Training and Education Instructional Requirements Document Template

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FY09



Training and Education Instructional Requirements Document Template

# Introduction to the Template

The Training and Education Instructional Requirements document outlines the approach to the educational intervention outlined in the Business Requirements Document. The consultant, designer, analyst, trainer, or subject-matter expert must design requirements for the education and training intervention to ensure that, at its end, the goal of the educational program will be met and that participants return to their duties with enhanced knowledge, skills, and/or abilities (KSAs), as necessary. This document will be used by the Development and Implementation teams as input to their activities.

## How to Use this Template

There are 14 parts to this template, listed below, along with an extensive Appendix to guide further development.

Contents

[Introduction to the Template 2](#_Toc226454140)

[How to Use this Template 2](#_Toc226454141)

[Rationale 4](#_Toc226454142)

[Audience 4](#_Toc226454143)

[Course Research 4](#_Toc226454144)

[Design Timetable 5](#_Toc226454145)

[Project Overall Timeline 5](#_Toc226454146)

[Detailed Timeline: Design 5](#_Toc226454147)

[Detailed Timeline: Course Development 5](#_Toc226454148)

[Estimated Resources for Design and Development Phases 6](#_Toc226454149)

[Required Task Inventory to be Addressed by the Training 6](#_Toc226454150)

[Educational Objectives and Performance Measures 7](#_Toc226454151)

[Observable Behaviors (Pre- and Post-Training) 7](#_Toc226454152)

[Proposed Instructional Setting(s) 8](#_Toc226454153)

[Course Topics and Outline 8](#_Toc226454154)

[Course Duration and Schedule 9](#_Toc226454155)

[Instructional Methods 9](#_Toc226454156)

[Evaluation Methods 9](#_Toc226454157)

[Stakeholder Hand-Off: Design / Development Phase to Implementation Phase 10](#_Toc226454158)

[Appendix 11](#_Toc226454159)

[Choosing Instructional Methods 11](#_Toc226454160)

[Training Session Planner 13](#_Toc226454161)

[Training Session Scripting Worksheet\* 14](#_Toc226454162)

[Development Deliverables: PowerPoint Presentation Example 15](#_Toc226454163)

[Development Deliverables: Student and Instructor Lesson Examples 16](#_Toc226454164)

[Participant Lesson / Manual Example 1: Customer Service (Writing Exercises with Group Discussions) 16](#_Toc226454165)

[What is Customer Service? 16](#_Toc226454166)

[Exercise 1: Describing Customer Service 17](#_Toc226454167)

[Exercise 2: What Do You Know? 19](#_Toc226454168)

[Participant Lesson / Manual Example 2: Entering a Budget in ABCDEFG (Computer-Based Hands-On Exercises) 20](#_Toc226454169)

[Entering the Project Budget 20](#_Toc226454170)

[Participant Lesson / Manual Example 3: Legal Aspects of Construction (Case Study with Small and Large Group Discussion) 23](#_Toc226454171)

Filling out the template need not be a labor-intensive process. Although there are 14 sections, each one may only require a few sentences to complete. If a section was provided by the Business Requirements document, you can copy that information to this one (for example, the summary of the project goal, the audience, part of the timeline, and high-level task inventory sections), or merely refer back to it.

Instructions on how to use the template appear in italicized text, with examples in normal text. Simply delete the instructions and replace the examples with your own text. Don’t forget to:

* Modify the page header text to reflect the name of your project.
* Delete the paragraphs of instructions on this and the previous page, as well as any italicized instructions
* Delete the Appendix and its examples; you may wish to create your own appendix.
* Update the Table of Contents (just right click on it)

# Rationale

[This section provides the rationale for the need for a training intervention.]

In July 2011, this office will implement ABCDEFG, a new project management software application for all employees involved in managing projects. The ABCDEFG application is unfamiliar to all but the ABCDEFG project implementation team, and will require that the entire project management workforce be trained to use it. This document outlines the instructional requirements to bring staff up-to-speed with the new software and reduce productivity losses.

# Audience

[In this section, answer the questions What performance gap was identified? and What population requires this educational intervention?]

In July 2011, this office will implement ABCDEFG, the new project management software application for all employees involved in managing projects. The ABCDEFG application is unfamiliar to all but the ABCDEFG project team, and will require that the entire project management workforce be trained to use it, a total of 75 project managers and other staff.

The Design team must create educational plans for this audience to develop solutions, including training, job aids, and a web-based reference library, to ensure a smooth transition from the previous project management application to the new one.

