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SFA University

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Research and Summary Document

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Document Summary

The objective of this document is to provide best practice research for identifying and defining knowledge management and Customer Relationship Management (CRM) practices within the SFA U's functional area of student Financial Assistance. The secondary objective is to identify distinguishing characteristics and potential future service functions which will help support a transformation to a performance based organization. The objectives were met by collecting best-in-business information on the development of a corporate university from various sources including multiple best in business research documents. The content is organized by subject as outlined in the table of contents, ending with findings specific to SFA U. Document findings are intended to act as a preliminary foundation for development of an implementation plan with key business components within SFA U.

Knowledge Management

Key Principles and Characteristics

Knowledge management is not just a way of warehousing information, but includes processes and organization of information determined by a well defined strategy that insure efficient use. Although information can and should be filtered and organized to meet the internal audience needs, efficacy is only insured when knowledge management is incorporated enterprise wide.

Economist Sidney Winter describes business firms in the most basic terms as “Organizations that know how to do things.” A company truly is a collection of people organized to produce something, whether it be goods, services, or some combination of the two. Their ability to produce depends on what they currently know and on the knowledge that has become embedded in the routines and machinery of production. The material assets of a firm are of limited worth unless people know what to do with them (Davenport, 2000). Managing the wealth of current and future knowledge of an organization is inherently challenging and yet an ultimate imperative. Knowledge management as a robust practice insures that these precious resources are both protected from loss and that accessibility is given organization wide.

The focus of this knowledge management analysis is on the corporate university. While corporate universities differ in many surface aspects, they tend to organize around similar principles and goals in pursuit of their overall objective. These goals and basic principles are listed below.

Goals:

- Provide learning opportunities that support the organization’s critical business issues
- Design a curriculum to incorporate the three Cs: Corporate citizenship, Contextual framework, and Core competencies
- Train the value chain, including customers, distributors, product suppliers, and the universities that provide tomorrow’s workers
- Move from single focus instructor-led training to multiple formats of delivering learning
- Create a measurement system to evaluate outputs as well as inputs

Principles:

- Assume a focus for developing learning solutions that address needs of all organizational competencies (e.g., Washington D.C. Headquarters and regions)
- Consider the corporate university model a process rather than a place of learning
- Encourage leaders throughout SFA to become involved with and facilitate learning
- Management should encourage a climate of participation. Knowledge management is a dynamic process which requires a dedicated staff to maintain data integrity

- Knowledge base quality is dependent on organization wide participation
- Knowledge is dynamic in nature and vital to the success of the organization
- A culture of “Knowledge Sharing is Power” should be emphasized throughout SFA.

Primary Services

Within a robust knowledge management practice certain services are defined by strategy and should allow for efficient use of housed information. The primary services which should be found in any knowledge management practice include the following:

- Packaging and sharing best practices and experiences
- Tracking salient information of interest to the organization on the internet and other reference sources
- Filling employee knowledge gaps
- Capturing and disseminating innovative solutions of interest to the organization
- Coaching support for users
- Responding to requests for assistance
- Ensuring information submitted to the knowledge base is practical, viable and correct through the knowledge champions

Organization

In order to insure that services associated with knowledge management will occur, a team must be identified within the enterprise that is responsible for the ongoing development and maintenance of knowledge management. This team should be composed of knowledge; sponsors, administrators, champions, and managers. Their responsibilities are outlined below:

- Knowledge sponsors - Executives who provide overall guidance, direction and support for the Knowledge team
- Knowledge administrators - Database administrators to maintain database integrity and design
- Knowledge champions - Subject Matter Experts from the most appropriate unit, ensure data accuracy
- Knowledge managers - Individuals responsible for data maintenance and quality, user relationships, championing participation and research, and maintaining a close relationship with all business units (Meister, 1998)

Major Knowledge Base Components

Although content and needs differ from enterprise to enterprise, all robust knowledge practices include some combination of the same base components:

- Simple customer data submission interface
- Discussion/ Collaboration Forums
- Reference Documentation
- Contact database
- Hyper Links to relevant web sites
- Access to the organization's Best Practices databases
- Home page and e-mail integration

However the defining character of the various components cannot be identified without a clear understanding of the strategy that determined its' creation. In all of the best examples of knowledge management practices, a well defined strategy exists to guide the organization and provide structure for ongoing development of the practice.

Planning and Strategy

A well defined and implemented strategy allows the organization to successfully design and maintain the required architecture, and infrastructure. It also promotes the right culture needed for a robust knowledge management practice. Critical factors within this strategy include identification of organizational goals, guiding principles, standardization, and audience and need identification. (Kotter, 1999)

Database organizational strategy example

The organization of information into specifically audience tailored databases is a common practice for best in business knowledge management practices. The following information exemplifies a strategic design of the architecture tailored to the internal and external audiences in the form of a small, standard set of repository formats, or container types:

- Simple small document libraries and project team databases, used by teams in a small community of practice
- Sophisticated large document repositories, with a comprehensive indexing taxonomy for finding relevant documents among tens of thousands of unfiltered knowledge objects
- Power packs which are highly filtered, tightly organized "best of the best repositories on a specific, professional subject matter areas (Harkins, 2000)

Of course, the strategy for each organization must take into consideration its unique needs and organizational characteristics. The differences between federal and non federal focused knowledge management systems will be visited later in document. However, before specific differences are examined, a further look at knowledge management systems should be given.

Learning Materials Repository

Key Principals

An online learning materials repository houses all learning materials for an organization on the internet or intranet. Learning materials stored on an intranet/internet provide fast, easy, and inexpensive access to training when and where training is desired by users. Job specific curricula can be actively linked to training materials and vendor offerings which simplify access to learning. These efficiencies demonstrate the ease of training materials repository compared to more traditional methods of training. In addition to inexpensive access and simplified learning, electronic copies of materials are quickly and inexpensively updated (compared to paper copies) and provide an ease in storing and retrieving training materials for both facilitators, students, and web masters. Below are requirements for effective online repositories.

Requirements

Potential problems and barriers should be minimized for all students. Identified below are four items that can minimize some of the more common issues with online learning.

- A Computer Skills assessment Tool (CSAT)
  By developing this tool, a student's computer literacy can be determined before the first course is taken. If the CSAT shows that a student would benefit from a course on navigating through a website, the student would be able to take the course at the level indicated by the CSAT.
- Minimum computer hardware and software requirements
  Before a course can be taken through a website, each student computer should meet the minimum requirements to access the course.
- A student manual
  To allow for frequent updates, the manual should be online. The student manual is the first place a student goes to see the courses offered, determine a learning schedule, and potentially register for materials. The manual should be filled with information on courses, course content, and prerequisites and computer requirements.

- A telephone help line
  The help line should be available if a student requires assistance with setup or computer problems. A help line should be provided to help with these problems at the time of need. Having a help line devoted to solving online training needs will ease the process for the student and make the training more enjoyable (Short, 2000)

Focusing on “look and feel” challenges can determine the student’s experience while taking training. The items below should be addressed frequently to ensure that standards are met after each addition and/or change to the training site.

- User friendly interfaces ensure the student’s ease in maneuvering through the site.
- A search feature is an efficient way for the student to find a course he/she knows exists within the repository.
- Downloadable training materials. The student’s first experience with the website will shape his/her desire to use the site again. If material cannot be retrieved at the time of need, the experience the user has is impacted negatively.
- Archiving of dated materials helps to maintain the repository. Older materials can be archived and used for reference.

