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1 Executive Summary

This deployment plan provides a high-level implementation approach for promoting awareness and usage of the Training for Financial Aid Professionals (TFAP) curriculum. Contents include:

- An overview of the methodology used to develop the deployment plan, and
- A detailed description of selected deployment vehicles.

Target Audience

The primary target audience for this effort consists of new and existing financial aid administrators at schools participating in the Title IV program. Specifically, this deployment effort aims to reach financial aid professionals performing the following roles: financial aid administrators, business officers, auditors, accounting personnel, and system technicians.

Process

To select the appropriate mix of deployment vehicles, the team assessed all possible options, noting the advantages and constraints of each one. Clearly defined deployment objectives assisted the team in selecting the most effective combination of deployment vehicles. Key messages were developed to ensure that consistent information would be included in all promotional materials. Team members utilized key messages to develop the content of the communications materials.

Results

To effectively deploy the TFAP curriculum, a blended approach that includes electronic, paper-based and face-to-face vehicles was recommended. Since FSA strives to operate as a “paperless” organization, the use of paper-based vehicles was limited, and paper-based products were developed for distribution during live events, such as conferences and training. This combination of vehicles provides a comprehensive solution and balances the drawbacks of each vehicle with the advantages of other vehicles. As of the writing of this deployment plan development of all communication materials was completed and distribution was pending the release of the TFAP website. Deployment vehicles used to promote the availability and usage of the TFAP curriculum are as follows:

- TFAP Website (electronic)
- Email announcement (electronic)
- Listserv Announcements (electronic)
- Announcement on Information for Financial Aid Professionals (IFAP) website (electronic)
- Poster to be distributed at conferences and training events (paper-based)
- Verbal announcements at EACs (face-to-face)
- Verbal announcements at training events (face-to-face).



2 Approach

2.1 Target Audience

The primary target audience for this deployment effort consists of new and existing financial aid administrators at schools participating in the Title IV program. Depending on the size of the university and its financial aid department, FAAs may need to perform a variety of roles and responsibilities.

Specifically, this deployment effort aims to reach financial aid professionals performing the following roles:

- Financial Aid Administrators
- Business Officers
- Auditors
- Accounting Personnel
- System Technicians.

2.2 Deployment Objectives

The deployment objectives used by the team to select the final combination of deployment vehicles are outlined below.

To reach the target audience defined above in section 2.1, the team decided to use a complementary mix of existing vehicles. The team selected a combination of electronic, paper, and verbal announcements to ensure that key messages would reach the greatest number of FAAs. In addition, the team agreed that all communications must underscore the customer focus of the TFAP initiative.

The TFAP web page was selected as the primary deployment vehicle to provide easy access to professional development materials via the internet. Existing FSA communication channels including email, listservs, IFAP, TFAP poster, EAC conferences, and FSA training were selected to announce the new TFAP website.

Deployment Objective	Description
Targeted Audience	The audience should be clearly defined.
Reach	The team will reach as many new FAAs as possible by using a variety of communication vehicles.
Accessibility	The curriculum should be easily accessible via the web.
Leverage Existing Vehicles	Guidance provided by FSA sponsorship indicated that existing FSA communication vehicles should be used to promote key messages without creating “a big splash.”
Customer Focus	The team will underscore customer focus (FAAs) throughout delivered communications.



2.3 Key Messages

Clearly defined key messages ensure that consistent information is included in all communications. All announcements will explain the context for the TFAP curriculum. This resource has been structured to enable FAAs to identify and self-select appropriate training based on course descriptions. Announcements will also clearly identify the target audience for the TFAP website and provide the web address to the resource.

The key messages outlined below were provided to team members responsible for developing communications (i.e., web developer, graphic designer).

Key Messages	
Who is the target audience for the communication?	FAAs performing the following roles: <ul style="list-style-type: none">• Business Officers• Auditors• Accounting Personnel• System Technicians
What does the audience need or want to know about?	The TFAP website contains the latest information on current and future training opportunities, conferences and other resources for FAAs.
When?	This site is currently available for use.
Where do they need to go?	www.ed.gov/offices/OSFAP/sfau/
Why?	By popular demand, current and future training, conferences and other resources have been consolidated on the FSA Course Curriculum website. This will provide FAAs with easier access to professional development materials.

