

Graduate Annual

Volume 2

Article 10

2014

Performance Appraisal Meeting Fundamentals Project Documentation

MaryBeth Hallman
La Salle University

Follow this and additional works at: <http://digitalcommons.lasalle.edu/graduateannual>

Recommended Citation

Hallman, MaryBeth (2014) "Performance Appraisal Meeting Fundamentals Project Documentation," *Graduate Annual*: Vol. 2 , Article 10.

Available at: <http://digitalcommons.lasalle.edu/graduateannual/vol2/iss1/10>

This Paper is brought to you for free and open access by La Salle University Digital Commons. For more information, please contact careyc@lasalle.edu. Articles published in the Graduate Annual reflect the views of their authors, and not necessarily the views of La Salle University.

Performance Appraisal Meeting Fundamentals Project Documentation

MaryBeth Hallman
Master of Science in Instructional Technology Management
ITM 700 Capstone
La Salle University
Philadelphia, Pa.

Executive Summary

ARAMARK, a large global organization is undergoing a change in their performance management model. In the current model, a performance appraisal form documenting the employee's performance over the past 12 months is to be completed annually. In addition, a performance appraisal meeting should take place between the manager and employee to discuss what has been documented on the appraisal form and to establish performance goals for the coming year. This is currently viewed by management as an activity that needs to be completed just to check a box of completion rather than a tool to improve performance. The performance feedback that managers provide on the appraisal form is generic in nature and meetings to discuss performance rarely happen.

The company is gradually shifting to a pay for performance model. Once the new model is in place comprehensive written performance appraisals will need to be completed and meetings to discuss performance will be required to take place. Due to the size of the company (12 Lines of Business and approximately 255,000 employees globally), the new pay for performance model will be implemented gradually. The first line of business to use the new model will be K-12 Education.

Front line managers within the Education K-12 line of business (LOB), many who are new to management, have not been provided any training on the basics of performance appraisals. Many managers are afraid to facilitate the appraisal meeting not knowing what the employee's reaction will be to their assessment. To address this gap it is proposed that the front-line managers complete a 45-minute e-learning course, *Performance Appraisal Meeting Fundamentals*. The e-learning course will be designed to increase the front line manager's skill level with conducting appraisal meetings by familiarizing them with preparation techniques for the meeting and areas to be covered during the actual meeting. Using mini branching scenarios, it will also address skills and techniques for managing potential emotional responses from the appraisee.

Scope

The final deliverable for this project is One 45 minute e-learning course that will be accessible through ARAMARK's LMS. The course will include graphics and audio and will be created using Articulate Storyline.

The elements included in the *Performance Appraisal Meeting Fundamentals* e-learning module will be understood to meet

satisfactory quality when they are accepted and signed off by Erin D*****, Manager of T&OD and Tiffany E*****, Director of Organizational Effectiveness. Each requirement will be initiated by the members of the team and dated at the time of sign off. Every effort will be made to produce a top quality design and product within the time and budget stated in the project plan. Adherence to project requirements will follow ARAMARK specifications. This requires a sign off after the design phase, and story boards are complete. The project will be considered operational after all requirements are signed off during development and alpha and beta testing are complete.

Product Description

I. Course Title, Length and Description

- a. *Performance Appraisal Meeting Fundamentals*
- b. 45 minute e-learning course
- c. Course Description - This e-learning course will provide first-time managers with skills and techniques needed to facilitate a successful performance appraisal meeting. The course describes ways to prepare for appraisal meetings, addresses specific areas to be covered during the meeting, and provides steps and guidelines to ensure the meeting is effective.
- d. Scope: The course will cover:
 - i. Preparing for the performance appraisal meeting
 - ii. Conducting the performance appraisal meeting
 - iii. Managing emotional responses
 - iv. Setting performance goals for the upcoming year
 - v. Summarizing and ending the performance appraisal meeting

II. Overall Goals and Course Objectives

The overall goal of the course is to provide newly promoted managers within the Education K-12 line of business a structured approach to conducting performance appraisal meetings with each of their direct reports.

