

**To:** Anne Teresa, FSA

**From:** Howard Weitzner, Laura Miller, and Miruna Patrascanu, Accenture

**Date:** September 19, 2003

**Subject:** Deliverable 129.1.4 - "100 Series" Course Design and Development Plan

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**Deliverable Overview**

This deliverable provides a completed curriculum and course objectives for the 100 Series External Partners training, including recommendations for the development and/or revision of specified courses. Specifically, this deliverable includes:

- Final 100 Series External Partners curriculum including all edits provided by FSA University and stakeholders.
- Considerations for ongoing implementation of 100 Series.
- Training plan for the future design and development of new courses and resources for inclusion in the 100 Series.
- Recommended timeline/schedule, including major milestones for future course development.
- Conceptual description for future design of 200 or 300 level course curricula.
- Collateral information, such as working materials, as appropriate.

As a result of this initiative, FSA is now better positioned to improve the administration of Title IV programs by providing a comprehensive package of professional development opportunities for Financial Aid Administrators (FAAs). With the assistance of the Integration Partner, FSA has created the *Training for Financial Aid Professionals (TFAP)* website, a centralized development tool that offers FAAs easy access to a catalog of current and future training activities, conferences, and other learning resources.

**Business Context**

FSA provides colleges and universities participating in the Title IV program with support to accurately administer student financial aid. Continuously improving program integrity is a high priority for FSA's leadership. To effectively administer Title IV programs, financial aid professionals at participating schools require a thorough understanding of Title IV policies and FSA systems. Within FSA, the Application, School Eligibility and Delivery Services Channel develops and delivers training programs to these external partners.

Traditionally, FAAs learned of FSA-sponsored training from limited sources. Feedback from FAAs indicated they would like FSA to provide a centralized professional development resource that is easily accessible, provides advance notice of upcoming training, and enables FAAs to self-select appropriate training and locate useful reference materials.

**Subject:** Deliverable 129.1.4 - “100 Series” Course Design and Development Plan

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In an effort to improve program integrity and better serve external customers, FSA requested the assistance of the Integration Partner to identify and organize a training curriculum for schools from existing FSA resources.

FSA teamed with the Integration Partner to develop a curriculum that would serve as a knowledge resource for both new and existing FAAs. An FSA Project Manager led the team, and team members included FSA training officers who worked closely with FAAs and subject matter experts from the Integration Partner, skilled in instructional design, project management, communication planning and deployment planning.

**Approach and Results**

The vision for this initiative was to enable FAAs to more easily and appropriately select professional development opportunities to support accurate administration of Title IV programs. To be consistent with the course categorization structure followed by universities, this effort was initially called the *100 Series*. The *100 Series* was conceived as the first phase of a multi-phased approach to define different levels of training for new, experienced and advanced FAAs. This first phase would be followed by a *200 Series* for more experienced FAAs, and a *300 Series* for advanced professionals.

To identify FSA’s customer’s needs, the first step for the project team involved summarizing and analyzing stakeholder input and feedback collected through surveys. The team used the results of the *Training Needs Assessment Survey* to outline the initial *100 Series* curriculum. Survey recommendations defined areas that subject matter experts noted were critical but for which no courses were currently offered. The compilation of both existing and proposed courses comprised the *100 Series* curriculum.

After the team developed this initial course listing, it was determined that the *100 Series* course inventory was in fact a comprehensive list of all FSA training for new and existing FAAs. In addition, several of the courses did not belong in the “100-level” because they were not specifically offerings for entry-level FAAs. Some courses were relevant for all FAAs regardless of their level of experience, while other courses provided specialized systems training that applied to FAAs based on their responsibilities within their school’s financial aid office. Because curriculum materials were comprehensive and courses applied to all FAAs, the *100 Series* was re-branded and more appropriately called *Training for Financial Aid Professionals (TFAP)*.

Contents of the TFAP curriculum were organized to support FAAs in identifying and self-selecting appropriate training. Courses were categorized by experience level and functional role of the audience to be relevant to the job functions within university financial aid offices. The final structure of curriculum materials is grouped into 4 areas:

- Training for New FAAs
- Training by Function
- Conferences
- Additional Resources.