# Course Research

*[In this section, make note of research completed in this phase on such topics as available off-the-shelf course materials, either from the vendor or third parties, and the relative cost. If possible, perform a compressed cost-benefit analysis to guide the project team in deciding whether to buy or develop the course in-house.]*

Vendor help documentation is available within the application and it is context sensitive.

There is only one book on the market, a self-study book which may provide reference materials for the development team, but the book is too long for instructional use. Some participants may wish to use it as a reference guide, after training. See References, below.

After calls to six training firms and three other institutions that have adopted the software, it was determined that instructor-led training materials are not commercially available. The other institutions developed their own institution-specific short courses only, rather than a comprehensive course.

Therefore, the instructor-led course must be developed in-house.

#### References

Jones, Joe. *Using ABCDEFG. The Complete Reference*. Indianapolis: QUE Publishing, 2008. 793 pp. with index. Self-study book with CD examples. Retail Cost: $49.95.

# Design Timetable

[Here provide a high-level schedule for the project. Detailed schedules are required for this phase, for the sake of the project team. An example timetable appears below.]

## Project Overall Timeline

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Phase** | **Q1 2010** | **Q2 2010** | **Q3 2010** | **Q4 2010** | **Q1 2011** | **Q2 2011** |
| **Analysis** |  |  |  |  |  |  |
| **Design** |  |  |  |  |  |  |
| **Development** |  |  |  |  |  |  |
| **Implementation** |  |  |  |  |  |  |
| **Evaluation** |  |  |  |  |  |  |

## Detailed Timeline: Design

|  |  |  |  |
| --- | --- | --- | --- |
| Phase Tasks, Milestones and/or Deliverables | Start Date | End Date | Responsible Role |
| Verify Requirements | 04/01/10 | 04/02/10 | Project Manager |
| Set Detailed Course Objectives | 04/05/10 | 04/10/10 | Instructional Designer |
| List Observable Behaviors (Pre- and Post-Training) | 04/05/10 | 04/10/10 | Instructional Designer |
| Develop Course Topics and Outline; Prepare High-Level Course Storyboard | 04/12/10 | 04/17/10 | Instructional Designer / Subject-Matter Expert |
| Select Instructional Methods | 04/19/10 | 04/23/10 | Instructional Designer |
| Perform Project Research (e.g., off-the-shelf courses, etc.); Prepare Research Report for Buy or Build Analysis | 04/12/10 | 04/23/10 | Analyst |
| Meet with Leadership for "Organizational Readiness"; Prepare Readiness Activities | 04/23/10 | 05/28/10 | Project Manager |
| Prepare for Development Phase; Complete Instructional Requirements Document | 06/01/10 | 06/30/10 | Project Manager |

## Detailed Timeline: Course Development

|  |  |  |  |
| --- | --- | --- | --- |
| Phase Tasks, Milestones and/or Deliverables | Start Date | End Date | Responsible Role |
| Verify Requirements | 07/01/10 | 07/02/10 | Project Manager |
| Review Detailed Course Objectives | 07/05/10 | 07/06/10 | Instructional Designer |
| Review Desired Observable Behaviors (Pre- and Post-Training) | 07/07/10 | 07/08/10 | Instructional Designer |
| Review Course Topics and Outline; Prepare Detailed Course Storyboard | 07/12/10 | 07/17/10 | Instructional Designer / Subject-Matter Expert |
| Develop Course Materials, Exercises, Job Aids, and other necessary training support materials (using Selected Instructional Methods) | 07/12/10 | 09/23/10 | Instructional Designer / Subject-Matter Expert |
| Pilot Course and Make Corrections | 09/23/10 | 10/28/10 | Subject-Matter Expert / Instructional Designer |

# Estimated Resources for Design and Development Phases

[*In this section list the resources and time estimate (percentage or effort in hours) to be devoted to Design. NOTE: Roles listed and estimates may vary, depending upon the project. The following table is an example only.*]

|  |  |  |  |
| --- | --- | --- | --- |
| ****Resources Required**** | | | |
| ****Human Resources**** | | | |
| **Role** | **Duration** | **Effort** | **Estimated Total** |
| Project manager/ Instructional designer | 3 months | 20 hours per week | 2080 |
| Administrative | 3 months | 8 hours per week | 832 |
| Content experts | 3months | 20 hours per week | 1440 |
| Graphic designer | 3 months | 40 hours per week | 480 |
| Writer/Editor | 3 months | 16 hours per week | 192 |
| Trainers | 3 months | 16hours per week | 192 |
| Total Human Resources |  |  | 5216 |
| ****Tools and Other Resources**** | | | |
| **Resource** | **Number / Amount** | **Unit Cost** | **Estimated Total** |
| System Access Permissions | 6 | 0 | 0 |
| Training Database | 1 | \* | - |
| Total Resources |  |  |  |

\*IT department estimates of costs for additional database already planned in the IT plan.