Background

Technology must be appropriately used to accelerate employee learning. Major innovations in support systems, improved delivery technologies and global reach are transforming the face of learning at breakneck speed. The ability to disseminate new material within the company overnight is now the expected norm. With technology-based learning, employees can complete courses “just-in-time” of needing the knowledge. In a market-driven economy where business conditions change so fast, this is crucial to obtaining a competitive advantage in a global market-place (Meister, 1998). Because of this, real-time interaction is valued more in corporate environments than in academia. Corporations have access to the hardware systems required to reliably transmit real-time video and audio to multiple locations; and they have control over the scheduling of employee’s time. Corporations can ensure that employees are able to access real-time video/audio transmission by using reliable group scheduling (Andersen Consulting, 2000).

The internet also allows for an expanded instructional approach in the workplace because it supports many levels of interaction. An internet-delivered course can easily break the CBT sentence of solitary confinement. The dynamic languages of the World Wide Web, allow learners to experience instruction on three levels:

1. between learner and content (e.g., taking a server-graded pop quiz online)

2. between learner and instructor (e.g., e-mailing or chatting in real-time with instructor for special help)
3. between learners (e.g., electronic bulletin boards where groups gather to brainstorm issues)
(Phillips, 1998)

To help increase the efficiency process of learning while in the workplace any system that claims to instruct (as opposed to inform) must be capable of placing learners in a managed learning environment that includes the basic functions of curriculum structure, assessment, prescription, enrollment, progress monitoring, record keeping, and reporting. (Foshay & Bergeron, 2000). All of these processes ease the process of learning and helps to track how and when knowledge is dispersed throughout the workforce.

Advantages to Online Learning

Distinctions between for-profit and non-profit enterprises are fading. Because e-learning represents a powerful convergence of technological opportunity and economic necessity, its emergence presents a unique occasion to undertake a considered reevaluation of the role and function of education over the course of the lifetime (Stokes, 2000) . In the old economy, one's life was divided into the period one went to school and the period after one graduated and worked. Today, our knowledge and skills are really only adequate for a period as short as 12 to 18 months, and then we must replenish them to compete in the global knowledge economy (Meister, 1998). The paradigm shift from traditional learning to learning over a lifetime explains why corporate universities are more apt to implement online repositories to store current knowledge to be used in current business practices and archived for reference once the knowledge is dated. The three advantages listed below help to reinforce why online training is an answer to education over the course of a lifetime.

- timeliness: learner can access lessons and information when needed.
- accessibility: courses can be taken on more than one computer and are accessible from anywhere in the world.
- flexibility: courses are available when the learner is available to take them.
- (Online, 2000)

Online Course Catalog

Key Principals and Characteristics

The online course catalog displays all course offerings that can be retrieved from the repository after registration. Curricula for each major position in an organization are available on the intranet/internet and are linked to the applicable course offerings. This process allows course information to be quickly updated, providing rapid dissemination of the most current information to the entire unit.

Requirements

For the online catalog to be of most use to the student, it must exist as a “one-stop-shop” for all of their training needs. The following are a few aspects that should be included in all online training catalogs.

- Links to vendor training sites.
- Links to the Learning Materials Repository.
- Announcement Section for training news information.
- Users Forum access (should a user forum exist).

Competitive Characteristics

One of the primary cost efficiencies of the corporate university is to centralize operations such as design, development, registration, vendor management, and measurement (Meister, 1998). An example of an online materials repository exists at the Van Kampen American Capital University.

One company that is extensively using the self-paced learning model is Van Kampen American Capital University…Currently the university offers 500 plus self-paced courses to employees. In fact, this emphasis on self-directed learning has led Van Kampen American Capital Dean Tamara Scott to create a Customer Fulfillment Center to keep track of the inventory associated with these technology-based products. (Meister, 1998).

Course Evaluations

Key Principals and Characteristics

After the student has completed the course, an evaluation should be given. These evaluations can give insight into the complexity of the course, difficulties of the course structure, and determine whether or not the student feels the course is beneficial. These aspects and those listed below, help to define how the course evaluations should be created in order to retrieve beneficial information about the online courses.

- Course evaluations are important for internal and vendor courses.
- The intranet/internet should provide an easy interface for submitting course evaluations.
- Workers need easy access to course evaluations to make decisions on what courses meet their needs.
- Course evaluations should be monitored in order to update and recommend curricula.

Requirements

Online course evaluations should be created in conjunction with the Online Course Catalog and Online Repository. Below are a list of required components to make a smooth the transition from course to evaluation. The results of the evaluations should then be used to create and update courses.

- Evaluations should be easy to interface with other submission processes.
- An archiving system should be created for out-dated evaluations.
- Content should be monitored, updated and changed using course evaluation feedback.
- Feedback mechanism to provide information trainers or web masters.
- Each evaluation should have numerical valuations with comment fields.

Competitive Characteristics

Jay Zimmerman, the manager of Research and Quality at the Bank of Montreal's Institute for Learning, and Judy Schueler at the University of Chicago Hospital Academy, both cite examples of how training impact can be measured. The competitive characteristics represent different Corporate Universities and their views on the importance of evaluations. The examples below demonstrate how evaluations can be conducted and used to impact the workforce.

"We've instituted a regular level three, three-month follow-up assessment. We go out to participants and we say, 'Remember three months ago you took the XYZ course.' We ask them to reflect back on the course, and then ask, 'Given you've had three months to apply what you learned, have you had an opportunity to apply it?' Maybe they've changed jobs; maybe their environment hasn't let them apply learning to the job. If they had the opportunity to use what they learned, to what extent are they actually applying it? If they're applying it, what impact are they seeing, in terms of quality of their work, efficiency, customer retention and satisfaction, and timeliness?" (Meister, 1998, p.78).

University of Chicago Hospital Academy provides an example of using traditional measurements with customer and employee satisfaction surveys. For example, University of Chicago Hospital does measures on the four Kirkpatrick evaluation levels. "Probable like everyone in the world, you have your immediate measure after formal learning," says Judy Schueler, "We use classroom assessment techniques, course evaluation forms, instructor rating forms, etc. The second level is, did learning occur in the structured environment? So, we do pre- and post- skill testing. Level three is focus groups for managers: 'As a result of this learning, what changes are you seeing in your area?' The fourth level, which is essentially why we have an entity for organizational learning asks, 'What impact does it have on our patients and internal customers?' " (Meister,1998, p.79).

Customer Relationship Management

Moving towards a CRM Focused Organization

Some organizations are product-driven, that is, they take an 'inside-out' perspective. These organizations tend to view the outside world through their own lens, with characteristics such as being organized around product lines and physical interaction channels. Others are more customer-centric, building mechanisms -- such as a common web site or centralized, integrated customer contact center -- to focus on the customer. There is value to be found in every model…however, the the most successful organizations today look through the lens of the customer. The most effective way to insure customer satisfaction and increase efficiency is to know the customer better than they know themselves by becoming a customer driven enterprise.

The leap to customer-driven is dependent on an organization's ability to harness the power of electronic commerce and take an 'outside-in' perspective. The traditional approach to viewing customer relationships uses 'inside-out'-oriented measures - measures that are important to the company, such as cost-to-serve. Being customer-driven requires companies to measure the relationships using criteria important to the customer. For example: the customer's perceived value of the relationship relative to the customer's level of satisfaction. The move to customer-driven is not a simple progression but rather a whole new way of doing business (Andersen, 2000).

