



**Modernization Partner Working Session Summary #1
Modernization Support
Conducted December 19, 2000**

**Summary Notes
Purpose**

- To recount the working session results from the Straw Model Operating Guidelines working session.

Session Participants

Participants:

- Beth Arbogast
- Daniel Boulton
- Scarlett Brock
- Len Clark
- Alycia Crabtree
- Dinah Nelson
- Roger Pleasanton
- Mike Ramos
- Anne Teresa
- Vicki Wilson

Process Discussion

- Discuss how the business model chosen accurately represents SFA
- Discuss the recommended strategy for SFA
- Identify possible elements from other strategies to include
- Identify other functionalities which have not been listed in the document
- Examine proposed future roles and responsibilities
- Identify additional team members
- Determine a schedule for future working sessions



Discussion Results

- The low Cost Consistency Model was suggested to represent SFA, however; SFA U is modeled more toward the Teaming and/or Cross Functional Model. Further discussion will occur to decide whether we will use the Teaming Model, Functional Model, or a combination of both.
- The two strategies that connect with the business models are
 - Teaming Model
 - Creates a network structure facilitating team work
 - Specific training facilitating new competencies and team work
 - Strong communication tools
 - Cross Functional Model
 - Structure facilitating teamwork
 - Specific training programs to create a common frame
 - Strong communication tools
 - Incorporates knowledge processes
- SFA U specific business requirements will drive the building of the following Knowledge Management tools.
 - Electronic library
 - Electronic course catalog
 - Databases
 - Web search capability
 - Electronic registration
 - Enterprise wide user tracking
 - Course feedback capacity
 - Electronic calendars
 - Web based learning
 - Human capacity
- Additional team members (with the role of point people for their channel) will be requested by Anne at the January 11 meeting. The point people will be available to answer questions on an as-needed basis.
- The next working session will be held Thursday, January 11 at 2:00.

Next Steps

- Future roles and responsibilities will be covered in further detail in a future working session.
- Create a request of managers to specify functionality that they would like Knowledge Management to address.
- Introduce details of Knowledge Management at the Manager Meeting January 8, 2001.
- Anne will request point people from each channel during a meeting scheduled Thursday January 11, 2001.



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- A follow-up e-mail message will be created to encourage each channel to designate point people to work with the SFA Knowledge Management team on an as-needed basis.

Issues/Concerns

- No issues or concerns were identified for the next working session.



**Modernization Partner Working Session Summary #2
Modernization Support
Conducted January 11, 2001**

**Summary Notes
Purpose**

- To recount the working session results from the Strategy Designation working session.

Session Participants

Participants:

- Scarlett Brock
- Terry Brooks
- Len Clark
- Alycia Crabtree
- Dinah Nelson
- Mike Ramos
- Vicki Wilson

Process Discussion

- Review results from the Manager Knowledge Management request
- Define the phases of SFA U Knowledge Management
- Review how the business model chosen accurately represents SFA
- Review the recommended strategy for SFA
- Identify possible elements from other strategies to include



Discussion Results

- Results from the manager request will be incorporated into the tools designation.
- Further discussion occurred to define whether the SFA U Knowledge Management would use only the Teaming Model or components of the Low Cost Consistency Model.
- The two strategies that connect with the business models are:
 - Teaming Model
 - Creates a network structure facilitating team work
 - Specific training facilitating new competencies and team work
 - Strong communication tools
 - Cross Functional Model
 - Structure facilitating teamwork
 - Specific training programs to create a common frame
 - Strong communication tools
 - Incorporates knowledge processes
- The teaming model alone will serve as SFA U's model and strategy.
- Additional members from each channel will not be designated to be available to answer questions on an as-needed basis.

Next Steps

- Alycia, Connie, and Dinah will meet before the next working session meeting to discuss the objectives for SFA U knowledge management created months prior. These objectives will be modified and correspond to the Teaming Strategy.
- A member from the portals project will discuss with the group the impact of the portals effort on SFA U Knowledge Management.

