PTT (W-2) Classroom and Webinar Project Management Tool (PMT) Instructions

COURSE TITLE

Course Title – The name of the course. Check with the Training Coordinator and State Lead before changing the title of an existing course.

DATES

Initial PMT Date – The date the PMT is first created and approved.

Current PMT Date – The date of the most recent version of the PMT.

Updated PMT Dates and Reasons for Change – Each time the PMT is updated after the Initial PMT Date, list the update date and the detailed reason for the change.

TRAINING PROGRAM INFORMATION

Purpose and Learning Objectives – The purpose is the “Big Picture” statement. A purpose statement is an answer to the question, “Why?” “Why are conducting this training?” Learning objectives should be observable; what they will know, what they will be able to do. Select the correct verbs to begin each learning objective based on the training goals, i.e. awareness, knowledge, application to the job, skills acquisition.

PMT PROCESSES

Send all PMTs (initial and updated) to the following:

- Dave Turk
- Mark Schmitt
- Appropriate State Lead(s)
  - Danni Grochowski (W-2 NWT)
  - Sally Hilsgen (ECM courses)
  - Heather Sommers (W-2 Policy & Process courses)
  - Lynda Fischer (Child Support courses)

Notes

Participation in a PTT project by external staff must be approved by the appropriate section manager. When a PMT is ready to implement, submit the request for external editors to the assigned State Lead(s) who will request an assignment from the appropriate section manager.

PROJECT PLANNING

Identify Project Lead (Lead/Team) – This is typically completed by management. The Project Lead is the person responsible for coordination of all tasks and completion of the project. The project team is responsible for project development as directed by the project lead. The project team may be modified in further planning steps.

Estimated Delivery Date – To be provided by Training Coordinator or assigned Lead.

Create Initial Project Folder (S: Drive) – Creation of a project folder within the S: Drive to hold all project materials and drafts of materials.

Initial Project Meeting – A meeting to discuss the project plans and timeline. The Leads will arrange and direct this meeting.

Identify Target Audience – Identification of the target audience for the delivery of training.

Methodology – Identification of methodology for delivery (e.g., Classroom, Webinar, etc.). Consider target audience and length of time for development when making this decision.

Identify Stakeholders - Identification of those individuals who have an interest in the project or who have decision-making authority for the outcome of the project (examples may include policy or Division staff).

Internal and External Impacts – Consideration for things that may affect a project during development. These may include unplanned issues that come up during development and/or issues to be aware of early in the development process (e.g., pending policy changes, changes in assignments that affect timelines, vacation time of team members, potential conflicting priorities).

Detailed outline – Develop a detailed outline for each section of the course. Define the content and activities that relate to each objective. Identify potential resources for each topic.

Review (Send to Training Coordinator and State Lead) – After the outline is finalized by the project team, it is sent to the Training Coordinator and State Lead for final review and sign-off. This may include a Policy Initiatives Advisor review.

Edits – Finalize the outline prior to development based on feedback from Training Coordinator, State Lead, and/or Policy Initiatives Advisor.

DEVELOPMENT

Content Collection – Collection of the content for the course. This includes **Research Existing/Prior Curriculum.** There may be existing relevant curriculum in prior courses. Material may be stored on the S: Drive. Before writing curriculum from scratch, search the S: Drive first (contact Mark or Lynda), and consult with other training staff.

Considerations – Identification of methodology for delivery, including any specifics necessary for delivering the training (i.e. classroom conducive to group activities, minimum of two trainers per session). These considerations should be included in the TN.

Initial Content Development/Narrative – The content to be included in the course based on the outline. Assign a date range and names to this step. It pulls together all the content from all project development team members. This will include all course materials similar to a final draft (PG, TN, PPT, activities, etc.).
Note: For a webinar or webcast, the content development may include: PG, TN, PPT, and interactions (polls, quizzes, scenarios, and any question that requires an answer).

Content/Narrative Review and Proofreading Review (PTT Internal 1) – This review is for PTT staff only. Proofreading review is for formatting, spelling and grammar. This step is to ensure that content is complete and only copy-ready materials are sent to external reviewers. All content (PG, TN, activities, supplementary materials, etc.) needs to be sent to reviewers by the due date. When appropriate, be specific on what you want that reviewer to focus on.

Edits – Updates to course materials based on input from review steps and/or stakeholders. Assign date range and names.