2.4 Success Factors

It is important that success factors are identified for each selected deployment vehicle. The team discussed a variety of methods including discrete measurement tools and formal and informal feedback mechanisms. Possible tools to evaluate the success of the deployment effort may include, but are not limited to the following:

- Number of hits to TFAP website
- Feedback button on TFAP website
- Web link for comments on course offerings
- Feedback via the annual needs assessment.

2.5 Resources

In addition to the core TFAP project team, the following additional resources have been involved to assist in the deployment of the curriculum:

- **Web developer:** The development of the web page involves support from other FSA staff members with web development skills. Once the website is released it will require maintenance. As content is periodically updated, the web developer will need to implement these changes to the website.
- **FSA Staff:** Electronic vehicles such as emails, listservs and postings to the IFAP website will be distributed by the appropriate FSA staff.
- **Graphic Designer:** Logos and posters require graphic design.
- **Presenters:** Face-to-face vehicles, such as announcements at conferences and training sessions, require presenters. Content to be presented by speakers is outlined in the *Talking Points* included in section 3.2.



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2.6 Methodology

The Integration Partner shared with the project team best practices from other agencies and private sector clients conducting similar efforts. The team applied these best practices to identify potential communication vehicles applicable for this effort. The identified options were then grouped by type into three categories: electronic, paper-based, and face-to-face. Once criteria were reviewed for each potential vehicle, the team summarized advantages and drawbacks for each vehicle. Based on this qualitative analysis, the team chose complementary vehicles to inform the FAA community of the revised curriculum and its benefits.

Define Potential Deployment Vehicles

To address the question of how to best publicize the curriculum to FAAs, the project team brainstormed a list of potential vehicles using best practices from other agencies and private sector clients as a starting point. This list included successful communication vehicles used in the past at FSA as well as best practices used in similar efforts (where the target audience was geographically dispersed, knowledge varied based on experience, and roles varied based on the size of their universities’ financial aid department). Vehicles were grouped into three categories: electronic, paper-based and face-to-face. The table below contains the initial list of potential vehicles and includes descriptions of each vehicle. The Y/N column indicates whether the listed vehicles have been recommended to be used (Y) or not (N).

Type	Vehicle	(Y/N)	Description
Electronic	Web Page	Y	New page on FSA University Site
	Web Links	Y	Links to curriculum page, registration page, other relevant pages
	Email Announcement	Y	National Announcement to all schools
	Regional Websites	N	Information on existing regional websites
	Individual Curriculum Q&A	N	Tool to allow individuals to identify personalized courses based on information they provide regarding their experience, and role.
	Listservs	Y	Existing distribution lists.
	IFAP Webpage	Y	Announcement on Information for Financial Aid Professionals website.
	P-Messages	N	Messages pushed to schools via their school mailboxes.
	Web banner on IFAP	N	Scrolling banner on the IFAP page that provides news announcements.
	Electronic News Article	N	News article sent electronically.
	Soft Copy of Poster/Flyer	N	Soft copy of a poster/flyer to be emailed to financial aid departments to be printed and posted/distributed.
Paper-Based	Written Letter	N	A written letter to be mailed to schools.
	Poster/Flyer	Y	A poster/flyer to be printed and mailed to schools to be posted.
	Pamphlet	N	A pamphlet with detailed information about the courses to be distributed via mail.
	Post-Its	N	Post-It notes that are printed with the web address for the curriculum.
	Wallet Cards	N	A business card announcing the curriculum and with the web address.
Face-to-Face	Distribute posters at FSA training events	Y	Distribution of posters at training events
	Announcements at Conferences	Y	Brief announcements made by senior FSA officials regarding the availability of the curriculum.
	Announcements at Training Sessions	Y	Brief announcements made by facilitators during FSA training events.



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Define Criteria for Evaluating Vehicles

In order to decide on the most appropriate vehicles for this target audience, the project team needed to be able to evaluate each vehicle. The team identified criteria that were then used to evaluate the vehicles and determine recommendations. The criteria and descriptions are listed below.