All resources requested are on staff and available. Technical requirements for the training database will be provided by the IT department.

# Required Task Inventory to be Addressed by the Training

[The task inventory details the flow of events that are executed in order to accomplish some business goal. Examples of a task inventory are such processes as how a support request gets escalated or defining how an account gets allocated for charges among multiple funds. In this section, list the high-level tasks that the learner must master. Task inventories help the instructional designer understand what must be taught so that s/he can make decisions about instructional methods.]

All project management tasks as implemented in the new software will need to be taught, including entering and managing:

* Basic project information
* Project Scope, Budget, Funding, and Schedule
* Vendor Contracts
* Contract Change Orders
* Contract Payments
* Project Deliverables and Deliverable Reviews
* Contract Closeout
* Project Closeout

# Educational Objectives and Performance Measures

[Educational objectives describe what the participant will know, apply, and be able to do when the training completes and/or when the participants are on the job as a result of the training event(s). Describe the goals of the training in terms of the performance measures that will demonstrate that the participants 1) know the material and 2) can use that material on-the-job as required.]

At the end of the educational session(s), depending upon role, participants should be able to:

* Enter and save basic project information
* Enter, save, and edit project scope, budget, and schedule
* Enter project contracts and payments
* Enter contract change orders
* Work with outside vendors to ensure high-quality deliverables
* Attach project deliverables
* Review and mark up project deliverables
* Close out project contracts
* Run project reports
* Enter individual project effort, as time recording toward the project
* Close out a project

Performance will be measured against successful completion of tasks with minimal (<3%) errors. Each task will be performed within a task-dependent timeframe(s), to be determined as the Design phase completes.

# Observable Behaviors (Pre- and Post-Training)

*[In this section, enter the observable behaviors participants should demonstrate prior to the training, if any. These are commonly referred to as ‘pre-requisite’ behaviors. Also describe the observable behaviors that participants should be able to demonstrate after they have completed the training. Please note that these behaviors may be the same as the course objectives. Depending upon the type of training, however, observable behaviors and performance measures for those behaviors, may differ slightly. For example, if the training is designed to help customer service representatives improve their interpersonal skills, a performance measure for such training (a post-training observable and measurable behavior) could be that customers score their interactions with the representative at an acceptable rating on a pre-determined scale.]*

Prior to training, all participants will have had experience with the previous project management system. They have performed all tasks successfully in the previous system. They have no prior experience with the ABCDEFG application. This new application offers nearly the same features as the old system, with the exception of project time recording.

The observable behaviors are listed in the course objectives. On the job and back at their desks, participants are expected to perform the stated tasks with minimal errors (<3%) as observed by their supervisors and reported on performance appraisals. Timeliness is outside the scope of this course, since individual units determine the measures for timeliness.

# Proposed Instructional Setting(s)

[Instructional settings vary depending upon the educational goal. Note the desired instructional setting set out by a project sponsor, project manager, or suggested by the need itself. The desired setting may be altered if instructional methods are selected that require a different venue.]

Because the training events require hands-on experience with the software, the instructional setting should include computer workstations and instructor-led in classroom training, rather than computer-based self-study. However, job aids and a web-based reference library will provide support to the workforce after classroom training has completed. In addition, three individuals will provide first-line support within the project management workforce. Those individuals will be provided in-depth training.

# Course Topics and Outline

*[In this section, provide the topical outline for the course to be developed in the sequence recommended for development. If a storyboard will be used, it will be developed in the next phase.]*

1. Entering basic project information
2. Adding and Editing Project:
   1. Scope
   2. Budget
   3. Funding
   4. Schedule
3. Recording Vendor Contracts
4. Working with Contract Change Orders
5. Recording Contract Payments
6. Working with Project Deliverables and Deliverable Reviews
7. Completing Contract Closeout
8. Completing Project Closeout

# Course Duration and Schedule

*[In this section, give the anticipated length of the course, including the number of sessions if the course will be broken up.]*

Duration. One Day (7 hours)

Schedule. Morning: Topics 1-4; Afternoon: Topics 5-8.