**Subject:** Deliverable 129.1.4 - "100 Series" Course Design and Development Plan

---

The latest curriculum materials posted to the website are included in the *Final TFAP Curriculum* attachments. A log of suggestions from stakeholders is provided in the *Advisor Feedback* document. Proposed courses for future development are included in the *Conceptual Design of Proposed Courses* attachments.

*Deployment*

The TFAP website was designed as the primary deployment vehicle for its high accessibility to the target audience and its ease of maintenance. This centralized tool allows FAAs to review professional development resources at their convenience and provides advance notice of upcoming courses to aid FAAs in scheduling training. In addition, the website also provides useful information requested by FAAs including a clearly identified target audience for each course, timing of course delivery, and links to registration.

Once the curriculum structure and content was finalized, the project team determined the most effective approach for marketing TFAP to FAAs. The team identified potential deployment vehicles noting the advantages and constraints of each option. Clearly defined deployment objectives assisted the team in selecting the final combination of deployment vehicles. Under the guidance of FSA, existing communication vehicles were selected to market the TFAP website. To promote awareness and usage of the website FSA 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. The full approach for the deployment plan is documented in the attached *Final Deployment Plan*, which provides a model for future deployment efforts. This document includes final versions of developed communications including email, listserv and IFAP announcements, the TFAP poster, and talking points for verbal announcements.

*Future Training*

In addition to creating a centralized professional development resource for FAAs, the TFAP initiative also identified future training needs. At the beginning of this effort, the *Training Needs Assessment Team Survey* provided a prioritized list of conceptual descriptions for course topics requested by FAAs. In addition to this survey, training needs were also identified through feedback from Training Officers (TOs). Of the proposed courses, funding has been appropriated for the development of the following two for 2004: *Spring Training 2004: Delivery System Updates/Processing Student Level Data* and *Getting It Right- Mistakes We've Found and Learned From*.

*Spring Training 2004* is offered annually to prepare FAAs for delivery system changes that impact processing of financial aid. This two-day course will be delivered via classroom-based instructor-led training and virtual classroom training. Due to feedback from FAAs, it will also cover advanced topics in student eligibility issues.

*Getting It Right* was identified by TOs and will use a case-study approach to educate FAAs about how to avoid common and costly errors found during audit and program reviews.

**Subject:** Deliverable 129.1.4 - "100 Series" Course Design and Development Plan

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Summary recommendations and assumptions for *Getting It Right* have been included and will be further defined once FSA allocates the appropriate resources for course development.

Together, Integration Partner and FSA have defined the scope, learning objectives, team structure, roles and responsibilities, and milestones for these courses. Parameters and assumptions for course development have been documented in training plans and work plans for each course. During project kickoff meetings, the respective training plan and work plan will be used to educate team members about course scope, target audience, and implementation strategies. Materials for both courses (i.e., learning objectives, training plans, milestones, roles and responsibilities) are attached.

**Future Considerations**

FSA must continue to provide sponsorship and resources to maintain the TFAP curriculum and website as an effective tool for the professional development of FAAs. Specifically, ongoing maintenance may include:

- Continual assessment of FAAs' training needs
- Updating curriculum content as-needed
- Creating a continuous improvement process for implementing feedback resulting from training programs and the TFAP website
- Continuing to review and confirm the vision on long-term basis to ensure FSA leverages the TFAP tool as a cornerstone for improving program integrity.

Maintenance requires a content manager who periodically assesses the training needs of external partners, and reviews and updates the TFAP curriculum; and a web specialist who can implement these changes to the website. To provide access to training materials for a broader audience, FSA plans to use the website to archive course materials that have been delivered. In addition, FSA will use the announcements section of the website's front page for communicating important and timely messages about professional development to FAAs.

So that TFAP can evolve to meet the changing needs of FAAs, FSA will need to determine a process to catalogue and incorporate feedback regarding content and design of the curriculum. This includes suggestions from FSA stakeholders and Training Officers and feedback obtained through the website's feedback button and the *Training Needs Assessment Team Survey*.

Now that FSA has defined a structure for meeting the immediate professional development needs of FAAs, it needs to determine how it will leverage this resource to prepare for its customers' long-term development needs. The TFAP website provides the opportunity to truly improve program integrity by placing the training needs of FAAs at the forefront of training development. Having developed and promoted a curriculum that is based on the educational needs of FAAs, FSA strengthens the FAA's ability to accurately administer Title IV programs in accordance with these regulations.

