

Appendix



APPENDIX

In parallel with the development of the *Multimedia Pathways* manual, Impart has produced an initial set of some 35 templates for the key Work Products which form the supporting documentation framework of the methodology. The Work Products Templates have been designed for use by key members of a project team over the life of a project. Formatted in Microsoft Word these templates come with extensive descriptors to assist in their use. They are ready for immediate use within projects.

The *Multimedia Pathways* Work Product Templates are listed and described in this Appendix within the framework of the six phases of multimedia development – Initiation, Specification, Design, Production, Review and Evaluation, and Delivery and Implementation. They are listed alphabetically within the phase where they are most appropriately introduced into a project. Three example templates are also included

The Work Product Templates are currently available for purchase on CD ROM. They will also become available as downloadable files from the Impart web site, <http://www.impart.com.au>.

The complete set of the current Multimedia Pathways Work Product Templates on CD ROM is available as a single user licence. Returning a completed Registration Form that comes with the CDROM will entitle the single user to updates and additional templates as they become available.

Prices for multi-user licences are available on request.

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Appendix

Template Descriptions

INITIATION

Client Brief

A Client Brief document outlines the process of gathering information from a client by the development team to respond to a request by making recommendations about how to solve a problem.

Configuration Management Plan

The Configuration Management (CM) Plan outlines the policies and methods to be used during the life cycle for the project, and may be updated and improved as necessary as work proceeds. Effective CM procedures can contribute to project success by identifying and controlling parts (files) and components, and reporting their legal status.

This Configuration Management Plan is adapted from MILSTD-498 Distribution Statement A; Approved for public release; distribution is unlimited.

Development Activity Log

The Development Activity Log provides a way for project managers and team members to keep records of the amount of time spent working on a project and to assign that time to specific projects and activities. The Development Activity Log provides valuable information for any type of cost

effectiveness evaluation which might be conducted by the client or the development team.

Evaluation Matrix

Although by all appearances, the “Evaluation Matrix” is a very simple tool, it has a powerful purpose. It helps you to consider a wider range of data collection methods than you might otherwise consider in relation to each of the questions addressed by your evaluation. Evaluators sometimes get into the habit of using one or other data collection method, eg, an end-of-training questionnaire, without considering the advantages of alternative methods. This tool prompts you to consider each evaluation question and to decide which of the many data collection options have the greatest potential for providing the desired information.

This template is based on a document developed by Professor Tom Reeves, University of Georgia, USA, for which Impart has been granted a licence for “non-exclusive use and ability to modify and use those materials”.

Feasibility Study

The Feasibility Study identifies and documents the information creation and/or management needs of an organisation for specified interactive multimedia applications (eg training, job-aids, marketing). The study should also contain costed

strategies that can be followed to implement interactive multimedia products and systems within a specific organisation to meet the identified client requirements.

Project Diary

Interactive multimedia design projects of any size or scope are usually very complex, and therefore demand the coordination of many different types of people working together. Record keeping is an essential task of the project manager. It is a sound strategy to maintain a “Project Diary” throughout a multimedia design effort. This document outlines the major components of a “Project Diary,” and provides a rationale for the inclusion of the various sections.

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Project Estimate Work Sheet

This Project Estimation Worksheet will provide you with some guidance for calculating the temporal, financial, and personnel resources required for an interactive multimedia design project.

This template is based on a document developed by Professor Tom Reeves, University of

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Template Descriptions

Georgia, USA, for which Impart has been granted a licence for “non-exclusive use and ability to modify and use those materials”.

Quality Plan

This plan documents the procedures and techniques that are designed to ensure the production of a quality product, and outlines the roles and responsibilities of the team members relevant to these procedures. This template is designed to ensure that the activities of the multimedia project in relation to quality control, assurance and management are consistent with the requirements of ISO 9001:1994, Quality systems – Model for quality assurance in design, development, production, installation and servicing.

Request for Proposal

The Request for Proposal is prepared by the potential acquirer of a multimedia system. A clear and easily understood RFP, based on this template, will make the task of monitoring and controlling the acquisition and development of the multimedia system far simpler.

This template is based on a document developed by Professor Tom Reeves, University of Georgia, USA, for which Impart has been granted a licence for “non-exclusive use and ability to modify and use those materials”.