Key Principals and Characteristics

The shift of an organization towards a performance based model partners well with the efficiencies created with a organizational transformation to a customer centric organization. The practice of being truly customer focused is encompassed in the practice known as Customer Relationship Management (CRM). The foundation of effective CRM can be found in the following key principles and characteristics:

- Utilization of customer insight to identify efficient and inefficient customer relation practices must be the basis of on-going process improvement
- Customer centric organizations utilize best practices as well as internally developed standards
- Customer centric organizations recognize in all practices the lifetime value of a Customer
- All of the organization must recognize levels of service in keeping with rising customer expectations
- To be successful, Customer Relationship Management needs to be an integrated organization-wide transformation

Key Training Assumptions for a CRM Focused Organization

Successful transformation to a CRM focused organization requires the understanding of a few basic assumptions. The first of these assumptions is the basic understanding that training is only one critical component of a performing workforce, other support structures must be in place to affect the desired change in behavior. These support structures should include such tools as performance measurements, performance rewards, and associated support management processes. Once CRM related training implementation has been incorporated into the organization, new hire training curricula should be reviewed for continuity and changes made to include CRM. The transformation of an organization must include these measures to insure the required shift in organizational culture.

Primary Processes

In an effort to ensure successful CRM, certain major processes must be created and consistently maintained. These processes include:

- Identifying current and emerging CRM best practice processes which can be adopted by the organization
- Working closely with department leads to insure the customer is the center of organizational goals
- Performing customer satisfaction analyses to monitor quality and to determine improvement opportunities
- Nurturing a climate which fosters two way communications on CRM practices throughout the organization
- Actively publicizing CRM processes Internally and externally

Customer Equity

A good measure of success in a customer driven enterprise is what is referred to as customer equity. Customer Equity is built by consistently demonstrating a commitment to deliver against the promise of value made to customers. In other words, the key to building customer equity is a company's ability to deliver a consistently exceptional customer experience from the first point of contact right through the lifetime of the relationship. Getting there, requires a set of core CRM capabilities, all of which are closely linked.

1. Customer Insight -- capturing relevant customer information across all customer touch points, and using it to build a unique, fact-based understanding of the customer's needs.

Building customer insight starts with the continuous aggregation of data, gleaned from multiple sources, such as externally purchased data, company customer data, and Web-based, "click-through" data. Using analysis and modeling, a unique, fact-based understanding of customer needs and future preferences can be developed. This understanding allows a company to create a single view of the customer, moving them from the anonymous to the familiar very quickly. Insights can then be applied to help differentiate the offers and personalize the interactions.

2. Customer Offers – configuring products and services into differentiated solutions that meet customers' needs and intentions. In a customer driven enterprise, offerings are dynamic and innovative, constantly validated and measured to meet customer needs.

3. Customer Interactions – enabling customers to interact seamlessly across all touch points, whenever, wherever and however they choose. Providing high-quality service and personalized interactions, that bring the customer back based on a unique and positive experience. The challenge is to make it easy to do business with you, no matter which channel the customer chooses.

4. High Performing Organization – creating and nurturing the kind of environment that attracts, develops and retains the best customer skills and experience across the enterprise. Delivering that personalized service comes down to the employees in an organization who can view the customer as an asset. An organization must develop, empower, and reward employees in order to influence the customer relationship positively and favorably. For it is human performance, more than specific products or services, that delivers a customer experience.

5. Enterprise Integration – establishing intra- and extra-enterprise connections to deliver on the commitment to customers. The ability of new technologies, which allow employees to view customer history and priorities, or enable employees to provide personalized service, must be linked across the enterprise. This usually means going outside their own four walls to find the right partners with the ability to deliver expanded products and services. The need to slash time-to-market will rely on the formation and successful execution of multiple alliances. The capability of an organization to identify and integrate the alliance partner will be critical to its success in continually matching and delivering against the customers constantly changing needs.

To maximize customer equity, companies must excel in all five of the capability areas. Companies that succeed in building an integrated set of CRM capabilities will drive customer equity. (Renner, 1999)

SFA University Distinguishing and Unique Characteristics

Having outlined the major processes and characteristics involved in a robust knowledge management practice and CRM, the next logic step is to begin identifying those unique characteristics which may help define the needs of SFA U's future state.

Knowledge Management Systems (comparing Federal / non Federal)

Although there are a few unique characteristics which distinguish SFA U from other federal entities, such as it's charter to become a performance based organization, there is still great value in examining the similarities and differences which generally exist between federal and non-federal entities.

Like general business, Government Technology magazine, July 99, reported that 70% of a companies value is in knowledge and intangible assets. What this logically points to is the parallels in knowledge capital needs shared between federal organizations and business at large. This parallel includes the need to gain insights from customer contact feedback to improve services. As with large private corporations, federal organizations often have following in common:

- Geographically separated regional centers
- The need for a well defined strategy to deliver information about industry practices and business processes to a widely dispersed population
- The need to develop a consistent educational experience to maintain core cultures while developing critical risk assessment skills faster
- The need for methods to quickly and effectively share best practices and innovative solutions

However, in developing the appropriate strategy, federal organizations must consider certain inherent differences between themselves and outside systems. The majority of non-federal information is not public and its dissemination can be controlled if desired. This differs greatly from the federal sector in which information is open to the public through the Freedom of Information Act. Also, most federal entities must be extremely careful to avoid an appearance of favoritism when creating links to vendors. Identifying outside partners to maintain systems databases becomes a greater challenge than with general business where best decisions are based on cost benefit and established best practice history. When you look at the fact that private sector company's service and product lines go through lifecycles more quickly than a federal agency's, one starts to see the differences in the needs and challenges between federal and non federal organizations when creating it's knowledge management practice.

Further challenges faced by those creating a knowledge management practice include difficulties faced in the cultural character of traditional federal agencies. The hierarchy system of federal entities do not inherently nurture knowledge sharing. Present “Keepers of Knowledge” who often fear losing peer influence and prestige must be convinced to contribute, feeling that knowledge is power. Inertia must also be overcome to get workers actively involved in knowledge sharing. Rewards for active participation need to be created to encourage participation. As with any large organization, data quality, currency and integrity must be monitored.

Key Principals

Focusing on SFA U’s organizational characteristics, key guiding principals can be defined:

- SFA U should operate under industry proven best practices as well as internally developed standards
  This ensures both compliance with Federal regulations, such as handicap accessibility, and nurtures best possible practice for the organization.
- SFA U should identify a Best Practices Team

This team will research new trends in learning and maintain the data in the SFA U intranet page to reflect changes in the industry’s best practices. Further detail concerning team responsibilities are listed in the next section.

- Best Practices are not only a Top Down process, but are often driven from every level of the organization
  This is an important part of the transformation of SFA U to a performance based organization.
- Team Members must actively support the process
  No change, however inherently good will work unless there is a ownership of the change within the organization.

SFA University Proposed Service Functions

The following section further identifies potential future roles as determined by SFA's individual characteristics and identified best practices.

