HPT 8981_82 Project Proposal Template

For your project proposal, please create a header with your name in it and class number. Also, create a footer so you have page numbers.

I. Overview of the Project
In a narrative format, provide an overview of this project. Also include important background information about the company and clients you are working for. Include any additional information your project committee should know about the overall project.

II. Overall Project Goal
In a narrative format, describe the overall purpose of this project.

III. Personnel
Indicate the client’s full name and contact information, including e-mail, phone, and address. Indicate Dr. Lanigan as the HPT 8981_82 Project Committee Chair. Indicate two other committee members, that is, the two other GSU faculty members’ names, including their titles and departments. These members have agreed to serve on your project committee as readers to fulfill the GSU requirement of three members on a project committee.

IV. Detailed Project Scope/Strategies/Rationale of Product Deliverables
This is one of the most important sections within the proposal. You need to discuss in DETAIL your tentative plans to carry out each step within the instructional design process. You NEED to explain not only the tools and techniques you will use, but WHY you are using them over other tools; WHEN you are using them; and, provide a RATIONALE that explains your logic for implementing the tools when you do, and so forth.

The project scope must include details, rationale, and strategies for ALL these areas:

- **Preliminary Information Prior to Starting Your Official Needs Assessment Process**
  Briefly discuss your initial client meeting. Next, discuss subsequent meetings to obtain information to create your task listing, which will be used to validate your needs assessment, task analysis, and evaluation tools.

- **Front-end Analysis**
  You need to spell out the entire process clearly and the order you plan on administering all instruments.
**Needs Assessment:** Name the needs assessment tools you are using and explain your rationale for using these tools and the order you are choosing to administer them so we can have an idea of what you will do and why when you carrying out these methods instead of other tools and techniques. For example, why are you using surveys over focus groups. Explain why you are administering the surveys before interviewing employees. Remember: You need at least two tools and extant data does NOT count as a tool.

**Task Analysis:** Use the same strategy here. Explain the tools you will be using, the order of implementation, and why you selected those tools and the order you will administer them. For example, why did you elect to use a Consensus Matrix instead of an S-R Table. Why are you implementing the matrix before the algorithm you intend on creating. Remember: You need at least two task analysis tools not counting the task listing, which is mandatory for all projects.

***IMPORTANT NOTES ABOUT THE FRONT END***
Within both the needs and task analysis sections, you need to be clear how this front-end process will transpire. In other words, you may carry out some initial needs assessment techniques and then bring in a task analysis tool before returning to another needs assessment tool. Regardless of how you employ the needs and task analysis tools, you need to spell out the entire process clearly and the order you plan on administering all instruments.

Also—you need to make sure your needs assessment tools are gathering some type of needs assessment data (i.e., optimals, actuals, performance gaps, causes, or solutions). If you are using interviews to uncover optimal data, then say so. If you are using surveys to collect actuals, then say so. Moreover, your front-end process should flow in a logical way, which means you should be collecting optimals and actuals before you collect data on causes and solutions.

IT IS VITAL that you thoroughly think through how using a particular needs or task analysis instrument will generate what type of data. Don’t just use a survey simply to use a survey. You need to ask yourself—what type of data am I trying to obtain.

**HELPFUL TIP:** After you describe within your proposal text your needs and task analysis tools and process, it is helpful to create a table to summarize your process within your proposal so your committee members can easily see the process you plan on taking. See example below.
<table>
<thead>
<tr>
<th>Step</th>
<th>Tool</th>
<th>Data Hope to Obtain</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Initial Client meeting</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Interviews with SMEs to develop task listing</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td><strong>Interview</strong> the client to use task listing to determine optimals, including all benchmarks.</td>
<td><strong>Optimals</strong></td>
</tr>
<tr>
<td>4</td>
<td><strong>Critical incidents</strong> with SMEs to obtain scenarios of optimal and actual performance that will aid in the use of creating skills and knowledge exams.</td>
<td><strong>Optimals and Actuals</strong></td>
</tr>
<tr>
<td>5</td>
<td><strong>Content Analysis</strong> on all reports to assess actual skills</td>
<td><strong>Actuals</strong></td>
</tr>
<tr>
<td>6</td>
<td><strong>Knowledge Exam</strong> to assess actual knowledge</td>
<td><strong>Actuals</strong></td>
</tr>
<tr>
<td>7</td>
<td>Take optimals minus actuals to determine performance gaps.</td>
<td><strong>Performance Gaps</strong></td>
</tr>
<tr>
<td>8</td>
<td>Run <strong>focus group</strong> to determine causes of gaps and possible solutions.</td>
<td><strong>Causes and Solutions</strong></td>
</tr>
<tr>
<td>9</td>
<td>Distribute a <strong>survey</strong> to further assess causes to see if majority agree with focus group results. Have them rank order possible solutions.</td>
<td><strong>Causes and Solutions</strong></td>
</tr>
<tr>
<td>10</td>
<td>Finalize solutions. Show how the results support the need for training. If there are other solutions that also need to be implemented due to non-training causes, then indicate within your front-end report.</td>
<td></td>
</tr>
</tbody>
</table>