Scope Statement

This document outlines the roles and responsibilities of the project, for example, the functions, features and project deliverables. The document should also list all exclusions, some of which may be included at a later stage, once an impact assessment of such changes has been made.

Verification and Validation Plan

The Verification and Validation Plan documents what the minimum V&V tasks are to be for the multimedia project, and how these tasks are to be carried out.. The plan describes the review techniques to be used in each phase; details the procedures for each review; and prescribes corrective action to be taken regarding any problems found at the review. The level of formal verification and validation depends on the criticality of the multimedia system being developed.

This Verification and Validation Plan conforms to ANSI/IEEE Standard 1012-1986, Software Verification and Validation Plans.

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Template Descriptions

SPECIFICATION PHASE

Evaluation Plan

The Evaluation Plan Template tool includes the major topics that should be included in a reliable and valid evaluation plan. The Evaluation Plan details the methods for collecting data, the composition of the sample(s) and the evaluation instruments to be used.

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Multimedia Risk Management Plan

The risk management plan documents the procedures that will be used to manage risk throughout the project. In addition to documenting the results of the risk identification and risk quantification processes, it covers who is responsible for managing various areas of risk, how the initial identification and quantification outputs will be maintained, how contingency plans will be implemented, and how reserves will be allocated.

Needs Assessment

A Needs Assessment document outlines the process of gathering information for a development team to respond to a request by making recommendations about how to solve a problem. A Needs Assessment document may also determine the requirements of the target audience and the relationship with the content and tasks, which may need to be performed.

Needs Assessment Matrix

The “Needs Assessment Matrix” is a simple tool that suggests different ways of gathering information regarding audiences, tasks, and content while conducting a needs assessment for an interactive multimedia development project. The easiest way of obtaining needs assessment information is to interview people, but interviews have limitations as well. The ideal procedure is to “triangulate” the information you need by collecting it via two or more ways! This template is based on a document developed by Professor Tom Reeves, University of Georgia, USA, for which Impart has been granted a licence for “non-exclusive use and ability to modify and use those materials”.

Quality Agreement

This document provides a simple vehicle for specifying the quality requirements for the project. It provides a stakeholders’ view of product quality on the project.

Sign-off Form

The “Sign-Off Form” is an exceptionally useful project management tool, especially when working for an external client. Getting the client to sign-off on every interim product in the development of an interactive multimedia project will provide you with a solid basis for asking for additional resources (time, money or people) that may be needed when the client wishes to change the program at some later date in the project.

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Appendix

Template Descriptions

DESIGN

Change Request Form

Use this form to request a change to a baselined product. The completed form should be sent to the Project Manager. Documented requests for change should cover all documents that have been placed under formal controls.

This Change Request Form is based on a form published in AS 3563.2 Software Quality Management Standard now superseded by ISO 9000.3.

Design Statement

A detailed Design Statement is the blueprint for the development of the product and should describe the project in detail. The design statement is developed from the client brief, or the request for proposal document following a needs assessment. The costing, time line and prototype should all be able to be developed from this document.

Multimedia Project Plan

The Project Plan is a formal, approved document used to guide both project execution and project control. The primary uses of the project plan are to document planning assumptions and decisions, to facilitate communication among stakeholders, and to document approved scope, cost, and schedule

baselines. A project plan may be summary or detailed. The primary requirement in the project plan is a structured approach to planning, with consistently applied principles. The emphasis should be on a logical and well thought out overall approach.

This Multimedia Project Plan is adapted from MILSTD-498 Distribution Statement A; Approved for public release; distribution is unlimited.

Risk Factor Memorandum

Unresolved risk factors influencing the multimedia project may be recorded in this memorandum. It identifies the Project, the risk factor and its potential impact, and what minimisation strategies have been put in place. Contingency plans in the event that the risk is realised are documented.

Test Case Specification

The purpose of the Test Case Specification is to define a test case identified by a test design specification. There will normally be several test cases (and specifications) associated with each test design. A test case specification can be expressed very briefly, and it may be possible - for some designs - to document several test cases on a single page.

This Test Case Specification conforms to ANSI/IEEE Standard 829-1983, IEEE Standards for software test documentation.