# Instructional Methods

*[Provide the types of instruction which have been determined to be most conducive to learning the material. To select instructional methods, see* Appendix*.]*

The primary instructional method will be instructor lecture and demonstration within the system, immediately followed by participant practice exercises. An instructor packet will be developed.

Students will assess their progress through the exercises and the instructor will provide feedback through question-answer sessions after each exercise. Students will be paired to provide recall enhancement. A student manual will be developed, with exercises and exercise keys where appropriate.

A mid-course self-graded quiz will allow students to review material already learned, and ask questions prior to the second section of the course.

# Evaluation Methods

*[Here provide a list of evaluation methods to be used, with their levels.]*

Level 1. Pre-course readiness activities will provide participants with an understanding of what they will learn and the benefits to them of training. Supervisors will be provided with pre-course assessment tools so that they may make assessments of the current state of knowledge and of transfer to the job later in the evaluation period. A post-course evaluation will assess participant satisfaction immediately upon completion of the course.

Level 2. Optional inter-course quizzes may assess progress during the course. Alternatively, a one-hour task-based examination could provide Level 2 evaluation.

Level 3. A short telephone survey of supervisors at two- and four-weeks after training will provide an assessment of learning transfer to the job.

# Stakeholder Hand-Off: Design / Development Phase to Implementation Phase

[Here, provide signature(s) for project sponsor(s) and other relevant stakeholders. This is a kill-point for a project. If stakeholders cannot agree, the project may be stalled until decisions are made, such as the buy or develop decision mentioned above. Signatures mean that the project is ready to move forward to the next phase, either Development or Implementation, depending upon decisions made.]

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Sponsor Project Manager / Planner / Designer

# Appendix

## Choosing Instructional Methods

|  |  |  |
| --- | --- | --- |
| Method | Purpose | Rationale |
| Case Studies | Allow participants to discover certain learning points themselves | To apply new knowledge to a specific situation  To practice problem-solving skills |
| Games | Provide non-threatening way to present or review course material | To help grasp total program content  To present dry material in an interesting way  To add a competitive element to the session |
| Survey Instruments | Provide feedback; self-assessment | To identify areas for improvement  To establish a baseline for future growth |
| Lectures | Convey information when interaction or discussion is not desired or is not possible | To convey information quickly within a short time  To communicate the same information to large numbers of people  To provide basic information to a group that is not knowledgeable |
| Mental Imagery  Exercises | Help participants increase understanding, gain insight | To address affective learning  To stimulate thinking, imagination  To replace role playing |
| Observations | Certain participants act out or demonstrate behaviors, tasks, or situations while others observe and give feedback | To show the group how to perform a procedure or apply a skill or behavior  To increase participants’ observation, critiquing, and feedback skills  To demonstrate behavior modeling |
| Role Plays | Help participants practice skills used in interactions | To practice newly acquired skill  To experience what a particular situation feels like  To provide feedback to participants about their behavior |
| Simulations | Recreate a process, event, or set of circumstances, usually complex, so that participants can experience and manipulate the situation without risk and then analyze what happened | To integrate and apply a complex set of skills  To elicit participants’ natural tendencies and provide feedback on those tendencies  To provide a realistic, job-related experience |
| Small Group  Discussions | Offer opportunities for participants to express opinions, share ideas, solve problems, interact with others | To generate ideas  To find out what participants think about a particular subject  To increase level of participation  To encourage group interaction and build group cohesiveness |
| Task Exercises  or Activities | Allow participants to work with the content in small groups | To practice and test participants’ understanding of a concept or process  To promote group collaboration  To increase participants’ confidence in their ability to apply learning on the job |
| Writing Tasks | Help participants reflect on their understanding of concepts, information, ideas | To provide for individual input |

Adapted from: Lawson, Karen. *The Trainer’s Handbook*. 2nd Ed. San Francisco: Pfeiffer, 2006-2008.

## Training Session Planner

|  |
| --- |
| Rationale: |
| Objectives: |
| Materials and Activities: |
| Evaluation: |
| Feedback and Corrections: |

## Training Session Scripting Worksheet\*

|  |  |  |  |
| --- | --- | --- | --- |
| Lesson/Module |  | | |
| Audience |  | | |
| Duration |  | | |
| Objective(s) |  | | |
| Do | **Say** | **Show / Resource / Activity** | **Time** |
|  |  |  |  |

\*Note: This Worksheet may be reproduced for each lesson.

