



Memorandum

To: Anne Teresa, SFA

From: Howard Weitzner, Accenture

Date: December 31, 2001

Subject: Deliverable 29.4.1c Training Services Summary

Purpose

This memo summarizes the results of Training Services provided to SFA University during the period December 1 – December 31, 2001. The results were delivered through supporting materials and working sessions with SFA University staff. The work effort addressed improvements to SFA University's training services, processes and systems.

Initiatives this Period

Specific initiatives addressed during this period included:

- SFA University strategic planning and organization development
- Training development and delivery methodology/process team
- Delivery cost assessment
- Learning Consultant role definition and development
- Needs assessment
- Effective teams
- Project management

Planned Initiatives

During the period January 1 – January 31, 2001, the following initiatives may be addressed, but not limited to:

- SFA University strategic planning and organization development
- Training development and delivery methodology/process team
- Delivery cost assessment
- Development of the Learning Consultant role and capabilities
- Needs assessment
- Effective teams
- Manager development and performance support assistance
- TDC Support
- Project Management

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Description of Initiatives

SFA University strategic planning and organization development

Underlying other initiatives in this area is ongoing support for SFA University's efforts to develop and enhance its organization. Specific activities this period included:

- Ongoing support in enacting action plans
- Facilitating cooperative partnership with Financial Partners channel
- Scoping and collection of operating partners' orientation materials for development of a standardized program

SFA managers are addressing goals and roles as outlined in the action plans for their respective areas. These plans outline planned initiatives and corresponding staffing needs. During this process, activities included supporting each team to finalize their action plans and scope the work for each team. This support is ongoing, as each team begins work and completes major segments of work.

The team has gathered data regarding a high-level orientation that would be targeted to non-SFA personnel, such as contractors and operating partners. It would address the following needs: business overview of SFA by non-SFA personnel at ED, including the IG; reinforcement of SFA PBO culture and business priorities to carry on the momentum from F2B, Traditions, and PBO at the Front Lines; and orientation materials for new-SFA employees and contractors.

Training development and delivery methodology/Process team

The Training Development and Delivery team supports the creation and implementation of best practices for how SFA University develops and delivers training. The methodology (Plan It, Design It, Build It, Do It, Assess It) follows a customized version of the ADDIE model (Analysis, Design, Develop, Implement, Evaluate).

During this period, the team continued to modify and review documents for the Plan It and Design It phases of the training development process. This work has been conducted in pairs, as established in the previous month's meetings. These pairs continue to work together to determine approach, refine templates, and simplify materials. On an on-going basis, the entire team gathers each week for a status update, at which time progress from each pair is shared with the larger group.

Currently, the team continues to develop the detailed materials to support the training teams use of the methodology. Specific activities during this past work period included:

- Refinement of the "Gantt" chart detailing the timing and coordination of tasks
- Development and refinement of materials for the Plan It! phase
- Development and refinement of materials for the Design It! phase

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The next phases of work will include:

- Completion of the Plan It! and Design It! phase deliverables
- Initial development of the Build It! phase approach and materials
- Support of Spring Training / COD team during course design process
- Initial development of materials for introducing the process to training teams

The team has identified the following milestones:

- Plan It documents ready for review by January 6, 2002
- Design It documents ready for review by January 6, 2002
- Framework for Built It prepared by February 1, 2002

Delivery cost assessment

An initial analysis of course information from SFA University's 1999 Annual Report on Training has identified opportunities to reduce the costs of delivering training either through alternative delivery channels or revisions to training contracts. Preliminary results were reviewed and the need was identified to conduct a delivery cost assessment of which courses to target for cost reduction.

Throughout December, the team has selected and compiled the appropriate training development and delivery cost and summary drivers. Fiscal Management Training (FMT) will be the pilot course for analysis. Through this effort, the cost analysis team seeks to also consistently capture accurate audience size. Activities during this period included:

- Confirmation of the project approach
- Identification and documentation of cost drivers
- Development of the cost analysis model
- Selection of the pilot course for analysis

Specific activities in the next period will include:

- Continued development and customization of the cost analysis model
- Development of reporting and analysis procedures
- Identification of the communications required to deploy the cost analysis model
- Detailed research of the costs of one course and identification of the related process and tools

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Learning Consultant Role Development

During this period, the Learning Consultant role was further defined and developed. Within the Service Delivery Model, the Learning Consultant serves as the link between SFA University and other areas within SFA. A primary component of this position is assessing the needs of customers, through which the Learning Consultant will leverage the work done by the needs assessment team. To address the identified performance needs, the Learning Consultant will work with service providers within SFA U. who may, in turn, contact external service providers (vendors) to customize solutions.

Needs Assessment

In cooperation with the Learning Consultant development, the needs assessment project has begun to define its scope, determine methods of measuring needs, and identify corresponding business goals. Specific activities in the next period may include:

- Gathering ideas on tool/process/approach for needs assessment
- Researching existing needs assessment tools/approaches
- Identifying industry data as reference

Effective Teams

The “Effective Teams” project commenced, with a focus on improving facilitation and decision making, heightening accountability, and improving efficiency. Over the next few months, this will be achieved through four modules: facilitative leadership, project planning, project management, and team building. Initial activities this period included:

- Observed and documented SFA University meeting processes and reported findings to management team
- Provided feedback to SFA director on potential tools SFA U could implement to increase team efficiency, creativity and accountability

Project Management

Project management support continues to be provided to assist SFA University formalize the role of its project managers. This information identifies the role, tasks and tools an SFA University project manager will leverage. Future activities may include meeting and workgroup facilitation.

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Observations/Recommendations

During the period December 1 – December 31, the following observations were identified and will be reviewed to determine the potential impact/value for SFA University:

- The new standard training process could be introduced to teams prior to application by the team for course development. Given the link between this concept and the current SFA University program for Training Development and Delivery, these two sessions could potentially be linked. This would allow attendees to focus on their area of need, be it training development (such as instructional design) or training delivery (such as facilitation skills).
- To best utilize resources, a training strategy could be implemented annually. This effort would plot courses over the year, balancing development and delivery needs with available resources. Such planning supports needs assessment and cost analysis efforts by choosing projects that address important business goals.
- The Training Process Team and the LMS team are piloting the use of eProject, a web-based project management and team collaboration site. Using this tool through Mod Partner, team members can access project information, share documents, and collaborate on project status. It also allows for version control, which automatically archives previous document versions. As additional training teams are created, this tool could enable and facilitate collaborative work despite distance or different work environments.

Attachments:

- Training Process Team materials
 - Progress Matrix
 - Updated Gantt chart
 - Updated Plan It materials
 - Updated Design It outline
- Cost Analysis materials
 - Cost Drivers
- Learning Consultant
 - Learning Consultant overview
- Effective Teams
 - Effective Teams overview