



**Department of Education
Office of Student Financial Assistance**

**Deliverable 31.3.2
Learning Consultant Definition**

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1. Executive Summary

As SFA University develops its capabilities to assess training needs and deliver training to the organization, it will also develop the role of Learning Consultants. Learning Consultants are SFA University staff members who support specific channels or enterprise units by identifying training needs and recommending solutions to improve competency through training.

To enhance the success of learning consultants, SFA University will conduct working sessions to further design and develop their role. This will involve defining the skills and competencies associated with the position, researching possible approaches to fulfilling this role, providing coaching to existing Learning Consultants, and planning future activities to support this endeavor.

This document includes planning resources for this effort. Among these, there are materials for an initial working session, including an agenda and presentation of research findings. Also included is a draft of the conceptual design for the Learning Consultant role, including a basic role description. Lastly, this document includes an action plan for proceeding with the design of the Learning Consultant role, including elements of proposed competency development and rollout of the program to SFA's channels and business units.

2. Working session

In an initial working session, the team reviewed original design documents for SFA University and the relationships of a Learning Consultant to his or her assigned channel or business unit.

The materials included in this session provided a basis for discussion of the Learning Consultant role. In general, the framework reviewed the role at its inception, considered its current state, and anticipated its evolution in the future in the form of an action plan.

To this end, this section includes descriptions of the original concept, focusing on functions, responsibilities, and an illustrative scenario depicting a hypothetical working relationship in which the Learning Consultant assists a channel or business unit. The current process recapped a recent interview with current Learning Consultants in a visual format. Lastly, elements for the creation of an action plan and its corresponding components, such as approach and level of effort, were considered.

Appendix A includes a copy of the working session materials.



3. Conceptual design

The conceptual design for the Learning Consultant offers a basic illustration of the Service Delivery Model and an introductory description of the roles and responsibilities involved. As this role develops in the organization, its detailed responsibilities will evolve. Each Learning Consultant will cater to the channel or business unit to which he or she is linked, thereby adapting techniques and approaches to suit specific situations. That said, its core purpose is as follows:

The Learning Consultant will support the needs of the channel or business unit to identify training needs and recommend solutions to improve competency through training and performance support. Learning Consultants will be SFA University staff assigned to each channel or business unit. Through working sessions, SFA University will further design this role and define its associated competencies.

Appendix B includes the Service Delivery System model and basic overview of the initial roles and responsibilities. These elementary items will be further developed through the initiatives on the action plan.

4. Action plan

What is an Action Plan?

Once an organization's needs and available resources have been identified, the organization must recommend an Action Plan to fill the gaps. The Action Plan documents clear and specific objectives and activities for the implementation of a specific change.

An Action Plan is a management tool to facilitate, support, and promote the change or initiative. It enables the organization to understand their role in achieving the required commitment to the change, and outlines the actions that need to be taken.

A plan describes the actions that need to be taken by including objectives, metrics, milestones and deliverables required of each stakeholder group and their proposed level of effort. Additionally, the action plan should align with, and support, the overall organizational strategy.

Once complete, this plan is imperative in forecasting costs, resource allocation and the project timelines involved in the implementation of the business initiative.



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Elements of an Action Plan

While a work in progress, the Service Delivery Model Action Plan defines the proposed model for delivering the newly defined learning consultant capabilities to the organization. It is determined that this capability will help guide SFA U's business objectives to deliver quality customer service and to support SFA in achieving performance excellence. The plan provides:

- Description of Service Delivery Model
- Objectives
- Metrics, Indicators of success
- Approach and Milestones
- Deliverables
- Level of Effort, Roles & Responsibilities
- Dependencies
- Performance Plans
- Costs

The plan describes and provides measurable objectives towards the initiative. It lays out a high level approach and timeframe, which supports the new training delivery and development process. Five main deliverable checkpoints are listed within the plan and a high level overview of what is to be included in each deliverable is listed as well. All key stakeholders have been named, along with roles, responsibilities, and estimated percentage of time spent on the Learning Consultant capability-building task. Some dependencies and costs have been identified, but not defined.

Appendix C includes a copy of the action plan for future development of the Learning Consultant role.



Appendices



Appendix A:
Working Session



Appendix B:

Conceptual Design

- Service Delivery Model diagram
- Learning Consultant basic definition



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Appendix C:

Action Plan