Module 1 Objectives: Prepare for the Performance Appraisal Meeting

1. Recognize the benefits of conducting an appraisal meeting
2. Identify the actions the manager should take to prepare themselves for the appraisal meeting
3. Describe the actions the manager should take to prepare the employee for the appraisal meeting

Module 2: Objectives: Conduct the Performance Appraisal Meeting

1. Describe the structure of the Performance Appraisal Meeting
2. Recognize the three components that make up an effective positive feedback statement
3. Apply the four step process to deliver constructive feedback

Module 3: Objectives: Manage Emotional Reactions

1. Identify common reasons emotional reactions occur during the performance appraisal meeting
2. Classify words and phrases that encourage and discourage emotional reactions
3. Determine the appropriate response to an emotional statement/reaction

III. Assessment Evaluation Approach

Quizzes and embedded assessments, including feedback will be used as tools to assess the learners understanding of the content. To assess how well the learner was able to apply the techniques learned in the course a level 3 survey will be included.

Cost Benefit Analysis

For a minimal investment of approximately \$5500.00 all managers within the Education K-12 line of business will be able to access on-line training on how to conduct a performance appraisal meeting. Although the course will initially be designed for the K-12 LOB, sections of the course can easily be modified to reflect performance criteria in other LOB's as well.

The cost of not creating an online course on the topic is that managers will receive no training on the skills and techniques needed to conduct an effective meeting. Managers site the reason they do not meet with their employees to discuss performance is due to their lack of knowledge in how to do it effectively. Although there are currently no reports of law suits filed against ARAMARK due to unfair appraisals it is something that should be considered as they move to the new pay-for-performance model.

Checklist for Subject Matter (Content) Experts

SME Name	Contact Information
Erin D***** Manager T&OD, Refreshment Services	-Erin@aramark.com
Marcy D***** Program Manager T&OD, Higher Education	-Marcia@aramark.com
Kim H***** Human Resource Director	-Kim@aramark.com

The most effective way to provide instructional designers with content for an e-learning project is to think about it as a lesson you wish to teach. Do not worry about how you are going to teach it, just think about the subject and what is important for them to know.

1) Outline what content is important and in what order it might be presented.

a) Describe the appraisal process

i) Performance is formally reviewed on an annual basis using the performance appraisal form

ii) Managers should be keeping performance records updated throughout the year and not just when the appraisal form is due

iii) Managers should offer feedback and coaching to the employees throughout the year and not just at the appraisal meeting – the employee should not be “surprised” at the performance meeting

b) Benefits of appraising performance

i) Manager

(1) More engaged employees

(2) Better performance

ii) Employee

(1) Clear understanding of performance expectations

(2) Increase productivity

iii) Organization

(1) Provides record for possible promotion

(2) Demonstrates fairness in performance management practice

- c) Conducting the performance appraisal meeting
 - i) Put the employee at ease
 - (1) Meet in neutral location
 - (2) Describe purpose of meeting
 - ii) Discuss performance
 - (1) Start with employee self-assessment
 - (2) Discuss what they are doing well
 - (3) Discuss areas for improvement in a non-judgmental way
 - (4) Set goals for the next year
- d) How to deal with an emotional response during the appraisal meeting

2) List any prerequisites, knowledge or understandings or skills.

Managers should be familiar with the annual performance review cycle in their line of business. Some LOB's review performance based on fiscal calendar and some on annual calendar. They should also be familiar with the review form in their LOB.

*Please note: How to complete the review form in each LOB is out of scope for this project

3) To illustrate the major points, existing ARAMARK ILT materials from different lines of business will be gathered. Within those materials examples and non-examples that may help to clarify the points are provided.

4) Prepare a list of case examples or real life activities that might help the learners get the main points.