Test Design Specification

The purpose of the Test Design Specification is to specify the requirements of the test approach and to identify the features to be tested by this design and its associated tests. It is possible for there to be several different test designs involved in testing a single multimedia product. Each test design will normally be associated with the testing of one feature of the system.

This Test Design Specification conforms to ANSI/IEEE Standard 829-1983, IEEE Standards for software test documentation.

Test Plan

The purpose of the Test Plan is to document the approach to be used for testing the multimedia product at the different stages of its development. It is normal for there to be a hierarchy of test documents covering the different stages of testing; thus, there might be an Integration Test Plan (with associated documentation); a System Test Plan (with associated documentation); and a Customer Acceptance Test Plan (again with associated documentation). The basic principles and contents of each set of documents is the same.

This Test Plan conforms to ANSI/IEEE Standard 829-1983, IEEE Standards for software test documentation.

Appendix

Template Descriptions

Test Procedure Specification

The purpose of the Test Procedure Specification is to specify the steps for executing a set of test cases or, more generally, the steps used to analyse a software item in order to evaluate a set of features. A test procedure specification may include descriptions of how to establish specific environmental requirements for a set of test cases - e.g. loading a specific test database.

This Test Procedure Specification conforms to ANSI/IEEE Standard 829-1983, IEEE Standards for software test documentation.

Traceability Matrix

The Traceability Matrix enables the requirements to be traced to their final implementation, identifying at each stage the product components, modules and units and their contribution to each of the requirements. The Traceability Matrix provides a powerful validation tool; requirements with no annotations have most probably not been met, while modules with no confirmed requirements are of doubtful purpose.

Appendix

Template Descriptions

PRODUCTION

Corrective Action Log

The purpose of the Corrective Action Log is to record and track the assignment of problem reports for action. Normally there will be two logs maintained - one for corrections to the product, and one for corrections to procedures, policies or standards. The log identifies the initial problem, issue, or defect, and the owner for the completion of the defined action is recorded. A series of actions to fix the problem are identified, and the open date and target closure date are recorded. A status indicator is used to aid exception reporting.

Project Status Report

The "Project Status Report" is prepared at regular intervals, usually once a week, to keep the client and team informed as to the progress (or lack thereof) with respect to the project. Milestones, costs, resource usage, time, and quality status are compared against the Project Plan. Changes to risk status and strategies are identified. This template is based on a document developed by Professor Tom Reeves, University of Georgia, USA, for which Impart has been granted a licence for "non-exclusive use and ability to modify and use those materials".

Prototype Evaluation Report

The User Testing and Evaluation Report includes a summary of the key findings and recommendations, details of the evaluation protocols used and data to support the conclusions drawn. The evaluation protocols should be agreed to by the client to ensure full coverage of the client's expectations of the evaluation process. The report will include specific user issues and concerns by category of user and a review of the findings from each evaluation protocol used. The report would be confidential and become the property of the client. Confidentiality agreements with the evaluation team should be in place.

Test Incident Report

The purpose of a Test Incident Report is to document any event that occurs during the testing process, which requires investigation. The Problem Resolution procedure defined in the Quality Plan should document the manner in which any Test Incident Reports are to be treated.

The Test Incident Report conforms to ANSI/IEEE Standard 829-1983, IEEE Standards for software test documentation.

Test Item Transmittal Report

The purpose of a Test Item Transmittal Report is to identify the test items being transmitted for testing. This report basically serves the purpose of a "cover sheet" confirming that the item to be tested is ready for testing, and documents the hand over from programmer to the testing team. In some environments, a Test Item Transmittal Report may be generated automatically by the Configuration Management System. The Test Item Transmittal Report conforms to ANSI/IEEE Standard 829-1983, IEEE Standards for software test documentation.

Test Log

The purpose of the Test Log is to provide a chronological record of relevant details about the execution of tests. A test log is usually in the form of a diary or log book. Test logs should demonstrate that all defined test cases have been performed.

This Test Log conforms to ANSI/IEEE Standard 829-1983, IEEE Standards for software test documentation.

REVIEW & EVALUATION

User Register (HTML DOCUMENT)

The User Register invites customers to provide information about themselves and their opinion of the product. It can also provide:

- names for a mailing list for upgrade notices for other product announcements and for specific technical support

- feedback on the success of various distribution channels

- identification of market segments different from the ones currently targeted.