Review (Send to State Lead and/or Training Coordinator) – Send the content for final review and sign-off. The content at this point should be copy ready (proofread, grammatically correct, final) in the Word format.

Edits (**As needed)** – Edits to the content based on the State Lead and/or Training Coordinator review. If there are no edits at this time, the Project Lead will forward for External Review.

Review (External) – Review by policy and/or other subject matter experts. May include W-2 agency staff and/or other stakeholders. When appropriate, be specific on what you want that reviewer to focus on.

Edits – Updates to course materials based on input from review and/or stakeholders. Assign date range and names.

Evaluation – Development of the course evaluation. Development should coincide with materials development and be based on the learning objectives. Evaluations that go beyond “how much do you feel you learned” (i.e. Pre/Post tests) should be reviewed internally and externally with the course materials. Note that there is an evaluation template for Word available.

Review (PTT Internal 2) – This review should include the state lead. It should also include the proofreading review which includes formatting, spelling, and grammar. When appropriate, be specific on what you want that reviewer to focus on.

Final Draft Edits – Projects that don’t need a Dry Run, TtT, or Pilot may end here and proceed to the final review materials storage task.

Dry Run – Planning for a Dry Run of the course as needed. Assign date and names. Presentation of training plans/activities. Audience may include policy staff, other subject matter experts, trainers, and potential training audience. The size of the audience should be limited to a number that will allow the giving and receiving of feedback. The main goal is feedback, the focus is the curriculum. Definition: Presentation of the curriculum/material/plans/training process for the purpose of receiving feedback.

Technical Dry Run (Webinar or Webcast only) – Practice using the webinar tools (e.g., polling slides, whiteboard, Q&A, annotation tools) and polish skills for presenting course material via distance.

Edits – Any updates to the course materials based on input from the dry run.

Train the Trainer (TtT) – Planning for a Train the Trainer for the course as needed. Assign a date and names to this step. Be sure to invite agency approved trainers. How to train the course. Teach the content, do the activities. Practice. Focus is the trainer, audience is the trainers. Definition: Teaching trainers how to present the material.

Edits – Updates to the course materials based on input from TtT.

Pilot - Planning for a Pilot for the course as needed. Assign a date to this step. Presenting the entire program to “real” students. Someone from the development team needs to be there to see how the written document works, and if the flow and activities work as intended. Definition: Test Drive

Edits – Updates to the course materials based on input from the Pilot.

Final Review (PTT Internal 3) – This review should include the state lead. It should also include the proofreading review which includes formatting, spelling, and grammar. When appropriate, be specific on what you want that reviewer to focus on.

Final Edits/Materials Completion – The incorporation of comments from final editing review to finalize course materials. Assign a date range and names to this step.

Final Review (Send to Training Coordinator and/or State Lead) – Send the final content to the Training Coordinator and/or the State Lead for final review and sign-off. This may include a Policy Initiatives Advisor review. The content at this point should be copy-ready (proofread, grammatically correct, final).

Final Edits (**As Needed)** – Edits to the content based on the Training Coordinator, State Lead and/or Policy Initiatives Advisor review. If there are no edits at this time then the Training Coordinator will provide final approval.

Materials Storage – Confirm that all course materials are appropriately stored in S: Drive, published on the Trainers Resource page, and sent to Learning Center.

DELIVERY

Marketing Plan – Development of a plan for marketing a new course. This includes submission to the Training Times and any other marketing resources (examples include regional meetings, ATL meetings in Milwaukee, and/or emails to the ATL list).

Course Request Form – Completion of the Course Request Form by the state lead, submission to Learning Center staff, and verification that it is correctly entered in Learning Center.

Upload PG to LC Date – Publication date for upload documents to Learning Center (LC). This date defines the date the course material is available for the confirmation letters (classroom). Classroom materials should be sent to LC prior to the Enroll Close date.

Classroom or Webinar Delivery Dates – List delivery dates (or anticipated delivery date) and locations if known.

Class Request Forms – Complete and submit the Class Request Forms to Learning Center staff. Verify correct entry of all information in Learning Center. To be completed by the Project Lead or other designated person.

Review Evaluations – Review the evaluation data to determine improvements and success of course.

Identify ongoing support needs – Identify any ongoing support (examples include known upcoming changes to the materials and support of online learning).

NOTE: Evaluation Summary Process – Trainer(s) to send paper evaluations to CCDET/Renee for compiling. Project lead to assign this responsibility to one trainer when there is more than one trainer providing the training.