



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

Logistics Plan

April 2, 2001



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1. Executive Summary

This document is designed to determine a set of logistics requirements for the Student Aid Front 2 Back course; to provide guidance on how to select an event planning firm; and to create a process for selecting Presenters, Logistics Coordinators, and Logistics Hosts for the Student Aid Front 2 Back training course. Specifically, the document focuses on:

- Site Selection and Set Up
- Communication Plan
- Presenter Selection Process
- Logistics Coordinator/Host Selection Process
- Operating Partners Strategy
- Student Aid Front 2 Back Pilot Plan

A list of logistics requirements is determined for implementing the Student Aid Front 2 Back course in the regions and Washington, DC. These parameters are then used to obtain bids from three event planning firms. Based on the resulting bids, recommendations are made for selecting an event planning firm to perform a portion of the logistics duties. After recommendations for selecting an event planning firm were received, SFAU decided to use NCS Pearson to perform the recommended event planning actions.

A marketing strategy is created to request that SFA and Operating Partner staff apply to become Presenters for the Student Aid Front 2 Back course. This involves developing a communication plan, as well as tools for communicating the request to the various groups involved.

The process for selecting Presenters from SFA and Operating Partner staff was developed for implementation by SFA. Criteria are established and used to objectively evaluate each application received. Based on this evaluation, a set of candidates is selected to move on to the audition phase of the Presenter selection process. All candidates will audition using the same material and instructions. These auditions will be judged by a panel based on the candidate's performance and measured against established criteria. Presenters will be selected from the eligible candidate pool during the audition phase. They will attend a two-week Training of Presenter (TOP) course before being assigned to facilitate between five and seven sessions of the Student Aid Front 2 Back class.



A separate process is developed to select Logistics Coordinators and Logistics Hosts, from within SFA, for each session of the Student Aid Front 2 Back course. Similar to the Presenter selection process, a set of selection criteria are established and used as a guidepost for evaluating the applications received. Logistics Coordinators will be required to run at least three to five sessions and available to act as a back up for at least two additional sessions. They must also attend a two and a half day training session in Washington, DC from 5/9 to 5/11. Logistics Hosts will be assigned to handle all Student Aid Front 2 Back sessions in their region and perform site visits as necessary.

Key timeframes to for the Student Aid Front 2 Back course:

- Presenter Application And Review Process: 3/15 – 3/19
- Logistics Coordinator/Host Application And Review Process: 4/9 – 4/11
- Presenter Auditions (1 day): 3/26 – 4/10 (Regional audition in Chicago, IL on 4/3)
- Logistics Coordinators/Hosts Selected: 4/13
- Presenters Selected: 4/12
- Student Aid Front 2 Back Pilots (1 day each): 4/2 – Washington, D.C.; 4/4 – Chicago, IL
- TOP Course (2 weeks): 5/1 – 5/11
- Student Aid Front 2 Back Delivery: 5/15 – 8/1



2. Site Selection And Set Up

The first step in determining a logistics plan is to identify the necessary elements, or required items, for each training session. These needs will vary depending on whether the session will be held in one of the ten regions or in Washington, DC.

A need has also been identified for a registration system that is accessible on-line for both SFA and Operating Partner employees. SFAU will have several options to address this need, one of which is to explore the cost of having this service provided by an event planning firm. In an effort to cut costs, it was determined that the current SFAU registration system can be utilized for the Student Aid Front 2 Back course and will allow access by both SFA employees as well as Operating Partners. A password will be distributed to the Operating Partners along with a link for them to access the system via the internet.

The event planning firm was asked to submit a proposal based on a set of parameters which included: suggested cost per person for catering, allowable distance away from the regional office for the training site, and that the site be accessible by public transportation.

These parameters were used as a basis for obtaining bids from three event planning firms: Meeting Management Services, Accommodations Unlimited, and ConferenceDirect.

Based on the bids received, only one of the firms, ConferenceDirect, is able to provide SFA with the type of facilities desired. In addition to being the only firm that can obtain non-hotel space, their bid was the only one to provide every other service requested at a competitive price.

