance	• Low to medium depending on content • Basic skills courses require less while policy/procedure updates require somewhat more	• Low, typically used as a single event or taped live for later viewing	• Medium to high, based on content stability	• Low to medium depending on deployment medium, web based requires more on-going maintenance than CD-ROM
Benefits	• Interactive/motivational, depending on the instructor • High comfort level for participants	• Information is disseminated quickly at a relatively low cost • Reaches a very large audience	• Consistent delivery, learner controlled, flexible completion times/places • Available on-demand at point of need	• Consistent delivery, learner controlled, flexible completion times/places • Individualized feedback • Available on-demand, at point of need
Challenges	• Requires on-going support for trainers and logistics • Only small groups can be trained per session.	• Interaction is impersonal, technology issues may limit audience • Skill building is difficult to measure	• Not interactive	• Programmed content may not meet all learning styles/needs

Delivery Strategy Template

Answer the following questions about the training audience, desired performance, and administration. Once complete, review the factors/answers and prioritize the 3-5 that are essential for a successful training course in the *Priority* column. Refer to the table in the *Determine Delivery Strategy* document to identify a delivery strategy based upon the selected factors.

Factors	Questions	Answers	Priority
Audience			
Size of audience	*How large is the audience?*		
Geographic dispersion	*How is the audience geographically dispersed?*		
Performance			
Complexity of content	*What type of content is it? (Awareness, application, or decision-making?)*		
Task simulation/need to use a system	*Is the participant able to practice or simulate the training content?*		
Collaborative work tasks	*Is the participant able to collaborate with others to perform the training content/tasks?*		
Computer comfort	*Is the participant comfortable using computers?*		
Administration			
Development time	*How much time does it take to develop the training course? (High, medium, or low?)*		
Development cost	*What are the initial and ongoing development costs? (High, medium, or low?)*		
Deployment cost	*How much does it cost to deploy? (Facilities, travel, materials, etc.) (High, medium, or low?)*		
Need for maintenance	*What is the cost to maintain/update materials? (High, medium, or low?)*		

Create Workplan

What is a workplan?
A workplan serves as the roadmap for a project. It is completed by the team lead during the Plan phase, with input from the team. During later phases, it is updated to reflect any changes in timeframe or tasks. A workplan defines the schedule, assigns tasks, and confirms steps are completed as planned.

A project manager and/or team lead uses the workplan to monitor the work effort and to identify issues to be communicated to sponsors, stakeholders, and/or team members.

Things to remember to maintain a workplan:

- Share and actively use the project workplan
- Communicate the workplan with all team members frequently to confirm each individual is on schedule and understands the scope of assigned tasks
- Adjust future deadlines or project scope if earlier work is taking longer
- Investigate reasons for missed deadlines
- Consider risk and mitigation strategies

How to complete a workplan:
Using the workplan template, consider the following:

1. Review major tasks from each phase to develop and deliver the training course.
2. Determine team and/or team member responsible for each task.
3. Assign start and finish dates for each task. When establishing start and finish dates, identify other tasks that must be completed before the new task begins.
4. Identify major activities, decisions, and/or meetings that must be completed for the project to continue. Place a Y/N in the milestones column.
5. Consider all affected by the training project who should be involved in reviews and sign-offs, such as:
    - Sponsors
    - Team members
    - Stakeholders
6. Include comments/status in the workplan, as appropriate. Examples could be:
    - “Complete”
    - “Urgent”
    - “Waiting for approval”
    - “Contingent on task #4”
    - “No longer needed”
7. Ask another project manager and/or team lead to review the workplan to confirm all necessary tasks have been captured and the deadlines are realistic.

<Project Name> Training Workplan Template

ID	Task	Responsible	Dates		Milestone Y/N	Comments/Status
			Start	Finish		
Plan						
1.	**Conduct training needs assessment** (Visualize)					
2.	Receive/complete training request form					
3.	Conduct audience analysis					
4.	**Create training plan** (Determine elements of project's vision and scope)					
5.	Identify learning objects					
6.	Identify content scope					
7.	Determine delivery strategy					
8.	**Determine project plan (Define and prioritize performance factors; cost, time, quality, scope)**					
9.	Receive baseline budget					
10.	Create workplan, Identify milestones					
11.	Identify roles (role map)					
12.	Identify stakeholders and create communication plan					
13.	Identify logistics strategy					
14.	Develop budget and create task order					