# Development Deliverables: PowerPoint Presentation Example



A set of slides to accompany this sample is included as a separate document. Slides can be presented as an instructor aid, a web-based presentation, or a student aid as part of student materials. (See embedded slide in example, below.)

# Development Deliverables: Student and Instructor Lesson Examples

## Participant Lesson / Manual Example 1: Customer Service (Writing Exercises with Group Discussions)

### What is Customer Service?

**Lead-In**

What’s the difference between assessment and evaluation?



**Instructor Notes:**

Distinguish assessment from evaluation.

Lesson Objective

The objective of this lesson is to have you reflect on your own definitions of customer service and its importance and define customer service as it applies to your unit.

Dictionary Definitions

* Customer service: assistance and other resources that a company provides to the people who buy or use its products or services
* **Customer service** is a series of activities designed to enhance the level of customer satisfaction – that is, the feeling that a product or service has met the customer expectation.

Why give quality service?

Providing quality service seems like “the right thing to do”. But did you know that retaining satisfied customers gives your organization a much higher return on investment than gaining new customers or cutting costs?

In one study by Frederick Reichheld of Bain and Company and W. Earl Sasser, Jr., of Harvard Business School customer retention had a significant advantage over cutting costs. For each dollar of costs cut, customer retention actually returned five dollars in revenues. Just by providing excellent customer service, high-rated companies gained three times more market share and an overall 12% higher return on sales.[[1]](#footnote-2) And it costs five times as much to win a new customer as it does to retain one you already have.[[2]](#footnote-3)

**Instructor Notes:**

Prepare students for the upcoming exercises.

### Exercise 1: Describing Customer Service

*Please take a moment to describe…*

* 1. One of the worst customer service experiences I ever had was…

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* 1. My best customer service experience was…

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* 1. An example of IT customer service I’ve experienced was…

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* 1. When I need help with something I don’t understand, I typically…

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##### Discussion

What would you describe as the top three things you must have to experience adequate customer service in each of the following:

A restaurant

A retail store (think, Best Buy)

A bank

### Exercise 2: What Do You Know?

Imagine you have just been promoted to Director of a unit just like the one you work in, but that is cost-recovery, and you are responsible for ensuring your unit’s services continue to have value to those you serve. You may select which area of service you will focus on, but keep it within a set of skills you know well. Examples might be programming, answering the telephone, providing help with purchases, and so forth.

How do you want your direct reports to behave in order to provide excellent customer service to the individuals you serve? List at least 3 specific customer-related behaviors that your direct reports must exhibit when they encounter those they serve.

You have only five minutes in which to accomplish this task. When the exercise is complete, we will discuss your answers as a group.

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##### Discussion:

What was difficult about this situation? What was easy? Why?

## Participant Lesson / Manual Example 2: Entering a Budget in ABCDEFG (Computer-Based Hands-On Exercises)

### Entering the Project Budget

|  |  |
| --- | --- |
| Task Objective: | The Budget template allows a Project Manager to enter preliminary, high-level budget information into ABCDEFG in order to track initial broad estimates by category and to enter detailed budget information as the project progresses. The Project Manager can then refine the budget as the project matures, adding more specific budget codes and moving lump sums into appropriate sub-categories or forecasting what-if scenarios as desired. |
| When to Do It: | The Budget may be created prior to project approval, once preliminary high-level estimates for project categories have been determined. It may also be entered once project approval has been received. Budgets will be versioned relative to major milestones, such as initial entry, project approval, architect’s final estimate, and for budget revisions and/or schedule revisions. See Appendix A: Glossary for definitions of budget versions. |
| Primary Responsibility: | Project Manager |
| Security: | The following ABCDEFG roles may perform this task:  Project Manager  Project Assistant  Director  Director Assistant |
| Before You Start: | Have budget numbers available prior to budget creation. At the earliest stages of the project, you may only have lump sum numbers. You may enter these and refine the budget as the project becomes more defined.  You may enter budget numbers without project funding prior to project approval. |
| Helpful Information | You may wish to review the budget codes in *Appendix B: Budget Codes and Descriptors*, to familiarize yourself with the coding structure of budgets in ABCDEFG. |

⮚NOTE: To learn more about budgeting among projects which have Master and Sub-Project relationships, see that topic later in this manual.

