



To: Anne Teresa, FSA

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Subject: Deliverable 129.1.5 – FSA Skills Catalog Design and Development Approach

Purpose

FSA has several ongoing integration initiatives designed to meet its five objectives of modernizing and integrating systems, improving program integrity, reducing costs, improving products and services, and improving human capital. To support the goal of improving human capital the FSA Skills Catalog is being updated and revised. The revised FSA Skills Catalog is a critical to FSA developing its workforce as a strategic asset for the organization.

The FSA Skills Catalog is a compilation of the associated knowledge, skills and abilities required of FSA staff, and is a principal tool for FSA Management to identify skill gaps and workforce development needs. The FSA Skills Catalog will be revised using information on skills gaps provided by FSA and will result in a consolidated summary of FSA's current skill needs.

The Integration Partner will provide support to FSA for revision and deployment of the FSA Skills Catalog and will work alongside FSA University staff on this effort. Responsibilities of the effort will be shared, with the Integration Partner focusing on design and best practices and FSA University staff focusing on information gathering and analysis. This deliverable outlines the design and development approach identified as the basis for developing the FSA Skills Catalog. It also provides templates for FSA University personnel to document skill discussions and contains a status tool to measure the status of the overall effort.

Deliverable Contents

This deliverable summarizes the design and development of the revised FSA Skills Catalog and the tools used for this process. Specifically, it includes:

- All design information to serve as a basis for developing the FSA Skills Catalog
- Matrices and templates for FSA University personnel to document skill discussions
- All required components to measure the status of the overall effort

Subject: Deliverable 129.1.5 – FSA Skills Catalog Design and Development Approach

Design Information

The current FSA Skills Catalog is the foundation for the revised FSA Skills Catalog and will be rooted in best practices from other government agencies, the Department of Education and the private sector. The existing FSA Skills Catalog is based on a skill model that categorizes employee skills into three areas: professional, managerial and functional. Professional skills are necessary to conduct daily FSA activities and are required by all FSA employees, regardless of job position. Managerial skills are associated with leading and managing employees and projects and are required by FSA supervisors, managers and executives. Functional skills are required for a channel/organization to successfully perform in FSA and are often unique to that organization. Using the current three-tiered skill model and beginning with the existing skills, it is necessary to review and modify content using best practice research and departmental expertise, aligned with the new organizational structure. FSA has identified the following organizations to be included in this effort: the CFO, CIO, Financial Partners, Project Management and Contracts and Acquisitions.

Development Approach

This development approach is based on a set of repeatable processes and is divided into six distinct phases: visualize, plan, design, develop, deploy/communicate and close. The focus of this deliverable is on the design and development phases. The Vision and Plan phases are part of the overall development process and are therefore described below. The Deployment phase is also listed as it is the next step once development is complete. For further detail and best practices on development, refer to *Attachment #4: FSA Skills Catalog Process Flows*.

Visualize

To initiate the FSA Skills Catalog revision process, the organizational needs for a revised FSA Skills Catalog were reviewed with the FSA sponsor and documented. A clear vision for the effort was defined by analyzing the needs and immediate and long term goals of both FSA and FSA University. This vision is to use the revised FSA Skills Catalog as a foundation for developing FSA's workforce as a strategic asset.

Plan

After the vision was defined, clear milestones were established. These milestones are based on the time and resources necessary to complete the tasks and ensure that each milestone leads towards the end goal. Once the milestones were identified and reviewed to ensure support of vision/solution, a workplan was created. The workplan defines the schedule, assign tasks, and confirms that steps are completed as planned. During later phases the workplan will be updated to reflect any changes in timeframe or tasks. The FSA team lead uses the workplan to monitor the work effort and to identify issues to be communicated to sponsors, stakeholders, and/or team members. See *Attachment #2: FSA Skills Catalog Workplan* for the current workplan.

Subject: Deliverable 129.1.5 – FSA Skills Catalog Design and Development Approach

Design

The design of the FSA Skills Catalog is based on the existing FSA Skills Catalog and is rooted in best practices and FSA expertise. Refer to the Design Information section above for more details on the FSA Skills Catalog design.