MaryBeth Hallman will create case examples and activities and verify with ARAMARK project team members that they are appropriate for instruction.

5) Supply any tests or assessments you currently use.

MaryBeth Hallman will be responsible for tests and assessments used in the e-learning.

6) Supply any narration or text items that might help.

a) Existing ILT courses and job aids will be gathered from the different lines of business. ARAMARK has given permission to use any applicable narration and text from those courses.

7) Behaviors you want the learners to be able to demonstrate

- a) How to deliver the appraisal – what verbiage should and/or shouldn't be used
- b) How to reinforce good performance
- c) How to provide constructive performance feedback - include specific performance that needs to improve and brainstorm ideas of how to improve it

8) Describe any concepts you need the learners to understand

- a) The performance appraisal, when facilitated correctly, contributes to better performance and employee engagement
- b) Performance feedback should be provided throughout the year
- c) The employee should never be surprised by information they hear in the appraisal meeting

9) At this time there are no special terms or vocabulary that will need to be addressed.

10) Are there any other sources (people, web sites, consultants) that might be helpful?

a) Existing ILT courses and job aids have been gathered from the different lines of business.

11) Go back to your outline and write down any key points would tell your class if you were teaching this face to face. Write it like you were talking to the class. Do not worry about formatting.

a) At this point it is not necessary to create a list of key points. Key points will be gathered from existing ILT materials.

12) If there are any specific assessment needs include those.

ARAMARK has left it to the discretion of MaryBeth Hallman to create any necessary assessments for the e-learning module.

Letter of Intent

MBH Design
 La Salle University
 Instructional Technology Management
 1900 West Olney Avenue
 Philadelphia, PA 19141

ARAMARK Inc
 1100 Market Street
 Philadelphia, PA 19107

February 3, 2013

Letter of Intent for: ARAMARK Inc.

Dear ARAMARK,

This letter sets forth the terms of your agreement with MaryBeth Hallman (hereafter “MBH DESIGN”) to perform services and/or create materials in connection with the “Work”) for you (hereafter the “Client”), your grantees and licensees.

1. Materials. In order to facilitate completion of the Work, the Client agrees to provide the following materials (the “Materials”) for inclusion in the Work by February 5, 2013:

- Electronic copy of previously developed ILT workshops
- Permission to use any content found in ILT classes including graphics, written text, scenarios and examples.

2. Delivery. MBH DESIGN agrees to deliver the Work to the Client according to the following schedule:

Project Stage	Responsible Party	Target Date
Needs Assessment Findings	MBH DESIGN	February 8, 2013
Review & Approval of Learning Objectives	MBH DESIGN, ARAMARK	February 15, 2013
Storyboard	MBH DESIGN	March 8, 2013
Review & Approval of Storyboard	MBH DESIGN, ARAMARK	March 11, 2013
Alpha Review Prototype	MBH DESIGN	April 8, 2013
Beta Review & Approval Prototype	MBH DESIGN, ARAMARK	April 15, 2013
Final E-learning Module	MBH DESIGN	April 22, 2013

3. Compensation. MBH Design is performing the work pro bono as part of the Capstone requirement in Instructional Technology Management (ITM) at La Salle University.

The Work shall be considered complete when MBH DESIGN delivers the materials specified under **Delivery** above and is not contingent on their actual use on the LMS.

4. Future Rights/Royalties. All work and related content are intellectual property of ARAMARK Inc.

5. Advertising/Promotion. The Client authorizes MBH DESIGN to make reference to the Work in promoting its efforts and performance and to cite the Work in its advertising and promotions.

6. Confidentiality. Except as noted below under exceptions, MBH DESIGN agrees to treat all information provided by you in connection with this Letter Agreement and the Work, as proprietary and confidential, whether or not so identified, and shall not disclose the whole, or any part thereof, to any third parties, without your prior written consent.