Best Practices Team

Primary Services

One of the key principles is for SFA U to identify a Best Practices team. The team responsibilities should include the following services:

- Identifying current and emerging processes which reflect industry best practices which can be adopted by SFA
- Analyzing recommendations for process improvements from SFA and Business Partners
- Synthesizing and disseminating best practices to SFA
- Creating a climate which fosters two way communications concerning best practices throughout the organization
- Actively publicizing services and actively fostering teamwork with SFA employees
- Maintaining a close working relationship with CIO will be essential to ensure SFA's technology is able to support advances in training and development

Organization

In order to insure that the services associated with the Best Practices team will occur, team member roles and associated responsibilities must be identified. With this in mind, the team should be composed of best practice; sponsors, managers, and regional representative team members. These individual's responsibilities are outlined below:

- Best Practices Sponsor - Executive who provides overall guidance, direction and support for the Best Practices team
- Best Practices Manager- Coordinates the activities of the team members to best utilize the limited time each has to devote to the team
- Best Practices Regional Representative team members - One member from each region to perform independent research and analyze recommendations from the SFA community

Best Practices Components

Again, keeping best practices and SFA U's organization in mind the following components should be developed and maintained by the Best Practices team:

- Best Practices home page on Intranet
- A simple customer data submission interface
- An archive for out of date materials
- Creation of active communications vehicles
- Standardized review, acceptance and dissemination processes
- Creation of a discussion Forum

Internal SFA Services

Key Principals and Characteristics

Focusing on SFA U's organizational characteristics, key guiding principals can be defined:

- Close monitoring of employee training needs is required by the dynamic work environment rapid technology changes create
- The team works with the understanding that supervisors have neither the time nor training to perform skill and training needs training analyses
- The Internal Services team must work in partnership with SFA HR to create and implement skills and training needs assessment tools

Primary Services

Keeping the underlying principles in mind, the following services are to be provided by the Internal Services team:

- Analyzing job descriptions and duties to develop training curricula for each position, in partnership with SFA HR and SFA department leads
- Performing needs and gap analyses to determine what training opportunities are needed
- With Knowledge Managers, researching best methodology, vendor or virtual, to supply needed training
- Reviewing course evaluations to monitor quality, value and utility of courses
- Maintaining a close working relationship with SFA HR and all other SFA teams to be aware of changing position responsibilities necessitating curriculum modifications

Organization

In order to insure that the services associated with the Internal Services team can occur, team member roles and associated responsibilities must be identified. With this in mind, the team should be composed of internal services; sponsors, managers, and general support team members. These individual's responsibilities are outlined below:

- Internal Services Sponsor - Executive who provides overall guidance, direction and support for the Internal Services team
- Internal Services Manager
  - Directs the activities of the Internal Services team.
  - Works with department leads to develop training curricula for SFA employees.
  - Leads the needs assessment function and identifies training requirements based on job related curricula from those assessments.
- Internal Services Team Members - Performs needs assessments and assist in curricula development

Learning Needs Analysis

Key Principals and Characteristics

Employees are the most valuable assets in SFA University and can continually improve skills and performance when given the opportunity. A consistent, objective approach and common tools for conducting learning analysis must be used. All SFA employees (management and staff, all channels / functional areas) must be included with the approach, the needs assessment, and the actual training.

Primary Processes

The primary processes that will provide an opportunity for SFA University to continually improve skills and performance are listed below.

- Develop approach to conduct learning analysis.
- Select/Develop tools and procedures.
- Obtain approval & sign-off on approach, procedures & tools from stakeholders including training management, business partners, and the resources that will participate in learning analysis.
- Assess audience profile and document the findings by gather data on workforce numbers, location, skills & educational levels.
- Analyze data and group the workforce into logical audiences.
- Develop a summary document for the workforce profile.

After the requirements have been documented, they should be matched against the audience groups identified while assessing the audience profile. A complete profile of the requirements needed for each audience should be provided. An example segment of a Position Description (PD) and a Knowledge Skills Assessment (KSA) are provided in the next two pages. The PD displays the factors and levels desired for the employment position. The KSA displays the knowledge skills required and weight or level associated with the skill.

PD Example:

II. MAJOR DUTIES AND RESPONSIBILITIES-Position X

As a recognized expert, provides leadership in the evaluation, assessment and improvement of programs and management systems by applying a wide range of qualitative and quantitative techniques.

Formulates new program management standards and analytical approaches. Plans and directs the architecture for evaluation and measurement efforts which have broad and long-range impact.

III. FACTORS-Position X

Factor 1 - Knowledge Required FL 1-9 1850 POINTS

Mastery of program management and evaluation principles, concepts and techniques is required sufficient to provide leadership in the evaluation, assessment and improvement of programs and management systems.

Mastery of a wide range of qualitative and quantitative techniques for measuring effectiveness, efficiency and productivity of assigned programs. Utilizes this knowledge to formulate new program management standards and analytical approaches, and plan and direct the architecture for evaluation and measurement efforts.

KSA Example:

KSA	Weight
Knowledge and thorough understanding of Department of Education and Office of Student Financial Assistance operations, policies, programs, administrative procedures, and their interrelationships in order to (1) evaluate ongoing training and technical assistance needs of post-secondary institutional personnel, student aid client groups, and SFA staff and (2) formulate learning curriculum for external partners (3) and develop or revise materials for these partners	
Skill in planning, development, organization and management of projects	
Ability to schedule, coordinate and supervise the participation of staff in identifying and providing learning solutions to external partners and SFA staff (as needed)	
Skill in interpersonal communication, tact, and negotiation to build relationships between the SFA University and Student Financial Assistance organization units and external partners	

Note: Weights must total 10. The weight for any one item can range from 1.0 to 4.0 in increments of 0.5.

Points: 4 SUPERIOR knowledge is indicated by: Candidate must demonstrate extensive experience in several aspects of Department of Education and SFA operations. Such experience could have been gained in government agencies (local, state or Federal) or private firms which required conducting business with the Department of Education and SFA. Applicant's documentation indicates a substantive understanding of the laws, regulations, policies, and procedures related to Title IV. To be credited at the superior level, candidate's application should show direct experience with administration of such programs or involvement in development or supervision of the development of learning materials relating regulations, policies, procedures. Work history should demonstrate strong experience in evaluating training and technical assistance needs of multiple groups. Also, candidate must possess extensive experience in formulating learning curriculum from the needs identified and offering learning solutions. Finally, candidate must possess expert skill and ability in developing and revising learning materials to meet the learning requirements.

By viewing the PD and KSA for each position, a complete assessment of needs, as defined in the next section, can be defined for each member of the audience.

Assess Training Needs

Training needs examine and define the skills of the current workforce and compare those skills with those needed to support new tasks within the organization. Training needs can exist for those new to the organization, but should be conducted for all in the organization. By identifying and acting on these needs, effective training is built for continuous learning. By following these steps training needs within an organization can be determined:

- Identify and Document Training Events (Training events refer to the high-level changes, or driving situations that drive the need for training, such as systems or procedural changes.
- Identify and Document Performance Requirements for each training event. Performance requirements represent logical units of work that must be completed. The performance requirements will dictate needs for each audience, and will drive the curriculum planning effort.
- Identify which audiences will require training for each requirement.
- Identify Performance and Training Related Gaps.
- Conduct a training gap analysis to identify and assess the gaps between current performance, and required performance for each training requirement.
- Determine the level of knowledge required for each training requirement in order to successfully meet the training objectives.
- Identify current level of knowledge through surveys, skills assessments or focus groups.
- Identify gaps in level of knowledge for all audiences involved.
- Determine possible causes of the gaps, such as poor information access, poor existing training, etc.
- Determine which needs are training needs (requires specific training), or non-training related (can be addressed through communications, or another form of information transfer.
- Determine training timing, immediately or which can be addressed in the future.
- Develop Summary Document of learning analysis.
- The learning analysis should be documented in the training contract for review and sign off with business partners.
- Identify Opportunities.