ID	Task	Responsible	Dates		Milestone Y/N	Comments/Status
			Start	Finish		
15.	**Project management**					
16.	Conduct kick-off meeting					
17.	Oversee project communication, tasks, and deliverables					
18.	Submit status reports					
19.	Submit milestone chart					
20.	Management sign-off					
21.	**<Insert additional rows for other project specific milestones and tasks>**					
Design						
22.	**Create instructional design plan**					
23.	Create content outline					
24.	Conduct SME/customer review of content outline					
25.	Conduct instructional strategy session (create storyboards & activities)					
26.	Conduct stakeholder review of storyboards					
27.	**Plan evaluation strategy (dry run, pilot, TOT, training course)**					
28.	**Project management**					
29.	Conduct instructional design session					

ID	Task	Responsible	Dates		Milestone Y/N	Comments/Status
			Start	Finish		
30.	Plan review sessions					
31.	Update workplan					
32.	Review and update logistics checklist					
33.	Oversee project communication, tasks, and deliverables					
34.	Submit status reports					
35.	Submit milestone chart					
36.	Management sign-off					
37.	**<Insert additional rows for other project specific milestones and tasks>**					
Build						
38.	**Create course materials**					
39.	Build instructor guide/participant guide					
40.	Create media/presentations					
41.	Develop help/performance support tool(s)					
42.	**Build evaluation instruments (dry run, pilot, TOT, training course)**					
43.	**Conduct testing**					
44.	Plan and conduct dry run					

ID	Task	Responsible	Dates		Milestone Y/N	Comments/Status
			Start	Finish		
45.	Plan and conduct pilot					
46.	**Develop Training of Trainers (TOT) course**					
47.	Customize trainer toolkit					
48.	**Build training logistics**					
49.	Solicit and select trainers					
50.	Select sites and schedule trainers accordingly					
51.	Advertise training program					
52.	Package and ship materials					
53.	**Project management**					
54.	Create training maintenance plan					
55.	Oversee project communication, tasks, and deliverables					
56.	Submit status reports					
57.	Submit milestone chart					
58.	Management sign-off					
59.	**<Insert additional rows for other project specific milestones and tasks>**					
Deliver						
60.	**Conduct Training of Trainers (TOT)**					

ID	Task	Responsible	Dates		Milestone Y/N	Comments/Status
			Start	Finish		
61.	**Implement logistics support**					
62.	**Provide ongoing training**					
63.	Conduct training					
64.	Submit training evaluations					
65.	**Project management**					
66.	Submit status report, workplan, and milestone chart					
67.	Oversee project communication, tasks, and deliverables					
68.	Submit status reports					
69.	Submit milestone chart					
70.	Management sign-off					
71.	**<Insert additional rows for other project specific milestones and tasks>**					
Assess						
72.	**Conduct evaluation and analysis**					
73.	Submit final report: Make recommendations/create action plans					
74.	**Schedule celebration and lessons learned session**					
75.	Celebrate successes					

ID	Task	Responsible	Dates		Milestone Y/N	Comments/Status
			Start	Finish		
76.	Document lessons learned					
77.	**Project management**					
78.	Oversee project communication, tasks, and deliverables					
79.	Submit status reports					
80.	Submit milestone chart					
81.	**<Insert additional rows for other project specific milestones and tasks>**					

Identify Roles

What is a role map?
A role map documents and communicates each team member's individual accountability and responsibility to the project team. The role map identifies the:

- Primary individuals necessary to complete a project
- Responsibilities for each role
- Relationships among roles
- Time commitment required for each role to successfully complete the project

The role map is completed during the Plan phase, after the work effort (workplan) and expenses (budget) have been determined. It is developed by the team leads (with input from the team) and approved by the project sponsor.

How to use the role map template:
Using the role map template, identify the following components for all role categories:

Role categories
- A grouping of roles (and the relationships between those roles) that are necessary to perform a business process, such as *Leadership*, *Project Team*, or *Support*

Roles
- Task(s) within a role category

Responsibilities
- For each role, this states the purpose of the role within the project, key responsibilities, and activities associated with the role
- List critical characteristics necessary to perform the role

Time commitment
- Measured in hours, days, or a percentage of time over months. This varies by project and the level of detail desired

Who/How many
- If individuals are not identified, consider how many people will be needed for each role to complete the project