Exceptions: In advancing the further development of the present product or the development of subsequent products directly based upon this work, MBH DESIGN may share with those it deems appropriate details of the Work or demonstrations of the product. MBH DESIGN shall make every effort to protect the Work from potential competitors.

7. Editing/Approvals/Changes. MBH DESIGN recognizes the importance of accuracy in the Work. The Client will be provided two opportunities to approve the content of the Work. The first of these will be considered to have been completed when you receive the alpha version of e-learning module. You will have one additional opportunity to make minor editorial changes in the content for each module: when you receive the beta version of a module. The deadline for submitting any such minor editorial changes for a module shall be 3 business days from the delivery of the alpha version of that module (see **Delivery** above). Changes shall be deemed to be “minor editorial changes” if they do not exceed 5% of the content (as determined by MBH DESIGN).

The Client will incur additional charges if you request changes that exceed 5% of the content or if you request changes after the specified second date for changes. MBH DESIGN will notify you in writing of such additional charges. These additional charges will be reflected in the final invoice and your signature below shall serve as your agreement to such charges. Changes above and beyond the 5% level or changes after the specified date may also cause MBH DESIGN to modify the delivery dates specified. If such a modification of delivery dates is required, MBH DESIGN will notify you in writing.

8. Termination. The Client may terminate this agreement by providing MBH DESIGN with a letter stating the reason for such termination. If the Client fails to deliver the Materials by the due dates specified above, MBH DESIGN may terminate this agreement by providing the Client with a letter stating that cause.

9. **Copyright and Use Restrictions.** You attest that any Materials supplies to MBH DESIGN, regardless of medium, shall be free of copyright or trademark infringement and that MBH DESIGN shall not, therefore, be held liable for any such infringement or violation, should such be subsequently discovered. In turn, MBH DESIGN attests that any materials it supplies in completion of the Work shall similarly be free of copyright or trademark infringement and that the Client shall not, therefore, be held liable for any such infringement or violation, should it be subsequently discovered.
10. **Warranties and Representations, Indemnity.** You warrant and represent that you have full right and power to enter into this Agreement; that you have rights to the Materials and that all necessary permissions and releases have been obtained by you prior to the use of those Materials; and that the Materials will not contain any libelous or otherwise unlawful material or violate any copyright or personal or proprietary right of any person or entity. You will defend any claim of breach of warranty and, if it is determined that you breached the warranties set forth herein, you will indemnify MBH DESIGN for any loss it may suffer as a result of such a breach. You acknowledge that the warranties and representations herein shall survive the termination of this agreement.
11. **Miscellaneous.** This Agreement sets forth the entire agreement and understanding between you and MBH DESIGN, and supersedes any prior agreements or understanding, whether oral or in writing. This Agreement and the rights and obligations of the parties shall be governed and construed under the laws of the State of Pennsylvania as if executed and fully performed therein. You may not assign or delegate your duties hereunder and any such purported assignment shall be void.

For: MBH DESIGN

By: _____

Name: MaryBeth Hallman Title: Instructional Designer

Agreed and accepted this 1 day of February, 2013.

For: ARAMARK, INC

By: _____

Name: Erin D***** Title: Manager, T&OD, Refreshment Services

Agreed and accepted this 1 day of February, 2013.

Needs Analysis Report

Submitted by: MaryBeth Hallman

ITM700

Date 2/5/13

Background

The Director of Organizational Effectiveness and the T&OD Manager within the K-12 Education line of business have requested an e-learning course be developed on how to conduct a performance appraisal meeting. The organization is currently undergoing a change to the performance management model and moving to a pay-for-performance approach. As a result, comprehensive written performance appraisals will need to be completed and meetings to discuss performance will be required to take place. Currently, appraisals are completed but do not contain substantial performance information and meetings to discuss performance with direct reports happen inconsistently. It is assumed that Front line managers, many who are new to management, have not been provided any training on the basics of performance appraisals.