Shifting training and support from Traditional to Performance Based

Because SFA University is moving to a performance based organization, examining learning needs under a performance based framework better enables the connection between skill building and performance based learning to be created. The comparison below, of the two organizational frameworks, defines the knowledge needs for each.

Traditional	Performance Based
What do users need to know? • Lectures & "information dumps" • Passive learning • Little practice or application • One time "event"	What do users need to do to perform their jobs? • Active learning • Hands-on practice and application • Continuous learning • Build proficiency quickly

The shift from a traditional to a performance based organizational model is marked by a shift in the focus of learning. Passive and isolated training events are replaced with an understanding of learning as an ongoing process. This ongoing learning cycle starts with training to build skills for a given task. Performing the specified task while trying to avoid errors follows. Measuring performance to seek potential improvements and benchmarking against proven practices is the next stage often referred to as "innovating". Once gaps for improvement have been identified, the learning cycle begins again with training. This proactive model, when fully integrated into an organizational culture, nurtures continual performance improvement.

Solution Delivery

Key Principals and Characteristics

Best in business organizations constantly strive to identify, test and implement emerging methods of training delivery. Companies from all industries invest significant amounts of time and resources to explore new models and to review leading edge methods offered by front line training providers.

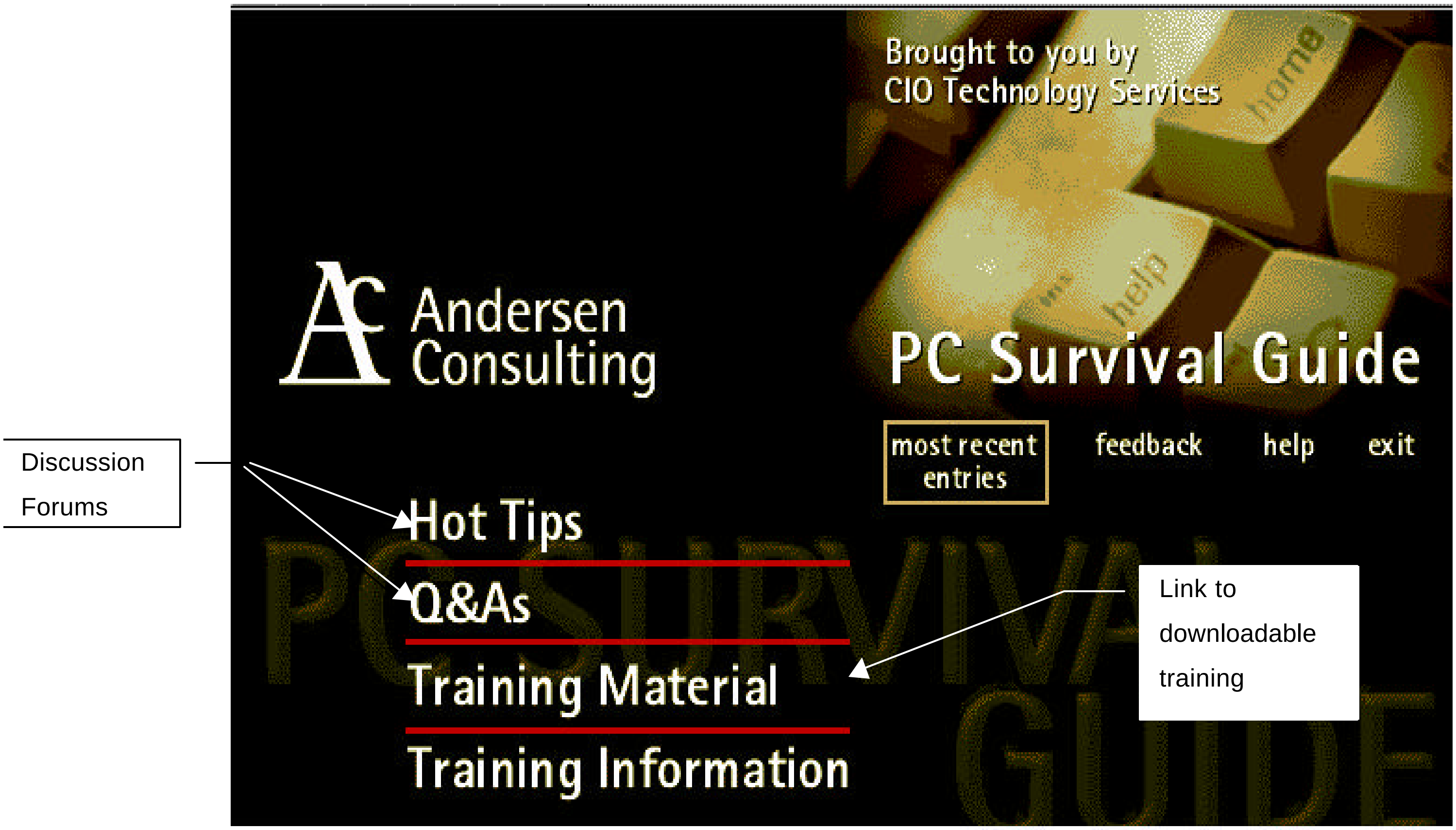
New companies are forming everyday with innovative strategies to create and deliver training to businesses. One such firm, Ninth House, Inc (www.ninthhouse.com) , exemplifies the new generation of training companies thinking with its vision of interactive lessons, desktop access, and cutting-edge content. Ninth House also promises a collaborative environment where critical business skills are learned through experience, not lecture. The firm eschews accepted e-learning methods, providing instead a variety of different vehicles to transfer knowledge. Ninth House uses methods such as storytelling, virtual mentors and on line role playing to deliver their training over the internet via broad band access.

Other, more established firms are also undergoing a training strategy transformation . Andersen Consulting, which has long had a corporate university in St. Charles, IL, now offers an ever increasing percentage of it's core internal training courses in a virtual format using the internet, telephone and e-mail as the medium for delivery. Courses, which traditionally necessitated participants traveling to St. Charles for one or two weeks, are now held over several weeks. Participants "attend" by pre-reading materials sent to them via e-mail, joining in on conference calls with their classmates and performing tasks based on materials they access via the internet. Other major companies are also using the same combination of mixed media to present new learning experiences to their workforces which may be spread around the globe.

The challenge is to learn of cutting edge training ideas quickly. Companies have been creating new positions within their training or IT organizations to perform research on emerging technologies and methodologies. The majority of these researchers accomplish this task as a side job or additional duty. Since many of the newest trends in training are first found on the internet search engines such as yahoo.com, excite.com and google.com, they can be used to perform fast, powerful samplings of new training trends and technologies. Additionally, many organizations such as American Society of Training and Development (www.astd.org) and Learnativity.com (www.learnativity.com) provide regular reviews of new training practices and offerings.