- **Learner/Environmental/Training Context Analysis**
  Go ahead and speculate what you think this might include so the readers get a sense of who your audience is, the environmental they work in, and what the training context will look like, that is, where are you holding this training, what kind of room will you be in,
what is the class layout, location of rest rooms, computer-labs if needed, equipment if needed, how long you think the training will be, and any other important deals.

- **Tentative Training Performance Objectives**
  These might change depending on your needs assessment data but list them any way.

- **Prospective Design Documentation**
  List the documents you think you will be creating such as storyboards, audio scripts, etc.

- **Ideas on Student and Teacher Training manual**
  Tell us your tentative ideas on the format you will use to create these manuals such as how you think you will bind it; why kind of cover do you think you will use; will there be ancillary items such as CDs, maps, etc.; what type of style manual will you use; etc.

- **Discuss how you will deliver the training**
  Will it all be face to face? Will any part be hybrid? Do you expect trainees to work on stuff at home and come back with deliverables, etc. Do you anticipate using videos, audios, web-presentations, etc. And anything else you think you might use for the delivery. Again, these things might change after you carry out the front-end analysis but I want to see you thinking about all these things.

- **Write out your Evaluation Plan and Strategy**
  Tell me every step and rationale for that step. Write it out as if you were talking to someone who doesn’t have an evaluation background. In other words, if you elect to measure pre and post change using a self-efficacy instrument, knowledge exam, and reactionnaire, then tell me why those three instruments are being used and not some others such as skills tests or attitudinal instruments, etc. Tell me why you elect to carry out content and face validity but not predictive validity, if that is your strategy. Don’t just tell me I’m going to measure content and face validity, but explain why you are measuring those two. Use the same process for explaining reliability. If you are using internal consistency tell us why you elected that method over test-retest, for example. This evaluation strategy should be so clear and comprehensive that when I get down to your evaluation point break down I already have an understanding of why you are using those instruments and strategies.

V. **List of Project (not training) Objectives**
Based on all the information from above, create a list of project objectives that covers the entire project. Please put the list in the order you will carry the tasks out.
EXAMPLE:

1. Analyze extant data obtained from client.
2. Develop attitudinal instrument that customer service representatives will answer.
3. Design and run focus group for customer service representatives.
4. Use focus group responses to design survey questions that will be administered to customer service representative.
5. Create task listings for each of the three module topics.
6. Create a consensus matrix in which the customer service sales managers will act as SMEs.
7. Create a critical incident scale to have managers use to rate actual customer services reps. Performances.
8. Determine performance gaps.
10. Develop three hour classroom training.
12. Design participant workbook.
14. Write the reactionnaire.
15. Write the knowledge exam.
16. Validate all evaluation instruments and support reliability.
17. Facilitate three hour classroom training.
18. Enter all data into SPSS statistical software.
19. Analyze pre and post results along with post benchmarks.
20. Write project evaluation report (including SPSS output, evaluation instruments, and analyses).
21. Write overall project report (including my overall experience completing this project, what things worked or didn’t work, what I would do differently, etc).

VI. Tentative Time Table to complete all of the Objectives Mentioned Above
Create a table. Place in all the above objectives into individual table cells. Next to each objective, indicate the personnel needed to complete the task and indicate the completion date.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Personnel Needed to Complete</th>
<th>Completion Date</th>
</tr>
</thead>
</table>

VII. Resources Needed
List all personnel, equipment, tools, rooms, etc. needed to complete the entire project.

VIII. Benchmarks/Grading
Using your evaluation strategies mentioned within Section IV, write out how you will grade your project. If you may want to put this in table format since you will need to do so for your final deliverable. See syllabus page 10.

In addition to the above sections, if you need to add additional sections to add other information not mentioned above, please do so.