Develop

The development of the FSA Skills Catalog is a multi-step process that builds on each successive step. FSA will apply the same process to each organizational entity FSA has identified to be included in the effort. The FSA Skills Catalog development process consists of the following steps:

1. Align with FSA Performance Plan
2. Identify & interview General Managers (GMs)/Business Owners
3. Identify & interview Subject Matter Experts (SMEs)
4. Identify skills and best practices from outside FSA
5. Identify & prioritize FSA skills
6. Develop skill descriptions
7. Segment skills by type & functional area
8. Define proficiencies (as needed)
9. Review draft FSA Skills Catalog (skills, skill descriptions, proficiencies)
10. Package & deploy FSA Skills Catalog (learning tracks, training & development)
11. Revise FSA Skills Catalog (as needed)

Deploy/Communicate

To successfully deploy the FSA Skills Catalog, a deployment strategy, including a communication plan, will be developed. The deployment strategy will ensure that the appropriate audiences are fully engaged. When the FSA Skills Catalog is successfully deployed, it will assist both FSA and FSA University in achieving the objectives previously stated. Following this approach, specific recommendations will be further developed by the team and may include:

- Review of previous deployment effort
- Examination of deployment options that vary by role (supervisor vs. staff)
- Accessibility of information

Close

After the initial skills catalog is deployed, FSA should be prepared to apply the process to the rest of the organization. Specific activities occurring during the Close phase will include:

- Conduct project evaluation
- Present findings to sponsor
- Celebrate success

Subject: Deliverable 129.1.5 – FSA Skills Catalog Design and Development Approach

Templates and Working Papers

As stated in Task Order 129, the Integration Partner will work alongside FSA University staff, with the Integration Partner focusing on design and best practices and FSA University staff focusing on information gathering and analysis. The following supporting materials have been provided thus far; refer to each attachment for detailed information:

Project Description Draft

The Project Description Draft provides an overview of the project in its entirety and outlines all aspects involved in the FSA Skills Catalog revision effort. It discusses the business need, objectives, scope, process, deployment and risks. The primary purpose of this document is to enable FSA University staff to repeat the effort with other organizational entities without the support of the Integration Partner. Since this is a summary document which describes the recently defined process, the document is currently under development and only a draft version is included. A final version will be included in the next deliverable. See *Attachment #1: Project Description Draft*.

FSA Skills Catalog Workplan

As described in the Plan phase above, the workplan defines the schedule, assigns tasks, and confirms steps are completed as planned. See *Attachment # 2: FSA Skills Catalog Workplan*.

FSA Skills Catalog Role Map

The FSA Skills Catalog Role Map provides a breakdown of each role, including role responsibilities and time commitment. The FSA Skills Catalog Role Map was developed during the initial planning phases of the project. See *Attachment # 3: FSA Skills Catalog Role Map*.

FSA Skills Catalog Process Flows

The FSA Skills Catalog Process Flows are founded on best practice research and processes and are customized for FSA's capability building program and detailed design of the FSA Skills Catalog effort. Illustrated are best practice examples from the Office of Project Management (OPM) and One-Ed in addition to models of workforce realignment, competency alignment, skills sourcing and the FSA Skills Catalog development process. See *Attachment #4: FSA Skills Catalog Process Flows*.

FSA Skills Catalog Status Document

The FSA Skills Catalog Status Document was created to assist the FSA team lead track and report the status of the effort. The FSA Skills Catalog Status Document contains a dashboard which tracks the 5 targeted organizations and their progress through the 11 step development process. Also provided is an issue tracking log for the team lead to be able to note risks, action items and issues that require management attention. See *Attachment #5: FSA Skills Catalog Status Document*.

Subject: Deliverable 129.1.5 – FSA Skills Catalog Design and Development Approach

Financial/Accounting Skills Best Practices

The Financial/Accounting Skills Best Practice Research provides skills assessment and workforce development best practices related to the Finance and Accounting areas. This information was identified at the request of FSA to support the FSA Skills Catalog effort for FSA's CFO organization. See *Attachment #6: Financial/Accounting Skills Best Practices*

Subsequent Phases and Next Steps

In subsequent phases, the team will build upon its progress to date through steps that culminate in a deployment-ready, revised FSA Skills Catalog. The overall strategy involves determining the proper approach and technique for deploying the FSA Skills Catalog and ensuring accurate and updated skills and skill descriptions. As the team defines the proper approach to revise/deploy the FSA Skills Catalog, it will also determine corresponding success factors for the effort.

Attachments:

1. *Project Description Draft*
2. *FSA Skills Catalog Workplan*
3. *FSA Skills Catalog Role Map*
4. *FSA Skills Catalog Process Flows*
5. *FSA Skills Catalog Status Document*
6. *Financial/Accounting Skills Best Practices Research*