Role Map Template

	Role	Responsibilities	Time Commitment	Who/How Many
Leadership	Project Sponsor	• Set strategic direction • Control funding • Approve recommendations		
	Project Manager	• Oversee project and monitor team work • Review/approve recommendations and task order		
Project Team	Team Lead	• Establish and support team • Assist in planning, designing, building, delivering, and assessing • Monitor work • Review deliverables		
	Development Team	• Assist in planning, designing, building, and assessing the training course		
	Instructional Designer	• Assist in designing and building the trainer/training materials and help/support processes		
	Trainers	• Assist in delivering and assessing the trainer/training materials and help/support processes		
SME	Subject Matter Expert (SME)	• Provide content to project team • Review materials		
	Target User	• Participate in dry run/pilot tests • Attend and evaluate training		
Support	Finance Lead	• Provide baseline budget for course • Monitor projected training costs • Collect and analyze actual training cost data		
	COR	• Create, review, and award task order		
	SME Support	• Manage SME involvement		
	Communications	• Create & deliver communication plan • Conduct ongoing communications • Advertise training		

	Role	Responsibilities	Time Commitment	Who/How Many
Support	Logistics Coordinator	• Plan and execute logistics strategy • Provide support for training schedule, selections of trainers, and sites • Print & ship training materials		
	Technical Advisor	• Provide technical requirements		
	Graphics Designer	• Create graphics • Develop performance support materials		
	Media Coordinator	• Review & revise scripts, blocking and production schedule • Create media • Create video		
	Maintenance	• Manages ongoing maintenance of network and systems		
	Content Support	• Tracks content related errors		

Identify Stakeholders and Create Communication Plan

A stakeholder is someone who will affect or be affected by the development and/or delivery of the training. During the planning phase, potential stakeholders, and their level of involvement with the project, are identified. This contributes to a communication plan, which identifies the type and frequency of communications to the stakeholders.

A communication plan creates clear and specific messages to support the training program. This keeps stakeholders up-to-date with accurate information, ensuring their continued support for the project. The plan is adjusted to reflect further communication needs. It also maps out the marketing approach for a given project.

Using the stakeholder analysis and communication plan template, consider the following:

Stakeholders: Those who will affect or be affected by the development and/or delivery of the training course.

Interest in Project: The stakeholder's interest in the project will indicate what type information/communication the stakeholder will need.

- **Awareness**
    - Provides information about the training project
    - Explains how the stakeholder may be affected by the training project
- **Understanding**
    - Builds on awareness and develops greater comprehension regarding the project
    - Enhances the stakeholder's knowledge of how the project will personally affect him/her
- **Support/Ownership**
    - Addresses the stakeholder's commitment to the project
    - Develops the stakeholder's enthusiasm about the project
    - Enhances existing endorsement of the project

Communication Needs: What project information does the stakeholder need?
- Some information could include: status, training content, logistics, financial, etc.

Type: How will the communication be delivered?
- E-mail, phone call, meeting, casual person-to-person, videoconference, newsletter, etc.

Frequency: How frequently will the communication be delivered?
- Once, daily, weekly, monthly, etc.

Responsible: Who is the individual responsible for creating the communication?
- Name of the individual who will create the communication

Sender: Who will deliver the communication?

- Name of the individual who will send/deliver the communication

Due Dates

- **Draft date** - Date by which responsible individual will create the communication
- **Final date** - Date by which the final version of the communication will be complete
- **Target delivery** - Estimated date by which the communication will be delivered
- **Actual delivery** - Actual date by which the communication is delivered

Stakeholder Analysis & Communication Plan Template

Stakeholder	Interest in Project			Communication Needs	Type	Frequency	Responsible	Sender	Due Dates			
	Awareness	Under-standing	Support/ Ownership						Draft	Final	Target Delivery	Actual delivery
Those who will affect or be affected by the development and/or delivery of the training course. Examples: FSA Channels, FSAU Staff, etc.				What training project information does the stakeholder need or want?	How is the communication delivered to the stakeholder?	How often does the stakeholder need to receive communication?	Who will be responsible to create the communication?	Who will be responsible to deliver the communication? (May be same as **Responsible**)				

Identify Logistics Strategy

What is logistics?
Logistics planning and support is necessary throughout all phases of the training development and delivery process. Logistics planning is not only necessary for the training course itself, but also for the kick-off meeting, instructional strategy session, dry run, pilot(s), and finale/celebration.

Logistics planning can include: securing sites, equipment, and materials; registering participants; shipping and mailing training materials. A logistics liaison for each training team is identified during the Plan phase. This individual is the point of contact for the team concerning all logistical matters.