#### To Create the Summary-Level Budget:

1. Using the **Go To**… drop-down menu, select Project Budget.  
   The Project Budget template appears, as illustrated above.
2. To enter lump sums, click on the **Edit Budget** button.  
   The screen refreshes, and the Edit Budget screen appears.
3. Next to the **Edit Budget at Level** radio buttons, ensure that the radio button next to Summary is selected.
4. Double-click on the zeros in the **Proposed Budget** field.
5. Type the first summary high level budget number.
6. Tab to the **Forecasted Amount** field, and then to the **Future Contracts** field.

The amount you entered into the Proposed Budget field is automatically entered into each of these two fields.

1. Continue tabbing to the next **Proposed Budget** field and enter the amount for each relevant budget line.
2. Click the **Save Changes** button. button_Save_Changes

#### To Create a Detailed Budget:

1. Using the Go To… drop-down menu, select **Project Budget**.  
   The Project Budget template appears, as illustrated above.
2. To add all the standard project budget codes, click the **Add Standard Budget Codes** button.button_Add_Standard_Budget_Codes

The Standard Budget Codes are added to the budget.

1. To add individual and/or additional budget codes and lines, click on the **Add Budget Codes** button.button_Add_Budget_Codes

The Select Budget Codes to Add form opens.

1. Click in the checkbox next to each budget code you wish to add.
2. When you have completed your selections, click the **Add Selected Budget Codes** button.button_Add_Selected_Budget_Codes

The budget template returns, with the selected budget codes added.

1. To edit the budget, scroll down the budget template and click on the **Edit Budget** button.

The Edit Budget page opens.

1. Enter budget amounts at the Summary level, if you wish, by entering lump sums into each high-level budget category.

⮚NOTE: Notice that as you add amounts to the budget categories, the amounts in the Grand Total and Unallocated Funds fields at the bottom of the page automatically calculate for you.

1. At the top of the page, in the Edit Budget at Level area, as illustrated below,  
     
   3-Edit-Budget-Level  
     
   click in the radio button next to **Detailed**.

The page refreshes.

⮚NOTE: You will notice that the amounts listed under the summary-level budget categories are grayed out. You cannot edit summary-level budget codes when you have selected to edit the budget at the Detailed level. However, as you enter amounts into the detailed code fields, those amounts will be deducted from the high-level amounts automatically.

1. Enter a proposed budget amount into a detailed code proposed budget amount field.
2. Tab to the next field.

⮚NOTE: Notice that the Proposed Budget is copied into Forecasted Amount and the Future Contracts fields. If you edit the Proposed Budget field, the Forecasted Amount and the Future Contracts fields will not auto-populate again. This feature allows you to imagine different budget scenarios. Only amounts entered into the Proposed Budget field will appear on reports. The Forecasted Amount column is primarily for use as a “what if” tool.

1. Continue entering budget amounts.
2. When you have completed your work, click on the **Save Changes** button. button_Save_Changes

#### Exercise 1: Entering the Project Budget

Using the Budget example at the end of this lesson, enter a budget for your project at both the Summary and Detailed levels.

## Participant Lesson / Manual Example 3: Legal Aspects of Construction (Case Study with Small and Large Group Discussion)

Kent “Flounder” Dorfman is a project manager at Faber College. He is currently working on a major sports facility renovation being paid largely from donor funds, returns from lunch to find a voicemail from the general contractor on the job, Doug Neidermeyer. “Hello, Flounder,” says Neidermeyer. “Just wanted to let you know that one of my subcontractors was busting up that ground on the north end of the project when he turned up what looks like an old skeleton and some old looking pottery and other junk like that. The donor for the project wandered by at about that time and he and I both told the sub to dump the stuff right back into the ground and cover it up immediately. The namby-pamby architect tried to stop us but we ignored him. He might call you but just don’t take the call. Nobody will ever know, so no harm done.” The architect never calls.

1. What are the legal implications of Niedermeyer’s actions?
2. What should Dorfman do in response to the situation?
3. Are there alternatives to your recommendations? If so, what are they?
4. What law(s) govern Dorfman’s potential choices?

Discuss your responses with your group.

Select a spokesperson, and when asked, be prepared to explain your small group’s answers to the large group.

1. Thomas K. Connellan and Ron Zemke, *Sustaining Knock Your Socks Off Service*, New York: Amacom, 1993, p. 5. [↑](#footnote-ref-2)
2. Ibid., p. 11-12. [↑](#footnote-ref-3)