IMPLEMENTATION & DELIVERY

Configuration Status Report

Use this report to record status of a baselined product. The completed form should be sent to the Project Manager.

Release Notes

The Release Notes describe any enhancements or changes to User Guide for this particular release. The Notes may also provide the client with details of the system and requirements in addition to copyright and license information; Technical support information; backup and recovery details and all known open problems, faults and warnings.

Test Summary Report

The purpose of the Test Summary Report is to summarise the results of the designated testing activities and to provide evaluations based on these results. The Summary Report should provide advice on the release readiness of the product, and should document any known anomalies or shortcomings in the product.

This Test Summary Report conforms to ANSI/IEEE Standard 829-1983, IEEE Standards for software test documentation.

<Project Title>

Project Diary/Filing System

<Interactive multimedia design projects of any size or scope are usually very complex, and therefore demand the coordination of many different types of people working together. Record keeping is an essential task of the project manager. It is a sound strategy to maintain a "Project Diary" throughout a multimedia design effort. This document outlines the major components of a "Project Diary," and provides a rationale for the inclusion of the various sections.

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Preface

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1.0 Contents of a Project Diary

<A “Project Diary/Filing System” should contain the following sections:

- *Planning records, for example*
 - ⇒ *a copy of the proposal for the project if one was written*
 - ⇒ *a copy of the project contractual agreement if one exists*
 - ⇒ *a time line or PERT chart for the project*
 - ⇒ *copies of vendor contracts for subcontracted work*
 - ⇒ *a project team organisational chart or roster*
- *Progress records*
 - ⇒ *copies of development activity logs from project team members*
- *Correspondence file*
 - ⇒ *copies of correspondence related to the project*
- *Financial records*
 - ⇒ *a project budget*
 - ⇒ *receipts for expenses and copies of invoices related to the project*
- *Customer deliverables*
 - ⇒ *copies of the project status reports issued weekly or at other intervals*
 - ⇒ *copies of sign-off forms used to obtain client sign-off on major milestones*
- *Technical reports*
- *Quality Assurance records*
 - ⇒ *Standards*
 - ⇒ *Change Control*
 - ⇒ *Evaluation*
 - ⇒ *Testing*
- *Copies of any other documents related to the personnel, budget, or schedule of the project.>*

2.0 Storage of project documents

<The Project Diary should be maintained in either a filing cabinet with folders appropriately labelled or in a three ring binder. This will depend on the size and complexity of the project.>

3.0 Project diary overview

3.1 Planning records

3.1.1 Project proposal

<The funding for most interactive multimedia projects is obtained when companies compete via a Request for Proposals (RFP) process. Suppose a corporation wants to have an interactive multimedia (IMM) information system developed for use by its employees to help them better understand the options they have for retirement plans, health benefits, etc. The corporation could ask its own internal Human Resources Development (HRD) department to develop the interactive information system, but because the HRD department has never produced such a program before, the corporation decides to release an RFP in search of a contractor to develop a prototype IMM system. Several multimedia development companies compete for the contract by writing proposals. In the best of circumstances, the winning proposal is selected because it represents the best balance of quality, originality, and cost-effectiveness. A copy of the proposal should definitely be part of any Project Diary.>

3.1.2 Project contract

<Usually, after winning a RFP competition, a formal contract is written that describes the “deliverables” for a project such as a CD-ROM with the prototype IMM system pressed on it, installation instructions and maintenance guidelines. The contract may also include the budget and time line for the project including any interim deliverables (e.g., a script), major milestones, payment schedule, and so forth. Obviously, such a contract is an important part of a Project Diary.>

3.1.3 Schedules

<In addition to any schedules or time lines included in the project contract, the project manager may also develop internal time lines or charts to help keep track of the schedule of the project and major accomplishments. Project management software such as MacProject II or Microsoft Project can be very useful in this area. These programs can be used to develop PERT charts that help plan, track, and manage the progress of a project.>

3.1.4 Vendor contracts

<It is rare that a project team will have every type of expertise and experience needed to construct an interactive multimedia project, and so often times it is necessary to contract others (called vendors) for special services such as video editing. Also, even if you do have the internal expertise, it is sometimes less expensive to contract out certain aspects of a large scale development project. Copies of vendor contracts for subcontracted work are important elements of a Project Diary.>

