

TO: Andy Carter, Director of Annual Giving
 Dr. Jennifer Goode, Technical Communication Instructor

FROM: Vickie Eades & Sydnei Mayers

DATE: October 20, 2020

SUBJECT: Phonathon Project Plan

INTRODUCTION

The purpose of this document is to provide a plan for the Mercer Phonathon Project. The goal of the project is to provide training material that best fits the needs of the Phonathon student workers. Additionally, the goal will be achieved by analyzing, designing, developing, implementing, and evaluating our training materials. Our primary objective is to increase the number of donors that student workers are able to gain.

PROJECT TIMELINE

Below is a chart detailing the milestones of our project and their corresponding due dates.

Milestone	Description	Due Date
Initial Client Meeting	Meet with Director Carter to get an overview of the project.	10/14
Project Plan	Create a schedule of the milestones and when they are to be completed	10/20
Needs Assessment	Assess the learners' gaps. Determine the current state of the learners compared to their desired state.	10/22
Interview Learners	Interview current phonathon workers to get deeper insight into who our audience is and gain better understanding of what training materials will work best for them.	10/27*
Learner Analysis	Analyze the learners in order to identify possible incompatibilities between the learners current state and their goals. Determine where the learners have "gaps" in knowledge, skills, and/or attitudes.	10/28
Client Meeting	Meet with Director Carter to discuss what we have found so far and make sure we are on track with what he wants.	10/28*
Content Analysis	Analyze current phonathon content, determine what goals training is trying to meet, and determine the best way to get learners to this point. This analysis will focus on how to use content to alleviate learner "gaps" in knowledge, skills, and/or attitudes.	10/29
Context Analysis	Analyze the context in which the instruction will take place, the context during the actual training,	10/29

	and the context in which the learners will eventually use their new skills.	
Learning Objectives	Develop a set of clear objectives that will be the basis for selecting or developing instructional materials, as well as a means for evaluating whether or not the instruction will be successful.	11/3
Client Meeting	Meet with Director Carter to discuss our learning objectives and ensure we are meeting his expectations.	11/3*
Learning Strategies	Outline the instructional activities we want to present to the learners to help them achieve the goals.	11/5
Instructional Materials	Develop instructional materials such as student guides, videos, online crash courses, etc.	11/17
Evaluation Plan	Generate evaluation instruments. Also, develop a formative and summative evaluation plan.	11/24
Final Project Report	Write a final report that will consist of all of our findings and procedures.	12/4
Final Presentation	Provide a brief presentation that summarizes the entire project.	12/4

* tentative date

CONCLUSION

To ensure that we remain on schedule, we intend to present our final report and our training materials by December 4. Director Carter, please let us know if this presentation date works for you. If you are unavailable on the 4th, we can arrange another time to present our findings to you individually.

Please let us know if you have any questions or concerns about the schedule. We look forward to working with you on this project, and thank you for this opportunity.