The pay-for-performance model will be fully implemented in 2014. The performance appraisal process and forms are undergoing a redesign and will be completed within the next 12 months. The organization would like to begin training managers on how to facilitate a performance appraisal meeting since that course topic is not contingent on a specific performance management model or appraisal form.

Purpose

The purpose of the needs assessment is to determine if the inconsistency in conducting performance appraisal meetings is due to lack of training, experience of those involved, or some other factor.

Performance Needs Identified

To improve the effectiveness of performance appraisal meetings:

- Appraisal meetings between manager and employee need to take place annually, after the appraisal form has been completed but before employee pay increases have taken effect
- Meetings need to be scheduled in advance and planned for
- The purpose of the appraisal meeting needs to be clearly communicated
- Managers need to listen more than talk during the meeting
- Performance expectations need to be clearly communicated during the meeting
- Performance/Development goals for the coming year need to be discussed and agreed upon by manager and employee

Learning Needs Identified

To improve the effectiveness of the performance appraisal meeting Managers must be able to:

- Prepare for the appraisal meeting
- Discuss both positive and constructive performance feedback with employees
- Respond to emotional reactions during the meeting
- Identify performance/development goals for the coming year

Audience Profile/Learner Needs Identified

- Front-line Managers are typically new to management (less than 2 years managerial/supervisory experience)
- Typical ages range from 22 – 35; it's estimated that 65% are male and 35% are female
- Most work in fast-paced environments and work hours vary by function; some work 9 to 5 and some work shift work.
- They are not used to sitting in a classroom for any length of time
- All have daily access to computers and the internet at the client site
- They are receptive to training but have recently seen an increase in mandatory e-learning being assigned to them so there may be some resistance to one more class being added to the list

Data Gathering Methods

The following were used as information gathering tools for this assessment:

- Interviews with T&OD Directors and/or T&OD Managers from the following Lines of Business:
 - Business Dining
 - Refreshment Services
 - Education
 - Corrections
- Interviews with Front-line managers in the following Lines of Business:
 - Education
 - Business Dining
 - Refreshment Services
 - Sports & Entertainment

- Corporate

- Interview with Manager of Organizational Effectiveness
- Review of existing training material from the following Lines of Business:

- Business Dining
- Refreshment Services
- Education

- Review of the Corporate Performance Management intranet site

Data Summary

The interviews were conducted utilizing mainly scripted questions that didn't vary greatly between the groups interviewed. The following questions provided the most revealing information:

What is the perception of the performance appraisal process within the organization?

All interviewees indicated that the performance appraisal process is not taken seriously in the field. Currently there is no central tracking system to identify if appraisals have been completed or if the performance appraisal feedback meetings are taking place between Managers and employees. The appraisal process and forms vary by line of business and it is up to regional HR in each LOB to track what has been completed. The common view was that Front line Managers did not understand the purpose of the appraisal process, the importance of completing the forms timely, or how the performance appraisal meeting can contribute to employee engagement and performance improvement.

How do Front-line managers learn about the performance appraisal process and how to conduct appraisal meetings?

Answers to this question varied by Line of Business. In the past some LOB's conducted VILT to discuss the process, some provided documents outlining the process on their intranet sites, some designed PPT decks and left it up to the regional HR professionals to deliver the training, some offered ILT.

A commonality between all the interviewees was that formal training has not been offered to Front-line managers within the past two years. Any training that is offered is voluntary and no training records exist to identify who has participated and who hasn't or if the training made an impact on performance.

Are performance appraisal meetings a normal part of the Performance Management process and are they done effectively?

Common answers included:

- Managers that came to ARAMARK with previous managerial experience are more likely to hold the performance appraisal

meeting. They have received training (elsewhere) on the importance of the process and understand how performance feedback can influence future performance.