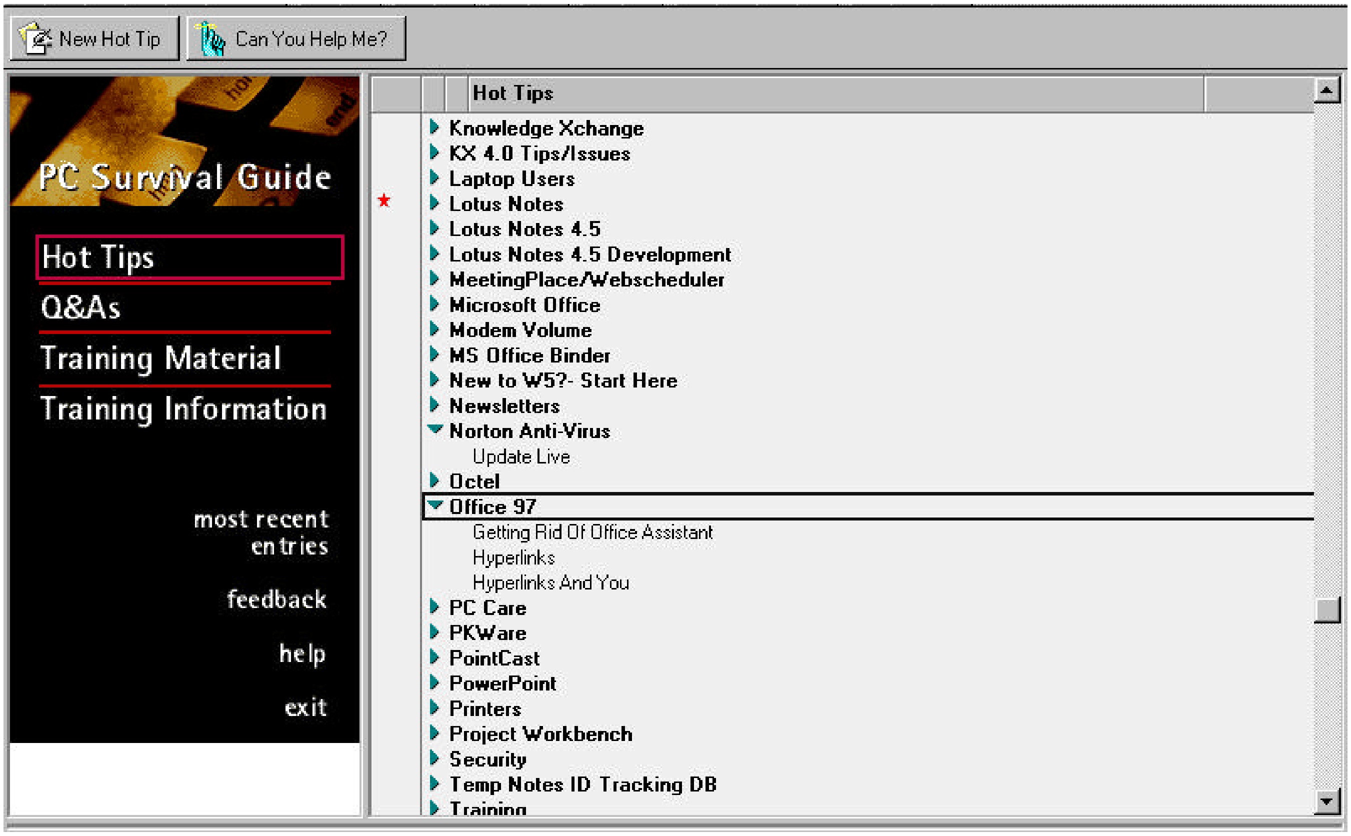
As SFA University matures and it's training program grows, distance learning and other non traditional methods of training will become a more viable option for delivering information and guidance to a geographically dispersed audience.

Sample On-line Storage



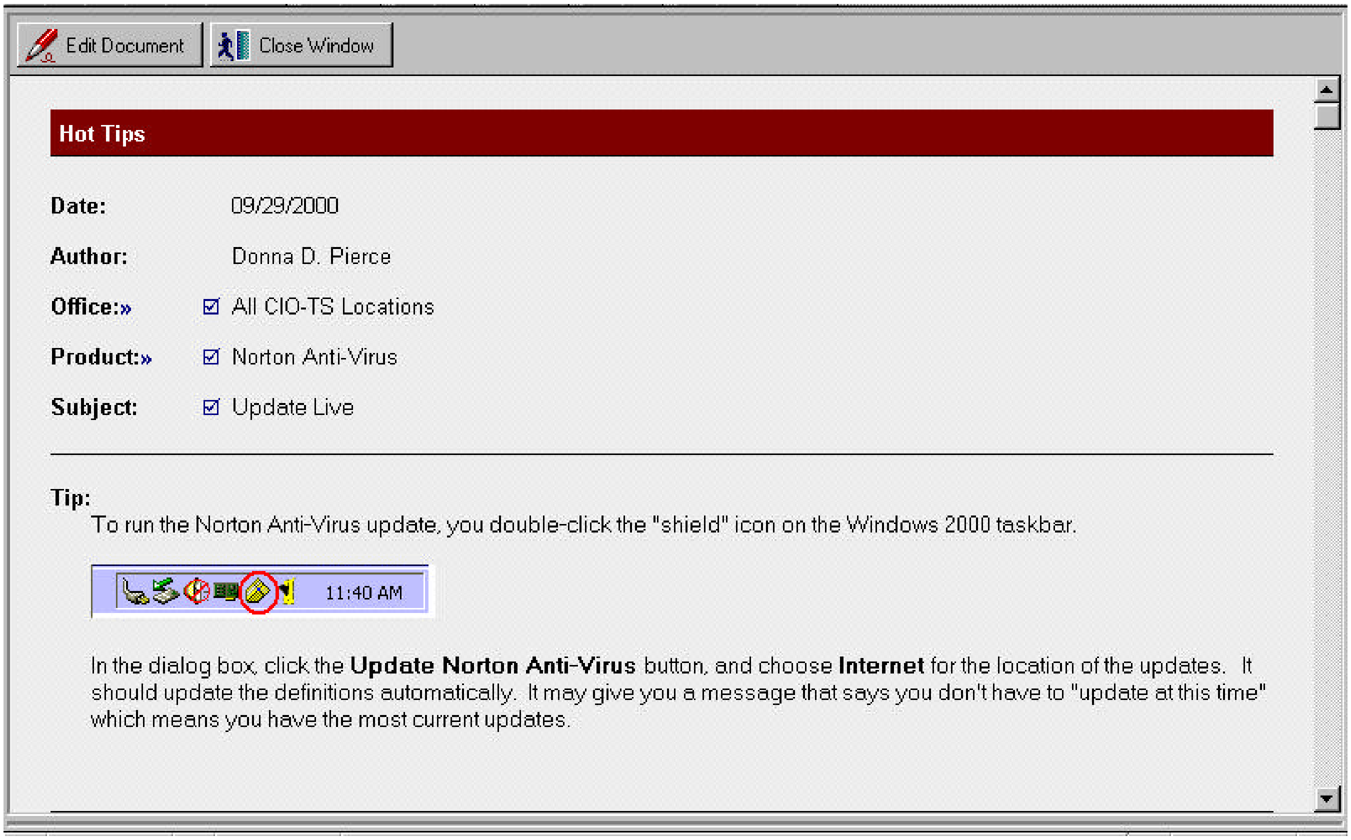
From Andersen Consulting **Knowledge Xchange®**

The next six pages represent screens from an on-line repository which allow authorized users access to databases enabling them to offer or receive assistance from both corporate university officials and colleagues. The home page above acts as a navigation page with links to content pages.