3.1.5 Organisational chart

<An organisational chart or roster describing the team members assembled for the project and indicating their inter-relationships may be useful, especially in large scale projects in which personnel may not know the roles and responsibilities assigned to others. Whatever kind of chart or roster is used, a copy should be in the Project Diary.>

3.2 Progress records

3.2.1 Development activity logs

<Development activity logs should be maintained by all project team members and tabulated by the project evaluator or manager. Time data will be invaluable in accounting for the resources used in completing this project. It may be even more useful in planning for the next project. Copies of this data should be included in the Project Diary.>

3.3 Correspondence file

3.3.1 Correspondence

<It is a good practice to keep copies of any correspondence (e.g., letters or internal memos) related to the project in the Project Diary.>

3.4 Financial records

3.4.1 Financial tracking

<In addition to the budgetary information in the project contract, a manager will usually maintain spreadsheets that help plan, track, and manage the financial resources of a development project. Spreadsheet programs are available in integrated software packages such as ClarisWorks, or a specific spreadsheet program such as Microsoft Excel may be used. Copies of financial spreadsheets should be kept in the Project Diary.>

3.4.2 Receipts and expenditure

<Copies of receipts for expenses and invoices for services should be maintained in the Project Diary.>

3.5 Customer deliverables

3.5.1 Project status reports

<Project status reports should be issued at weekly intervals or on the occasion of the completion of some major milestone. Copies of your status report should be maintained in the Project Diary. >

3.5.2 Client sign-off forms

<Obtaining client sign-off on major milestones of a project is an important function of the manager. Copies of sign-off forms should be kept in the Project Diary.>

3.6 Technical reports

<These reports may take a number of forms, e.g. they may relate specifically to a segment of code, to video/graphic/animation compression issues or to issues relating to the client's requirements and the delivery platform.>

3.7 Quality assurance records

3.7.1 Standards

<Standards are written agreements which contain technical specifications or other precise criteria to be used consistently as rules, guidelines or definitions of characteristics to ensure that materials, products and processes will consistently do the job for which they are intended. Standards may include:

- Dimensional standards that define the size, shape, volume, frequency etc of an entity, e.g. all graphics will be 320x240 pixels and 16 bit colour, uncompressed.*
- Standards for quality and purpose, e.g., defining the level of performance to be expected*
- Standards which define test methods*
- Standards which establish codes of practice, which define how things should be done, to ensure safety, reliability and conformity.>*

3.7.2 Change Control

<Copies of all change request forms should be filed in order to ensure that product changes requested by the client or deemed necessary by the developer are agreed. Procedures for 'signing off' on changes should be communicated to the client at the outset of the project.>

3.7.3 Evaluation

<Records may include the initial analysis and formative and summative evaluation undertaken during the design, production and implementation phases.>

3.7.4 Testing

<Documentation arising out of testing activities should be filed and cross-referenced with the appropriate Plans, e.g. the Quality and Test Plans.>

3.8 Any other documents

<Copies of any other documents related to the personnel, budget, or schedule of the project should be included in the Project Diary.>

<Project Title>

Multimedia Risk Management Plan

< The risk management plan documents the procedures that will be used to manage risk throughout the project. In addition to documenting the results of the risk identification and risk quantification processes, it covers who is responsible for managing various areas of risk, how the initial identification and quantification outputs will be maintained, how contingency plans will be implemented, and how reserves will be allocated.>

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1.0 Introduction

1.1 Scope and purpose of document

<This paragraph shall summarise the purpose and contents of this document and shall describe any security or privacy considerations associated with its use.>

1.2 Overview of major risks

<This paragraph shall briefly state the major risks for the project.>

1.3 Responsibilities

<This paragraph shall identify the owner of the major risks to the project. This usually rests with the Project Manager, but on larger projects, it may be the responsibility of the Sponsor, or “Project Steering Committee”.>

2.0 Project Risk Table

<This section contains information used to create the Risk Table, and the values used for the risk management planning. A sample table is shown below.>

Risk Item	Category	Probability	Impact	Reference
size estimates too low	PS	60%	2	
funding will be lost	CU	40%	1	
technology will not meet expectations	TE	30%	1	
high staff turnover	ST	60%	2	

Where:

Category is the risk category based on:

- Product size* PS
- Business impact* BU
- Customer characteristics* CU
- Process definition* PR
- Development environment* DE
- Technology* TE

-
- *Staff size and experience* *ST*

Impact indicates the likely effect on the project and the resulting product:

- *catastrophic (show-stopper)* *1*
- *critical (delay, extra cost)* *2*
- *marginal (extra effort)* *3*
- *negligible (internal effort)* *4*

Probability is the current estimate of the likelihood of occurrence

Reference indicates the risk item number detailed in this plan.

