

Name, Title: Johan Bos-Beijer, Chief of Staff, Financial Partners Channel

Date: 06/13/01

Attendees: Laura Maniccia and Dinah Nelson

Purpose of interview

Today, we will focus on identifying the functionality the LMS should provide and the selection of the LMS software package. Your input is critical to ensure the LMS meets the needs of the entire organization.

Role Background

What is the role of your department?

The Financial Partners (FP) Channel facilitates the FFEL program. FP consists of 83 total staff, 60% of which work in Partner Services, which is spread between four regional offices. Ten people work for Partner System Services, which is being phased out, twelve people work for Financial Management, and eleven people work in the local business management office. Partner Services has the most urgent training needs of this channel, and therefore also has the information to build a business case for the LMS.

Since Partner Services' Directors are located elsewhere, Wanda Simms will set up a time the week of June 18th to have a conference call and gather business case data. Most of the questions below will be answered at that meeting.

Current Training Administrative Needs

1. What registration system does your organization currently use?
2. How much money did your organization spend on training last year?
3. What was the money spent on?
4. How much of the money was spent on contractors?
 - For registration?
 - For logistics?
5. How much of the money was spent on training SFA personnel?
6. How much of the money was spent on training non-SFA personnel?
7. How many people did your department train last year?
 - How many people were not trained last year, but should have been?
 - Why did the latter group not attend training?
8. What is the expected number of SFA users for an LMS in your department?
9. What was the average number of training courses taken by each SFA user last year?

- How many of those courses were run by SFA?
- How many of those courses were run by external vendors?

10. What percent of SFA users experienced turnover in the last year?

[Ten – in Partner System Services.](#)

11. What is the expected number of non-SFA users for an LMS in your department?

12. What was the average number of training courses taken by each non-SFA user last year?

- How many of those courses were run by SFA?
- How many of those courses were run by other vendors?

13. How many conferences did employees in your department attend last year?

[Wanda Simms is gathering this information.](#)

- How many of those conferences were run by SFA?
- How many of those conferences were run by external vendors?

14. How many times is each SFA course offered each year?

Conclusion

Is there anything else that we should be considering that we have not discussed?

Can we follow up with you on detailed questions over the next week or two as we complete our analysis?