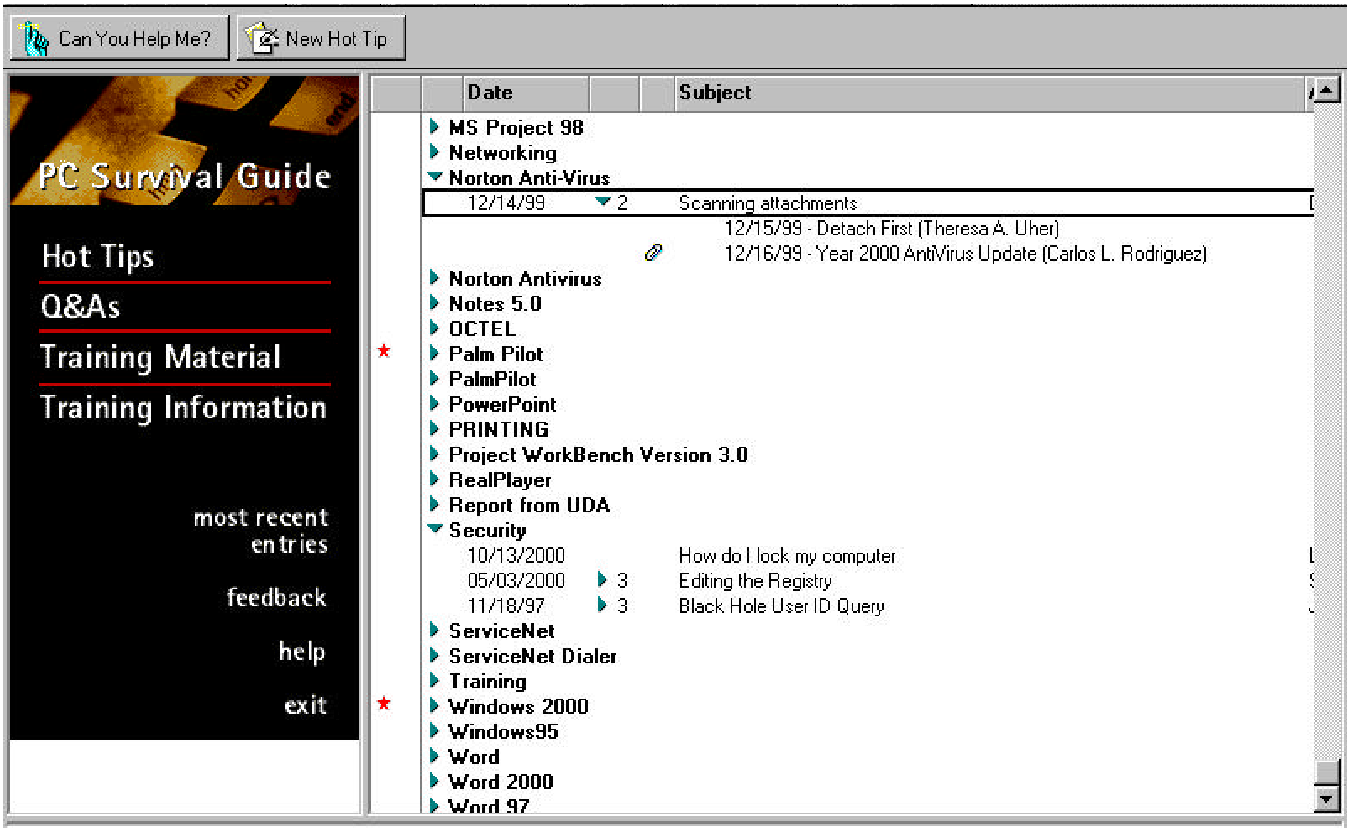


Selecting the Hot Tips category enables users to access an area of the database where they can provide help to colleagues on any number of, in this case, software programs.

Notice that buttons at the top of each screen allow easy movement to other screens for posting or viewing items of interest to the user.



Users can open the “Hot Tips” created by others to get helpful information on programs used by the organization.



Another area in the database enables users to post specific questions. Answers are provided by designated specialists in various areas or, if desired, anyone who can resolve the issue. Question and answer databases such as this should be monitored to insure the answers provided are accurate.

Edit Document | Respond | Close Window

Can You Help Me?

Date: 12/14/99

Author: Daniel T. Manata

Office: ☑ All CIO-TS Locations

Product: ☑ Norton Anti-Virus

Subject: ☑ Scanning attachments

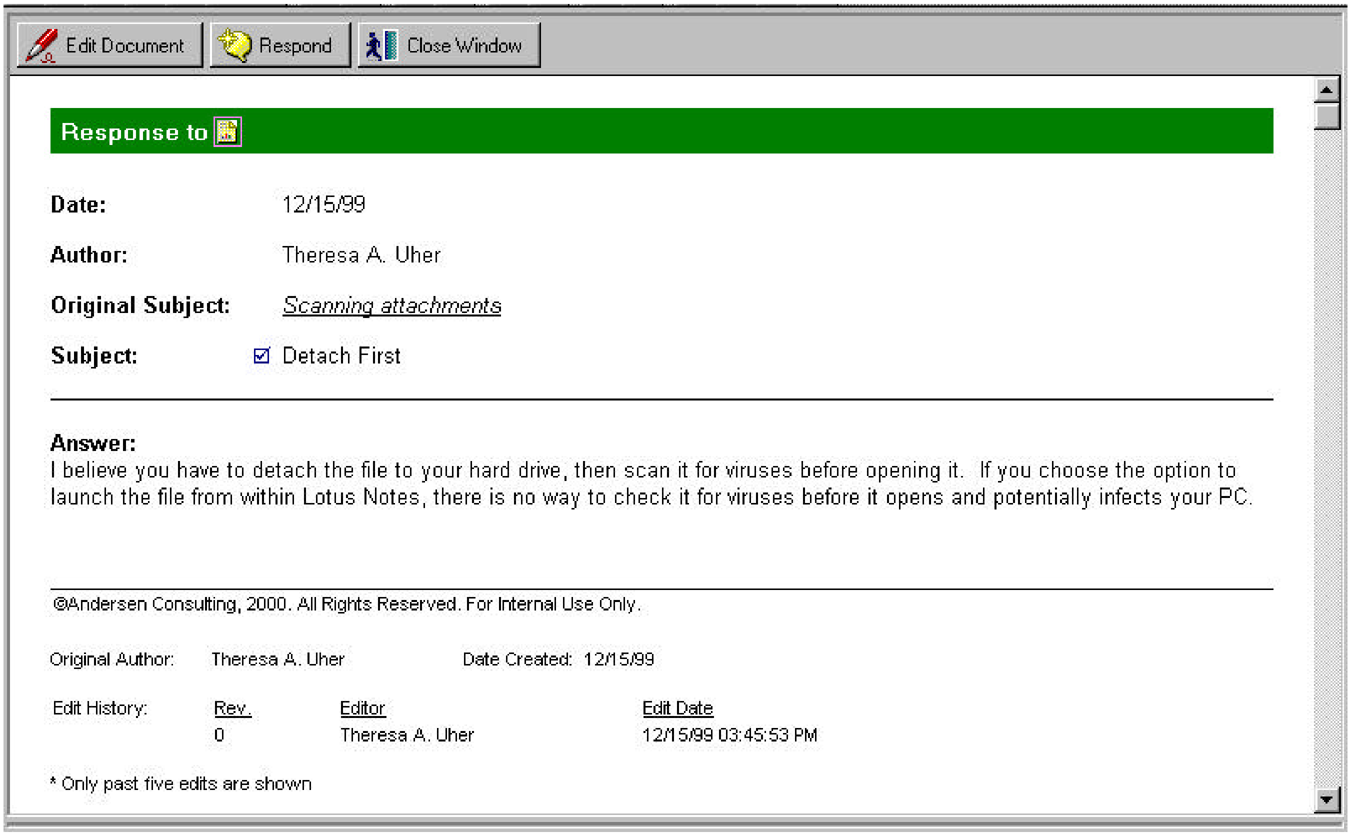
Question:
Many of the Y2K notes are suggesting to scan attachments for viruses before launching. How do you do this? Scanning after detaching is easy, it is while the item is still not detached that is the issue.