2.1 Risk Identification

<This paragraph shall describe the inputs, the tools and the outputs of the risk identification activities.>

Risk Quantification

<This paragraph describes the inputs, tolls and outputs from the risk quantification process.>

Risk Response Development

<This paragraph describes the inputs, tools and outputs of the risk response development for mitigation, monitoring and control.>

Risk Response Control

<This paragraph describes the inputs, tools and outputs to control risk response as the risk events occur.>

2.2 Description of all risks above cut-off

<This paragraph provide a description of the significant risk items identified for the project:>

2.3 Factors influencing probability and impact

<This paragraph describes the impact assessment for the significant project risks.>

3.0 Risk Mitigation, Monitoring and Management

<This section shall be divided into the following paragraphs. Provisions corresponding to non-required activities may be satisfied by the words "Not applicable." If different builds or different multimedia on the project require different planning, these differences

shall be noted in the paragraphs. In addition to the content specified below, each paragraph shall identify applicable risks/uncertainties and plans for dealing with them.>

3.1 Risk item #n

1 Mitigation

<This paragraph describes the plan for avoiding risk by effective proactive mitigation activities. When mitigation activities have not been implemented, and the project is expected to manage the risk, a RISK MEMO should be created to record the fact.>

2 Monitoring

This paragraph describes the risk monitoring activities to be used on the project.>

3 Management

This paragraph describes the risk management and contingency plan. It assumes that the avoidance or mitigation strategy has failed, and the risk has become a reality.>

4.0 Risk Management Plan Iteration Schedule

<This section describes the schedule for reviewing and revising the Risk Management Plan. Ad-hoc or scheduled project milestones may be the “triggers” to revisit the Risk Management Plan and revise the mitigation, monitoring, or management decisions.>

5.0 Summary

<This section will summarise the current status of the Risk Management Plan.>

<Project Title>

Evaluation Plan

< The Evaluation Plan Template tool includes the major topics that should be included in a reliable and valid evaluation plan. The Evaluation Plan details the methods for collecting data, the composition of the sample(s) and the evaluation instruments to be used.

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Introduction
<This section introduces the major sections of the plan as well as the primary people involved in writing the plan.>
Background
<Describe any information that is needed to provide the reader with an understanding of the background of the IMM product being evaluated.>
Purposes
<Describe the purposes of the evaluation. A single plan can address a variety of purposes, but all must be delineated clearly. Evaluation is always a political process & all parties must accept the purposes for the evaluation to be successful.>
Limitations
<Spell out any limitations to the interpretation and generalisability of the evaluation. It should also describe potential threats to the reliability and validity of the evaluation design and instrumentation.>
Audiences
<This section specifies all the primary and secondary audiences or consumers of the evaluation.>
Decision
<To help the evaluation have meaningful impact on decision-making. Anticipating decisions that can be influenced by an evaluation takes creativity and trust. Many developers do not wish to anticipate negative outcomes, but these too must be considered.>
Questions
<A sound evaluation plan needs careful specification of the questions to be addressed by the evaluation design & data collection methods. The clearer & more detailed these questions are, the more likely that reliable & valid answers will be provided.>

Methods
<This section describes the evaluation designs and procedures. The keys to success are matching these options to the purposes and questions of your client and keeping within the budget and time line of the study.>
Sample
<This section specifies exactly which students, trainers, and other personnel will participate in the evaluation. If necessary, a rationale for sample sizes should also be included.>
Instrumentation
<This section describes all the evaluation instruments and tools to be used in the evaluation. Actual instruments should be included in appendices for review and approval.>
Logistics
<This section spells out who will be responsible for the various implementation, analysis, and reporting aspects of the evaluation.>
Time Line
<This section presents the schedule for implementation, analysis, and reporting of the evaluation.>
Budget
<This section “costs out” the finances for the evaluation.>



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