- Most newly promoted Front-line Managers (FLM's) do not conduct the meeting. Appraisal forms are completed and signed by both the Manager and employee and handed into HR but the actual meeting to discuss performance does not take place.
- Many of the FLM's interviewed cited the following reasons for not holding the meetings:
 - Not feeling prepared to hold the meeting
 - Did not know what to discuss in the meeting
 - Were afraid of the employees reaction to negative performance feedback
 - Did not have the time to meet with all direct reports
 - Did not have an office to meet with the employees
 - Their managers did not hold performance feedback meetings with them so they didn't think they were important

What would help the Front-line Manager feel more prepared to conduct the performance appraisal meeting?

Interviewees all stated that some form of training (VITL, ILT, or e-learning) should be offered to all newly promoted Front-line Managers and that training content should be consistent across lines of business. Having an opportunity to practice the feedback conversation prior to the actual meeting was also recommended.

If training were to be developed on the topic of Performance Appraisal Meetings, what should it cover?

Common answers included:

- The purpose of the performance management process
- Why the performance appraisal meeting is important
- How to prepare for the performance appraisal meeting
- What should be discussed in the meeting
- How to deliver constructive feedback
- How to handle emotional reactions from employees in the meeting
- What happens next – how to begin preparing now for the performance appraisal next year

It was suggested that detailed training be developed on how to complete the appraisal form. Since the forms and process vary in each line of business it would be difficult to include that information at this time.

Review of Existing Training Materials

Training materials vary by Line of Business. The majority of the content is focused on the appraisal process within the LOB including due dates and forms to use. The appraisal meeting is mentioned as part of the appraisal process but there is no direction provided on how to successfully facilitate a performance feedback meeting.

Review of Corporate HR Intranet Site

The majority of the content contained on the Corporate HR Intranet Site is targeted to employees rather than the Front-line Manager. Content available includes an e-learning describing the current organizational competencies, a downloadable performance appraisal form and instructions on how to complete the form. Information targeted to Front-line Managers includes an e-learning on how to enter career development information in People Center software. Information on the performance appraisal process was not found.

Recommendations

Training Recommendations

- Design an e-learning course for newly promoted Front-Line Managers to prepare them to conduct a performance appraisal meeting. Although the content of the course is appropriate for managers within all lines of business it is recommended that the scenarios used to demonstrate the concepts be line of business specific. Initially the course will be designed for the Education K-12 LOB. Once designed, the course can then be modified to fit the specification within other LOB's. The course will be broken down into three separate modules ranging from 10 to 20 minutes in length.

Module 1 Objectives: Prepare for the Performance Appraisal Meeting

1. Recognize the benefits of conducting an appraisal meeting
2. Identify the actions the manager should take to prepare themselves for the appraisal meeting
3. Describe the actions the manager should take to prepare the employee for the appraisal meeting

Module 2: Objectives: Conduct the Performance Appraisal Meeting

1. Describe the structure of the Performance Appraisal Meeting

2. Recognize the three components that make up an effective positive feedback statement
3. Apply the four step process to deliver constructive feedback

Module 3: Objectives: Managing Emotional Reactions

1. Identify common reasons emotional reactions occur during the performance appraisal meeting
2. Classify words and phrases that encourage and discourage emotional reactions
3. Determine the appropriate response to an emotional statement/reaction

It is recommended the course be accessed through the company LMS and is assigned as required to all Education K-12 Front-line Managers with less than two years managerial experience. For all other Management positions within Education K-12 the course should be made available by searching within the LMS but does not need to be assigned.

Non-Training Recommendations

- Standardize the performance management process and forms across the Lines of Business to reduce confusion and encourage adherence to policy
- Create a central tracking or repository site for all performance appraisals
- Encourage District Managers to coach Front-line Managers on feedback skills
- Encourage FLM's and employees that do not have a neutral space to conduct the appraisal meeting to meet off-site. This may include reimbursing minor expenses.