**Subject:** Deliverable 129.1.4 - "100 Series" Course Design and Development Plan

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### **Lessons Learned**

At the end of the project, a "lessons learned" session was conducted to identify project tasks/objectives that worked well and those areas that could be improved on future projects. Key points from this discussion are listed below.

- **Sponsorship:** The team agreed that sponsorship from key stakeholders contributed to the overall project success. Due to a reorganization within FSA, a resulting change in sponsorship provided challenges to staying on course. To ensure that a leadership change does not negatively impact a project, the existing sponsor must educate the new sponsor on the value, context, and direction of the project. In addition, the sponsor needs to share their vision with the entire team and not just the team's project manager.
- **Process:** The use of the *FSA University Training Process* provided a structured and disciplined approach for team members. The tools, templates and checklists in this process facilitated the rapid and timely completion of the TFAP project. In the future, FSA should continue to leverage this valuable resource in their training efforts.
- **Teaming:** Effective teaming is another factor that contributed to the success of this project. The team used a charter to lay the ground rules for open and honest communication. In addition, a communication plan was used to ensure key messages about the progress of the effort reached appropriate stakeholders and secured ongoing sponsorship for the initiative. The team had the right mix of skills to accomplish their mission and may have further benefited from defining roles and responsibilities for the extended team. In spite of conflicting demands for time, team members remained committed to this effort and continued to meet regularly and adhere to deadlines.
- **Effective Meetings:** Meetings were well facilitated by the Project Manager who prepared clear objectives for each meeting. The team maintained forward momentum through regular meetings, but divided work into assignments that each team member could complete individually. By using this structured collaborative approach, the team was able to complete assignments in a timely fashion while still sharing feedback with the larger team.
- **Defined Requirements:** The Project Manager ensured that the design for all products (i.e., website, TFAP poster, etc.) was completed prior to assigning responsibility to team members to build them. Such planning provided team members with all of the requirements up front and reduced the need for rework.
- **Virtual Collaboration:** Several of the team members worked remotely and were kept aware of project materials via soft copies of documents. Version control of the many documents for this project provided a challenge for remote team members. In the future FSA would benefit from creating a naming convention for documents that includes a version control mechanism (i.e. date or version number).
- **Checkpoints:** In addition, the team agreed that it was helpful to periodically reflect on the project's direction to ensure that team members and sponsors were comfortable with path and expected outcomes. Future FSA workplans should reflect a shared understanding of the journey and include team checkpoints to verify that the team is making progress consistent with the overall goals of the project.

**Subject:** Deliverable 129.1.4 - "100 Series" Course Design and Development Plan

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**Attachments:**

*Final TFAP curriculum*

- Filename: Final-Web\_TFAP\_Basic\_09192003.doc
- Filename: Final-Web\_TFAP\_Functional\_09192003.doc
- Filename: Final-Web\_TFAP\_Conferences\_09192003.doc
- Filename: Final-Web\_TFAP\_Additional Resources\_09192003.doc

*Conceptual Design of Proposed Courses*

- Filename: TFAP\_Basic\_TBD\_09192003.doc
- Filename: TFAP\_Functional\_TBD\_09192003.doc

*Advisor Feedback*

- Filename: TFAP Curriculum Feedback\_09192003.xls

*Final TFAP Deployment Plan*

- Filename: Deployment Plan\_09102003.doc
- Filename: TFAP\_Deployment Plan\_Delivery Options\_09192003.xls
- Filename: TFAP\_Poster\_09-19-2003.doc

*Spring Training 2004 Materials*

- Filename: Spring Training 2004\_Training Plan\_09192003.doc
- Filename: Spring Training 2004\_Learning Objectives\_09192003.doc
- Filename: Spring Training 2004\_Role Map\_09192003.doc
- Filename: Spring Training 2004\_Workplan\_09192003.doc
- Filename: Spring Training 2004\_Videoconference Treatment\_09192003.doc

*Getting It Right Materials*

- Filename: Getting It Right\_Training Plan\_09192003.doc
- Filename: Getting It Right\_Learning Objectives\_09192003.doc
- Filename: Getting It Right\_Audit Review Findings\_09192003.doc