Issues/Concerns

- No issues or concerns were identified for the next working session.



**Modernization Partner Working Session Summary #3
Modernization Support
Conducted January 16, 2001**

**Summary Notes
Purpose**

- To review objectives for SFA U Knowledge Management.
- To define Success Factors for SFA U Knowledge Management.

Session Participants

Participants:

- Len Clark
- Ed Cole
- Alycia Crabtree
- Mike Ramos
- Connie Raley
- Vicki Wilson

Process Discussion

- Discuss with a member from the portal project the impact of the portal effort on SFA U Knowledge Management
- Review best practice success factors originally viewed in the Straw model Operating Guidelines
- Define success factors for SFA U Knowledge Management
- Review desired materials for SFA U Knowledge Management
- Present table of desired material and request Fields, Steps, Organizational Requirements, and Functional Requirements



Discussion Results

- Ed Cole, the IPT contact, gave an overview of the Portal project and pointed the group toward viewing the school channel portal that will be used as a preliminary template for the portal project.
- The success factors were defined as:
 - Having a hits counter that will denote site usage amounts
 - Having high survey results for the objectives of the site. The plan is to have an initial survey to ask what would the employees like to see and a back-end survey to solicit information on whether they received the information that was needed
 - A tool such as Web Trends would like to be used to list what viewers are requesting while on the site
- The previous success factors will address the following desired functionality. The desired functionality was originally defined by the SFA U Knowledge Management team in August.
 - Create a database that will collect all information pertaining to national training workshops
 - Create Web pages to house the Knowledge Management's library of training information for OSFAP
 - Create evaluation form to be used with national training
 - Create Web pages that will house the Knowledge Management's library of technical resource information for OSFAP
 - Create library of training materials on Website

Next Steps

- Ed will try to gain the basic portal requirements from Sandy McCabe and will report by the next session.
- Order the importance of each of the functions for Ed to discuss with the Portal project.
- Add additional desires to the desired materials list that may not have been addressed during previous meetings.
- Complete the preliminary table of desired materials and fields, steps, organizational requirements, and functional requirements to be discussed in the next meeting.

Issues/Concerns

- One issue surfaced: to obtain requirements for that may exist for future links to the Portal and to obtain any existing functional requirements for software. Currently the requirements are undefined.



**Modernization Partner Working Session Summary #4
Modernization Support
Conducted January 23, 2001**

**Summary Notes
Purpose**

- To review the Knowledge Management manager requests submitted in the January 8, 2001 SFA U manager meeting.
- To review and define material sources and processes for SFA U Knowledge Management.

Session Participants

Participants:

- Terry Brooks
- Len Clark
- Alycia Crabtree
- Dinah Nelson
- Mike Ramos
- Vicki Wilson

Process Discussion

- Review results from the Manager Knowledge Management request
- Define the critical elements and functional requirements for the system



Discussion Results

- The following manager requests were discussed in more detail.
 - Customer database- a customer database does not currently exist for SFA employees, but could perhaps be addressed once the specific need for a customer database is identified.
 - Customer satisfaction data for internal and external training-currently surveys exist online for employees to complete; however, the site is rarely accessed and employees do not access the site to complete surveys. Better response to surveys come in hard copy form given at the end of the training course.
 - Connection to TRAINS.
 - Learning coupon-advertisements for SFA U's system should also include mention of the learning coupon. Within the design of the system, there should be a link for SFA U's page to the learning coupon.
- The following desired materials and functionalities were confirmed for SFA U's system.
 - Course Catalog
 - Central repository for learning materials
 - Maintain intranet registration site
 - Database of national training for employees
 - Database of national training for schools
 - Maintain training request survey
 - Create and maintain evaluation form
 - Reports generation
 - Training searches
 - Usage tracking
- The following table identifies the organizational requirements, critical elements and functional requirements that SFA U has defined.