Proof-of-Concept

1. Abstract.

The purpose of this document is to describe why MBH DESIGN believes that the design of the Performance Appraisal Essentials e-learning course will be successful in educating first-time managers, within the Education K-12 LOB of ARAMARK, in the best practices of performance appraisal meetings.

2. Learner characteristics.

Use the "Learner Characteristics" form below, or one of your own design to describe the important characteristics of your target audience.

Item	Learner Characteristics
Age*	The majority of first time managers fall in the range of 20 – 35 years of age. Although the course will be targeted toward the first time manager it will be accessible to managers at all levels and age ranges within the Education K-12 Line of Business.
Educational level	All managers are required to have a high school diploma; some have undergraduate and graduate college degrees.
Reading level	Participants must be able to read and understand English at an 8 th grade level.
Motivation	<p>This course will be required for Front-line Managers within the Education K-12 LOB with less than 2 years of experience. Results from a focus group indicate that these managers want to improve their skill and want training however there has been a significant increase in the amount of required training they have been assigned in the last year so the timing of the assigned course will need to be taken into consideration.</p> <p>Although this course will not be required for managers with more than two years of managerial experience, it can be made accessible. For those participants who wish to take the course voluntarily they will need to be self-motivated to complete the course and put the practices learned into action.</p>
Prerequisite knowledge	<p>Managers should be familiar with the performance management review cycle and the required performance assessment forms within the Education K-12 LOB. In addition they should be familiar with the performance criteria the employees are evaluated on. Although this information will not be taught in the class it will be referenced in some scenarios.</p> <p>It is assumed that the learners have no prerequisite knowledge of how to conduct the appraisal meeting. Training on this topic has not been provided by ARAMARK in the past.</p>
Prerequisite skills	There are no prerequisite skills necessary.
Facility with a computer & the Web	All ARAMARK learning content is accessed using the LMS. Managers are familiar with how to access the LMS, search for and complete courses.
Access to computers and the Internet	Managers within the Education K-12 LOB will have access to computers and the internet during their workday at the client site.
Time availability	The LMS that will house the course is available via internet 24/7 to meet the availability of the participants.

Other issues:

1. Need to allow for physical disabilities? No
2. More than one language required? Not at this time.
- * The reason for asking about age is that people of different ages have varying characteristics that may affect learning, such as attention span, time since last formal learning experience, attitude towards computers, and so on. Many organizations will be reluctant to disclose age information. In these cases, you may be able to get summary data.

3. Constraints.

Use the “Constraints” document below or one of your own design to describe the important constraints under which the final project will be developed.

Constraints: Hardware

Computers: PC	Details and comments
RAM:	
Monitor resolution:	Minimum requirements are 800 x 600. 1024 x 768 recommended.
Sound Card:	Required
Network:	
Processor:	600 MHz minimum requirement (Pentium III)
Hard Drive capacity:	N/A – accessed through LMS
Modem speed:	High Speed Internet

Constraints: Software

Computers: PC	
Operating system, including release number:	N/A Any computer issued by ARA-MARK will be capable of accessing the LMS and running the course.
Browser, including version number:	Internet Explorer 6 and later, Google Chrome
Authoring system required:	N/A Course will be developed using Articulate. Participants viewing the class will not require any special software.
Testing system required:	N/A Any computer issued by ARA-MARK will be able to test the course.
Other:	

Constraints: Timelines.

Final deadline:	
Intermediate deadlines: (List all deadlines here, for both client and developer.)	
Deadline 1: February 8, 2013	Delivery of Needs Assessment Findings
Deadline 2: February 15, 2013	Review and Approval of Learning Objectives
Deadline 3: March 8, 2013	Complete Storyboards
Deadline 4: March 11, 2013	Review and Approval of Storyboards
Deadline 5: April 8, 2013	Review of Prototype - Alpha
Deadline 6: April 15, 2013	Review of Prototype - Beta
Deadline 7: April 22, 2013	Final e-Learning module, Project Signoff

Constraints: Client Responsibilities.