Criteria	Description
<i>Accessibility</i>	How easy is it for the audience to access the vehicle?
<i>Effectiveness</i>	How effective is the vehicle for reaching the entire audience?
<i>Measurement</i>	What are the success factors we can use to measure the effectiveness of the vehicle?
<i>Frequency</i>	How often do we need to distribute/publish the vehicle?
<i>Maintenance</i>	How difficult is it to maintain the vehicle?
<i>Push/Pull</i>	Is the audience a passive recipient of information (push mechanism), or do they need to actively access the information (pull mechanism)?
<i>Approvals Required</i>	Who needs to review and approve content?
<i>Expense</i>	How much does it cost?
<i>Labor</i>	How many resources need to be involved?

Summarize Advantages and Drawbacks of Each Vehicle

A summary of the criteria used to evaluate the vehicles was created and defined in terms of the advantages and drawbacks of each vehicle. This information was then used to select the most appropriate vehicles for deployment of the curriculum. Detailed advantages and drawbacks information for each vehicle is included in the attached document *TFAP_Deployment Plan_Delivery Options_09192003.xls*.

Select Combination of Complementary Vehicles

In order to effectively reach the greatest portion of the target audience, several communication vehicles were used to publicize the availability of the curriculum. Selected vehicles complemented each other, and ensure that drawbacks of one vehicle are addressed through the advantages of another vehicle. These vehicles are discussed in section 3.0 Deployment Vehicles.



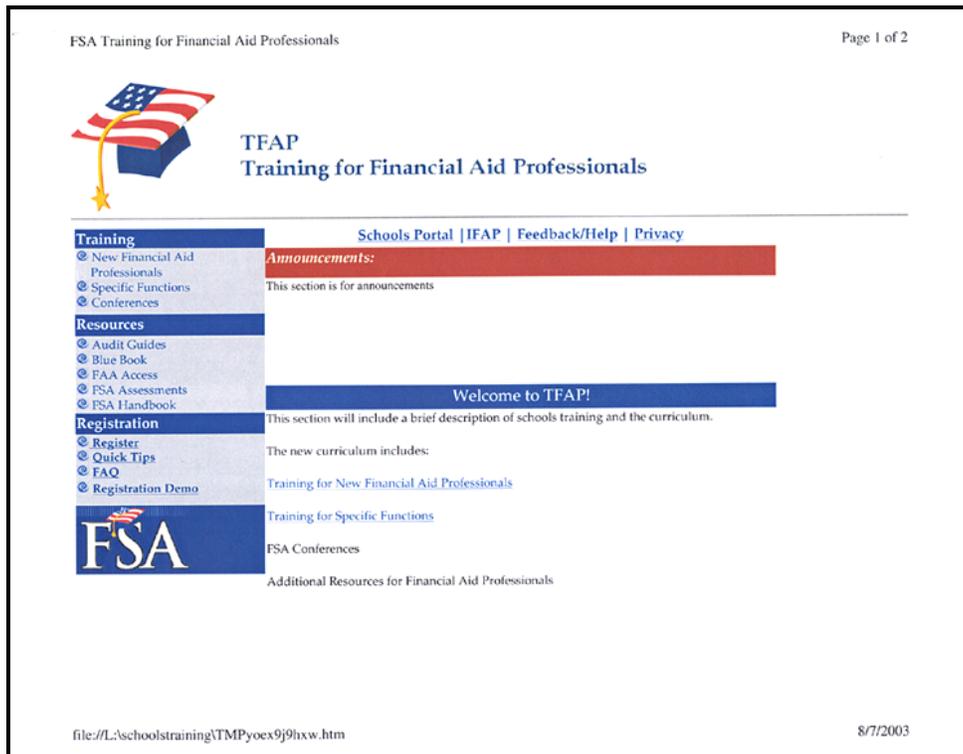
3 Deployment Vehicles

The selected deployment options outlined in this section provide an optimal mix of vehicles to promote awareness of the new TFAP curriculum among FAAs. The primary deployment vehicle for the curriculum is the TFAP website which replaces the FSA University website. A screenshot of the front page of the website is included below. All other vehicles direct FAAs to use the website. Additional communication materials include an email announcement to all FAAs, listserv announcements, posting of an announcement to the IFAP webpage, distribution of the TFAP poster at conferences and training events, and talking points for slides that will be used at live events.