Original Author: Daniel T. Manata Date Created: 12/14/99

Edit History:

Rev.	Editor	Edit Date
1	Daniel T. Manata	12/14/99 03:32:07 PM

This question was submitted by a user on December 14, 1999.



Edit Document | Respond | Close Window

Response to

Date: 12/15/99

Author: Theresa A. Uher

Original Subject: *Scanning attachments*

Subject: ☑ Detach First

Answer:
I believe you have to detach the file to your hard drive, then scan it for viruses before opening it. If you choose the option to launch the file from within Lotus Notes, there is no way to check it for viruses before it opens and potentially infects your PC.

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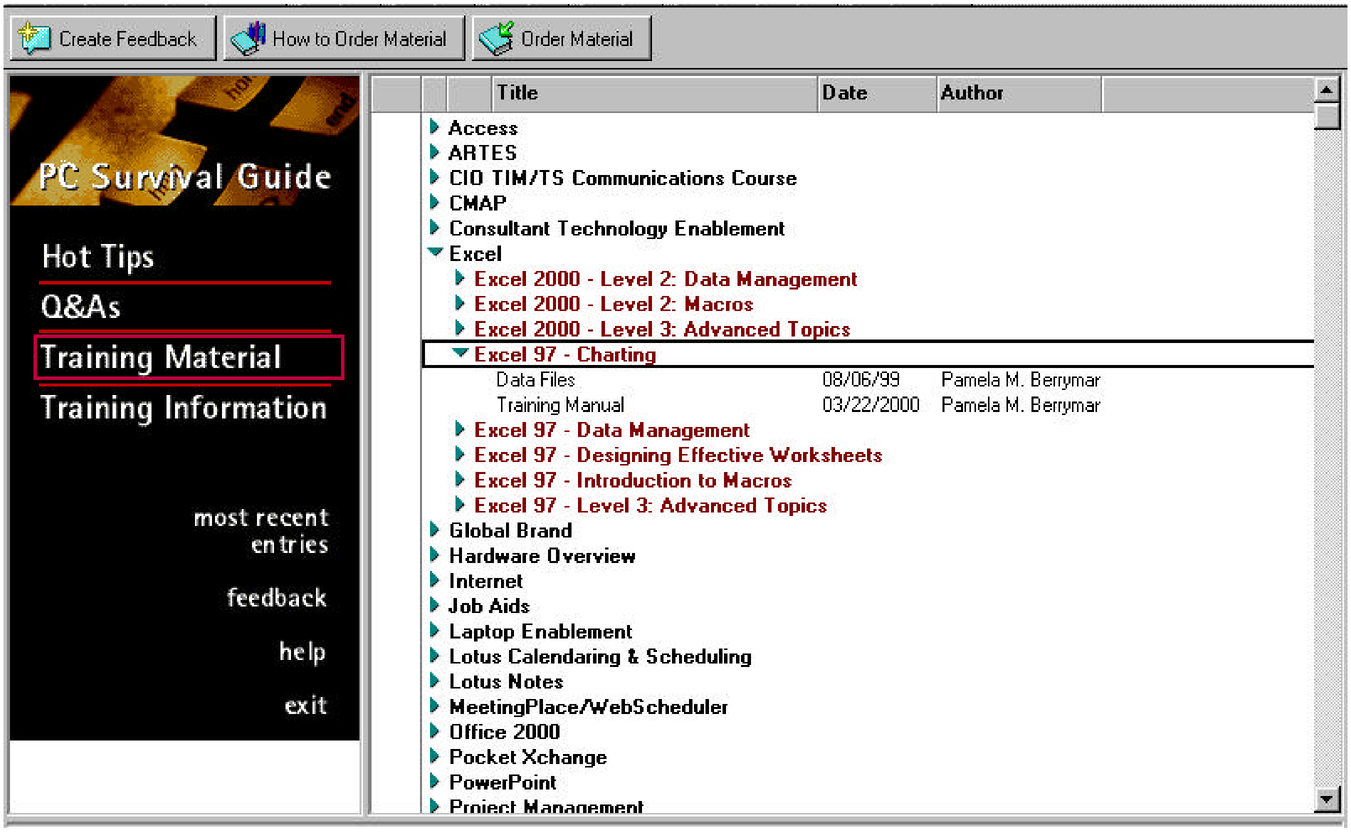
Original Author: Theresa A. Uher   Date Created: 12/15/99

Edit History:	Rev.	Editor	Edit Date
	0	Theresa A. Uher	12/15/99 03:45:53 PM

* Only past five edits are shown

A reply was posted to the previous question the next day. Often, questions in this particular database are answered within hours of being posted.



Internally developed training materials are also posted to the database to provide easy access by users who may not be able to attend live classes.

The Training Information section of the database provides users with information on upcoming class schedules and links to vendor offered courses of general interest to the organization.

Internet Site Samples

www.disneyuniversity.com

Disney University; demonstrates relationship of Disney offered courses and other site information.

www.amanet.org

American Management Association; demonstrates relating training offerings, resources and class registration.

http://www.ntu.edu/

National Technological University; demonstrates multi-sectioned web design with intuitive navigation links to the user's desired information.

www.actden.com

actden; a free online site for tutorials and online courses. Demonstrates online repository and catalog set-up along with dynamic navigational components.

www.free-ed.net

Free-ed; free courses and tutorials on the internet. Demonstrates master and sub-course catalogs along with module table of contents.

www.computersandtraining.com

Computers and Training; free online learning for computer concepts and coding. Demonstrates sample course catalog.

www.motorola.com

Motorola; online training for members of Motorola Applications Global Network (MAGNET). Demonstrates login functionality, directory and applications repository.

www.centra.com

Centra; online Live eLearning and Collaboration. Demonstrates online repository.

Below is a list of companies that position learning as a priority. Their internet sites allow access to this learning through both registration and information on course offerings. Included with this list is an eLearning Matrix that displays characteristics of websites focused primarily on eLearning. This matrix displays the use of online repositories, catalogs, and evaluation systems.

		eLearning Best Practices			
eLearning site	**Directory**	**Catalog**	**Repository**	**Evaluations**	**Online Help**
actden.com	No directory.	Yes, a catalog within each tutorial separating all tutorials. Gives access to the home page, and the teacher's guide for the selected course. Also contains the table of contents for each course.	Yes, a visual .gif catalog of tutorials and online courses.	No evaluations listed. A <Contact Us> section exists only for suggestions about the site.	No online help.
centra.com	No directory.	Yes, a list of courses are in a catalog. The courses are defined by course number and grouped by employment position.	Yes, separate repositories of events, educational programs, and courses are offered.	No evaluations listed.	Yes, questions about the courses and course content.
computersandtraining.com	Yes. Directory of other sites according to desired course.	Yes, a catalog of courses is offered.	No self contained repository.	No evaluations listed.	No online help.
free-ed.net	No directory.	Yes, a general course catalog and technical course catalog.	Yes, a repository of each college and learning content within each college.	No evaluations listed. A <Contact Us> link goes to the Web Master.	Yes, section for first-time visitors, FAQ and questions about the courses and course content.
motorola.com	Yes, for networking between developers and those desiring pre-developed applications.	Yes, a list of presentations according to original date are presented.	Yes, a repository for development applications.	No evaluations listed, a <Contact Us> link goes to the Web Master.	No online help.

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