Overview of logistics by phase:
Plan

- Conduct kick-off meeting
- Create high-level logistics plan that includes:
  - Training location(s)
  - Types of facility(s)
  - Materials needed – Complete the *Logistical Checklist for Workshops Template (*This can be difficult to complete during the Plan phase because activities/ instructional strategies will not be determined until the Design phase. However, this information is necessary to complete the task order.)
  - Delivery support desired

Design

- Finalize the *Logistical Checklist for Workshops Template* for the training course
- Complete the *Checklist* for the instructional strategy session, dry run, pilot(s), and finale/celebration
- Conduct instructional strategy session

Build

- Conduct dry run and pilot(s)
- Solicit and select trainers
- Select sites and schedule trainers
  - Complete *Training Sites and Training Schedule Template*
- Advertise training program
  - Complete the *Registration System Template* (Used to enter course information onto the Learning Management System (LMS), which is used by participant to register for a course)
- Package materials
  - Complete the *Request to Print Form*

Deliver

- Conduct TOT
- Provide logistics support
- Conduct registration
- Submit attendance data

Assess

- Conduct celebration session

Logistical Checklist for Workshops
Material/Equipment Request Form

Course Information	
Course Name:	Training Dates:
Course Contact:	Telephone/Email:
Need Logistics Coordinator (LC)? YES ❑ NO ❑	Level 1 ❑ Level 2 ❑ Level 3 ❑
Logistics Contact:	Telephone/Email:
Please check appropriate for training course: Hotel RTF School UCP Other	
Tables- (style, number, seating at each)	
Number of Break-out rooms needed:	
Will a contractor secure sites? YES ❑ NO ❑ If yes, please list site contact info and provide a copy of contract to LC. If no, LC will fill in site info.	

Materials Needed

Do you need:	YES	NO	How Many?	Do you need:	YES	NO
Participant Guides to be photocopied by FSAU? Mailed to_______________ By what date? _____________				Roster		
Tape				Certificates		
Posters				Name Tags		
Notebook				Tent Cards		
Tabs for Notebooks				Sign-in Sheets		
Direction Signs				Evaluations		
Easel for Signs						

Other:

Equipment Needed

Do you need:	**YES**	**NO**	**Do you need:**	**YES**	***NO***
Lavalieres			VCR-TV/with Cart		
Hand-held Mike			Screen(s)		
Sound System/Mixer			Easel/Flip Chart/Markers		
LCD Projector/with Cart			CD Player		
Laptop			Podium		
Computers			Overhead Projector		
VHS Camcorder and Tapes			Powerstrip w/Outlets & Ext. Cords		
Is someone bringing an LCD Projector/Laptop? If **No,** request set-up from FSAU/Hotel/School					

Other:

Develop Budget

What is a budget?
A budget is a plan for the labor and expenses of a project. It estimates the training development and delivery efforts by the labor and material/equipment needed to complete the project. Creating a budget helps set expectations, write a task order, and understand the potential cost effects of the training on the FSAU budget.

The role of the finance team
FSAU management defines the training budget annually. The baseline budget is determined for each training project and provided to the team lead during the Plan phase of the project by the finance team. The finance team assists the training team (team lead and COR) in creating budgets and stores the projected costs in a repository called the Cost Analysis Tool (CAT). After the training is complete, the actual training course costs will be collected and entered into the tool as they become available. Utilizing the tool, FSAU will track the budgetary funds expended to the respective training course, analyze the data, and make recommendations to reduce costs.

How to create a budget
After the team lead and/or the COR receive the baseline budget for the course, the scope and costs (delivery costs and labor efforts) are defined. The team lead and the COR will segment the various efforts between FSAU, FSA, and/or the operating partner. This involves reviewing the workplan to identify which party is responsible for the specific tasks to develop and deliver the training course. Once complete, the COR will determine if the revised budget is aligned with the original baseline budget. If so, the task order is written and executed. If not, management approval must be obtained, or scope and effort MUST be reduced.

The team lead is accountable for the quality of the training project, including the financial integrity**.** It is the responsibility of the team lead and COR to:

- Follow the established financial guideline communicated by the finance team
- Compile the workplan and maintain the budget
- Monitor financial performance of the project against the budget plan (This includes frequent communication between the team lead and the COR)
- Report/explain significant deviations from budget (positive or negative) to the finance team

Tips to remember when developing a budget:

- Compare estimates against projects within FSAU. Look for similar scope and/or functionality
- Be aware of the risks and ramifications of a project up front by budgeting for the unknown. Consider setting aside a small percentage of the budget as contingent
- A project's overall complexity can inflate or deflate the labor and expense estimates
- Include time for quality assurance activities, such as, communication, status reporting, and review time