3.1 TFAP Web Page

The TFAP website was selected as the primary deployment vehicle for its high accessibility to the target audience and its ease of maintenance. This centralized tool allows FAAs to peruse professional development resources at their convenience and provides advance notice of upcoming courses to aid FAAs in scheduling training. As of the writing of this deliverable, the TFAP website is scheduled to be released by the end of September pending final review by FSA sponsors. A CD with the latest version of the website can be obtained from the TFAP Project Manager, Jo Ann Borel.

This site will continue to be modified based on feedback from stakeholders and will be maintained by the team’s web specialist. The screenshot of the front page below shows the overall layout of the website which includes a welcome message explaining the site and announcements of new and upcoming training. The user-friendly navigation bar takes FAAs to training for new FAAs, training for FAAs that perform specific functions in their school’s financial aid office, links to conferences and links additional resources.





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Welcome Message

The following welcome message is included on the front page of the TFAP web site and introduces the curriculum to FAAs and provides context for the TFAP website:

Welcome to FSA’s new training website for FAAs: Training for Financial Aid Professionals (TFAP)! This centralized resource is an essential tool for planning your professional development in the administration of Title IV Programs. This page replaces the old FSA University website and provides easy access to a catalog of current and future training activities, conferences, and other learning resources available from FSA.

To further assist FAAs in selecting appropriate training, courses are grouped together by experience level and functional role. For example, FAAs in their first two years on the job (as well as FAAs who want a “refresher”) can access fundamental courses by clicking on [New FAAs](#). FAAs who need training on a specific financial aid system or in a specialized area of financial aid administration should check out courses in [Training for Specific Functions](#).

All existing courses listed on this site contain links for training registration or for viewing/downloading training materials. In addition, you will find links to financial aid conferences and important reference materials like the Audit Guide and Blue Book.

If you have suggestions on how this site could be more useful to you please send us your [feedback](#).

Additional Considerations

- Requirements discussed for the website include that the site must be easy to update, communicates key messages, contains links from IFAP and School’s Portal, and meets deployment objectives.
- Usage of the page can be measured by tracking the number of hits to the web page.
- Links to the paper-based poster/flyer will be included on the web page so that financial aid professionals who desire to do so, can print posters and distribute them.

3.2 Announcements

Under the guidance of FSA, existing communication vehicles were used to market the TFAP website. To promote awareness and usage of the website once it is released, the team will distribute email and listserv announcements to FAAs, post an announcement on the IFAP webpage, and distribute posters and verbal announcements at 2003 Electronic Access Conferences and ongoing FSA training events.

Electronic Announcements

Additional electronic deployment vehicles include email announcements to individual email accounts and listservs to push this information to financial aid professionals. Advantages of all electronic announcements are that they are paperless and provide a consistent message. Drawbacks include that usage of each vehicle varies by region, and that messages can easily be ignored or deleted.

Email Announcements

Email to individual email accounts is highly effective for FAAs who receive and read the message, but drawbacks include the lack of a comprehensive distribution list for all financial aid professionals. Listed below is content that will be included in the email electronic announcements to inform FAAs of the TFAP website:

TO: ALL Financial Aid Administrators
FROM: Federal Student Aid
SUBJECT: Announcing the TFAP Website: A New Tool for Professional Development of FAAs!

FSA is pleased to announce the new Training for Financial Aid Professionals (TFAP) website. This centralized resource is an essential tool for planning your professional development in the Administration of Title IV Programs. This page replaces the old FSA University website and provides easy access to a catalog of current and future training activities, conferences, and other learning resources available from FSA. On this site you will find links to training registration for existing courses, as well as links to financial aid conferences and important reference materials like the Audit Guide and Blue Book.

Visit the new website today at www.ed.gov/offices/OSFAP/sfau/ to take advantage of FSA’s new professional development tool!



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Listserv Announcements

Listservs are highly effective in some regions, but usage varies by region. They are low cost and paperless. The following message will be disseminated via listservs and included on the IFAP webpage:

FSA Provides A New Professional Development Resource for FAAs

Sneak a peak at FSA’s new professional development website for Financial Aid Administrators (FAAs): Training for Financial Aid Professionals (TFAP). TFAP offers a catalog of existing and upcoming FSA training, conferences, and other learning resources as well as provides links to these resources. To further assist FAAs in selecting appropriate training, courses are grouped together by experience level and functional role. In addition, this website includes descriptions of courses that are under development so FAAs can plan ahead for upcoming training. Visit the new website today at www.ed.gov/offices/OSFAP/sfau/ to take advantage of FSA’s new professional development resource!