Organizational Requirements	Critical Elements	Functional Requirements
1) Create and Maintain a Web site for SFA University's Library of Training and Technical Resource Information	A. Create and Maintain national vendor training sites offered on the Internet	a. Create Electronic Class Cataloging (for employees only)
		b. Determine and designate search engine to be used for training requests



Organizational Requirements	Critical Elements	Functional Requirements
		c. Ensure compliance with Section 508 (disability accessibility)
		d. Create a usage tracking device for vendor training offered
	B. Store and maintain the Central Repository of SFA technical resource materials	a. Determine methods for electronic storage of materials
		b. Determine materials to be stored electronically
		c. Determine data to be stored electronically
	C. Create course catalog for SFA U training available (CBT courses)	a. Offer Computer Based Training –CBT
		b. Offer SFA Video Conference Training (expectation that the video will go online, webcast)
		c. Create electronic calendaring (to display SFA U training)
	D. Create and maintain additional Web-designed functions	a. Create “Announcement Section” for training news information
		b. Maintain and process electronic Training Request Survey
		c. Maintain and process Customer Evaluations



Organizational Requirements	Critical Elements	Functional Requirements
		d. Forward Customer Suggestions and requests to SFAU Knowledge Management Administrative Console
		e. Usage tracking - counter for page usage
		f. Maintain Help line (operates like a Contact Us page with messages sent to a shared email address)
		h. Create Administrative Console to upgrade and update features, and to generate reports on the Web site.

Organizational Requirements	Critical Elements	Functional Requirements
2) Maintain the SFA University Intranet Registration site for SFA Employees	A. Confirm Registration of SFA U courses electronically (confirmations will be sent to registering email address and may not be participant email address)	a. Electronic confirmations must provide training location, room assignment, directions, time, and date
		b. Offer Cancellation and Re-registration
	B. Determine and designate search engine to be used for registration requests	a. Assign rooms randomly (the page should have a radio button to select whether or not a room can be assigned) dxz, track cancellations, and send email reminder of training
		b. Generate reports -
		c. Compute number of total registrants



Organizational Requirements	Critical Elements	Functional Requirements
		d. Compute % Of Registrants by Channel, and Channel in a region
		e. Compute Number of Registrants by Region
		f. Identify Core Curriculum Registrants
		g. Identify Special Accommodations
		h. Generate Certificates and name tags
		i. Generate a query by Date
		j. A link to internet maps and searches for hotels should be included
	C. Ensure compliance with Section 508 (disability accessibility)	a. Maintain and Process Customer Suggestions/ requests for Help (link to a Contact Us page for customers to send an email)
	D. Provide mechanism for Electronic Signature of Course Participants	a. Have electronic sign-in available at each course



Organizational Requirements	Critical Elements	Functional Requirements
3) Maintain Data Collection and Reports Generation	A. Maintain Course Feedback- from Participants, Facilitators, Logistics Coordinators, Managers, and Observers	a. Using electronic evaluations, generate graphs of data using total number of persons trained (regional staff and headquarters), etc. (information should be gathered in both graph and text format)
		b. Compile data of number of workshops – by course title, course number, location (region and channel) and date (manager query capability should exist)
		c. Compile Customer comments and suggestions from Administrative console
		d. Generate amount of Training offered – SFA U, Video Conferences, Coach, CBT
		e. Compile data of attendees by region, channel, sites, course total, and annual total
		f. Interface with TDC TRAINS SERVER and Human Resources
		g. Interface with HR Skills Assessment Software
	B. Create Annual Report	a. Provide Cost Analysis (people attended/development costs)
	C. Create data base to collect all information pertaining to national training workshops	a. Generate and Compile data of number of workshops – by course title, course number, location, date, and number of attendees (retrieved from registration database)



Next Steps

- In order to respond to the request of a customer database, Vicki will define “customer” with the management team.
- Additional CIO recommendations should be identified for each of the functional requirements.