Primary contact persons		
Contract negotiation and legal:	Erin D*****	
Project coordination:	Erin D*****	
Subject-matter: (Name SME contacts, availability, and any other constraints.)	Erin D*****, Marcy D*****, Kim H*****	
Assets: (Such as video, audio, artwork).		
Technical: (Hardware, networks, Web master).	Roxanna G*****, Director of Learning Services (LMS)	
Billing:	N/A	
Required actions:		
Providing materials: (Scripts, assets, etc. Include persons responsible for doing and for sign-off.)		
Item 1: Existing ILT courses, Sample performance evaluation forms, performance evaluation criteria	Marcy D*****, Erin *****	
Item 2: LMS style guide	Roxanna G*****	
Item 3:		
Item 4:		
Required reviews and turn-around: (Include persons responsible for doing and for sign-off.)	Timeline	Person Responsible
Review 1: Approval/sign off of learning objectives	3 Days	Erin D*****, Tiffany E*****
Review 2: Approval/sign off of storyboard	3 Days	Erin D*****, Tiffany E*****
Review 3: Alpha review of prototype – provide feedback on edits necessary	2 Days	Erin D*****, Tiffany E*****
Review 4: Beta review & sign off of prototype before final development	2 Days	Erin D*****, Tiffany E*****
Review 5: Final project sign off	1 Day	Erin D*****, Tiffany E*****
List required client actions with timelines: (For example, required reviews, turn-around times, sign-off requirements, and so on.)		
Action 1: Provide feedback on learning objects	3 Days	Erin D*****, Tiffany E*****
Action 2: Provide feedback and approval of storyboard	3 Days	Erin D*****, Tiffany E*****
Action 3: Alpha review of prototype – provide feedback on edits necessary	2 Days	Erin D*****, Tiffany E*****
Action 4: Beta review of prototype before final development	2 Days	Erin D*****, Tiffany E*****
Action 5: Final project sign off	1 Day	Erin D*****, Tiffany E*****
Invoice payments:		
Payment 1:	N/A	
Payment 2:	N/A	

Constraints: Developer Responsibilities.

Primary contact persons	
Project management:	MaryBeth Hallman
Billing:	N/A
Design:	MaryBeth Hallman
Content:	MaryBeth Hallman
Graphics and other assets:	MaryBeth Hallman
Implementation:	MaryBeth Hallman
Technical:	MaryBeth Hallman
Required Documents	
Design:	Project Summary, Learning Objectives, Storyboards developed by MBH
Interface:	Mockup provided by MBH
Script:	Storyboard provided by MBH
Database:	N/A
Deliverables (List all deliverables with dates.)	
Deliverable 1: 2/8/13	Needs Assessment Findings
Deliverable 2: 2/15/13	Learning Objectives
Deliverable 3: 3/8/13	StoryBoards including Script
Deliverable 4: 4/8/13	Prototype Alpha
Deliverable 5: 4/15/13	Prototype Beta
Deliverable 6: 4/22/13	Final

4. Timesheet

The purpose of this timesheet is twofold. The first is to give you practice in keeping track of how much time you devote to a project, something that many people have not done. Second, it will give you firsthand knowledge of how much time it takes to design self-paced programs.

Each time you work on your final project, fill out the form. If you run out of space, just add some more rows.

Date	Hours	Comments on how you spent your time
2/4	1.5	Meeting with Client to discuss performance need
2/5 – 2/7	8	Conducting Needs Assessment & reporting results
2/13	1.0	Meeting with client to review learning objectives
2/15 – 2/19	20.0	StoryBoard module 1
2/20 – 2/25	20.0	StoryBoard module 2
3/2 – 3/3	16.0	Develop module 1 in Articulate Storyline
3/16 – 3/17	16.0	Develop module 2 in Articulate Storyline
3/19 – 3/20		Client Review
3/30 – 3/31	4.0	Edits based on client review