Other Electronic Vehicles Considered

- Initially, it was discussed that the website would include the Individual Curriculum Wizard, a tool that would allow financial aid professionals to tailor a personalized curriculum by answering a few simple questions. This tool is useful when there is a large volume of courses to choose from; however, since the volume of courses is small, the team decided that the usefulness of the Individual Curriculum Wizard was low relative to the effort to implement this tool.
- The project team discussed using regional FSA websites to deploy the curriculum, but decided against this since not all regions have websites, and the usage of existing websites is low.
- In addition, the web banner on the IFAP page was considered, but is no longer in use.
- Emailing soft copies of the poster/flyer to financial aid professionals to print, post and distribute was another option that was considered, but eliminated due to the effort required by the financial aid professionals. Instead, a soft copy will be posted on the web page for those financial aid professionals who want one.
- P-Messages are sent to school’s mailboxes and can be easily ignored. Since the team will use email and listservs to reach FAAs electronically, the use of P-Messages was redundant.

Paper-based Announcements

Since FSA strives to operate as a “paperless” organization, the use of paper-based vehicles is limited to the TFAP poster. This poster will be included in materials for the upcoming Electronic Access Conferences (November/December 2003) and posted in FSA headquarters and regional training offices to alert staff to the new TFAP curriculum. A screenshot of the poster is included below.

Training for Financial Aid Professionals (TFAP)

The latest information on training, conferences and other resources

WHAT INFORMATION DOES THE SITE PROVIDE?

- By popular demand, we have created a new website for existing and future training, conferences and other resources on TFAP. This will provide easy access to professional development materials.

WHO IS THIS SITE FOR?

- Financial Aid Administrators
- Business Officers
- Auditors
- Accounting Personnel
- System Technicians

WHEN WILL TFAP BE AVAILABLE?

- This site replaces the old FSA U.S. Department of Education website currently available for use!

WHAT IS THE LINK FOR THIS SITE?

- www.ed.gov/offices/OSFAP/sfau/

U.S. Department of Education
Federal Student Aid



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Other Paper-Based Vehicles Considered

- Due to cost, business card-sized wallet cards (which would have included the web address for the FSA Course Curriculum) will not be used.
- Due to cost, post-it notes with the web address will not be distributed at NASFAA and EAC conferences.
- A written letter will not be sent to the schools since it does not directly reach our target audience.
- A pamphlet with information about the website will not be used since it would be more costly to produce and not as effective as a poster/flyer.

Face-to-Face Announcements

Oral announcements during conferences and training events will be made to create awareness of the availability of the curriculum. Talking points have been created to assist speakers in delivering key messages and are included below. In addition, posters will be distributed at these events and will serve as take-aways that include the web address for the TFAP website for participants.

Conferences

Announcement will be made at the upcoming November and December Electronic Access Conferences to encourage FAAs to use the TFAP to meet their professional development needs.

Training

A brief announcement will be made by trainers during all FSA offered training events to further publicize the availability of the curriculum.

Talking Points

Talking points for conferences and training are listed below:

- FSA now provides a new centralized training resource for Financial Aid Administrators (FAAs):
Training for Financial Aid Professionals (TFAP)
 - This website contains the latest information on current and future training opportunities, conferences and other resources, such as the Blue Book and Audit Guide
- This website was created in response to feedback received from FAAs about training.
 - FAAs wanted to know about upcoming training in advance
 - FAAs wanted to know what training is appropriate based on their role in the financial aid process
- This website is for ALL FAAs
 - This includes all financial aid personnel responsible for counseling students, processing financial aid data, financial aid auditing and accounting, and supporting financial aid systems
 - If you perform the following functions, this resource may be of use to you:
 - FAAs
 - Business Officers
 - Auditors
 - Accounting Personnel
 - System Technicians
- To assist FAAs in selecting appropriate training, courses are grouped together by experience level and functional role. For example, FAAs in their first two years on the job (as well as FAAs who want a “refresher”) can access fundamental courses, and FAAs who need training on a specific financial aid system or in a specialized area of financial aid administration can find these courses grouped together.
- Provide Weblink: www.ed.gov/offices/OSFAP/sfau/