It is recommended that ConferenceDirect be chosen to source the conference space in the regions, obtain necessary supplies and equipment, create and maintain a registration system accessible to both SFA and Operating Partners via the internet, and work with caterers both in the regions and in Washington, DC.

Please reference [Appendix A](#), Logistics Requirements, for additional information.



3. Communication Plan

A communication plan is essential to ensure timely communication, achieve buy in from both SFA and Operating Partner leadership, and successfully implement logistical arrangements for the Student Aid Front 2 Back course. The communication plan details the event, audience, dates, source, and expected outcomes for each communication message/event.

Please reference Appendix B, Communication Plan, for additional information.



4. Presenter Selection Process

The Presenter selection process is broken down into two pieces. One process is for SFA employees, and the other for Operating Partners.

The SFA Employee Presenter Selection Process was developed in an effort to make sure that the net is cast as wide as possible, providing everyone in SFA and the Operating Partners with the opportunity to apply to be a Student Aid Front 2 Back Presenter. With this goal in mind, steps were developed to ensure management awareness and involvement in the process. Steps were also taken to ensure that applying to be a Student Aid Front 2 Back Presenter is viewed as a positive experience by everyone involved, including those that are not selected.

The Operating Partner Presenter Selection Process was developed with the same goals as the SFA Employee process. Although this process is tailored to the Operating Partners, it includes the same focus on fairness and ensuring that this process is a positive experience for everyone involved.

Application Review Process

The application review process was designed to ensure that all SFA employees and Operating Partners are considered, regardless of prior facilitation experience or current job/position. First, a four to five person application review panel is selected and put into place. Next, the applications submitted via e-mail are retrieved from the “Share Post” and forwarded to the process owner, Midge Hunt. Once the application deadline passes, the review panel will meet and review applications based on a clearly defined and communicated set of criteria. If selected as a semi-finalist, the candidates will be invited to the audition phase of the Presenter selection process.

Audition Process

The audition phase of the Presenter selection process will determine which applicants from SFA and the Operating Partners are selected as Presenters for the Student Aid Front 2 Back training course. Although the goal is to have a 1:1 ratio of SFA and Operating Partner Presenters whenever possible, it is essential that all candidates are evaluated against the same criteria. The Auditions will be held in Washington, DC and a regional audition will be held in Chicago, IL.

Guidelines have been established for how auditions will be set up and conducted. The panel will see up to two auditions per hour with a maximum of 14 per day. Prior to delivering their audition presentation, each candidate will be greeted by the Audition Greeter, introduced to the panel, and receive a brief overview of the audition format. Applicants will then have five minutes to set-up and ask clarifying questions



(Overhead, screen, and two flipcharts will be provided if requested). Following the audition, the panel will have 12 minutes to fill out an Audition Evaluation Tool for each applicant and transition to the next audition. The Audition Evaluation Tool will be used as the basis for selecting Student Aid Front 2 Back Presenters.

Please reference the following appendices for additional information about the roles and responsibilities of the presenters:

- [Appendix C](#) for Greg Woods Meeting Memo
- [Appendix D](#) for Presenter Overview Communication E-Mail
- [Appendix E](#) for Presenter Detailed Description of the Criteria
- [Appendix F](#) for Presenter Student Financial Aid Front 2 Back Audition Application
- [Appendix G](#) for Presenter Selection Process
- [Appendix H](#) for Presenter Audition Evaluation Tool



5. Logistics Coordinator/Host Selection Process

The logistics process for the Student Aid Front 2 Back course has two distinct roles that need to be filled, the Logistics Coordinator and the Logistics Host. SFA employees located in Washington DC and in regional offices are eligible to apply as Logistics Coordinators. However, due to the nature of the position, only SFA employees in regional offices can apply to be Logistics Hosts.

With these two qualifications established, a goal of the Logistics Coordinator/Host selection process is to ensure that everyone in SFA and Operating Partners has an opportunity to apply regardless of their experience or current position. Other goals are to recruit approximately 25 Logistics Coordinators from across SFA and at least one Logistics Host in each region.

Application Review Process

The application review process was designed to ensure that all SFA employees and Operating Partners are considered equally and will be evaluated on a clearly established and communicated set of criteria. First, a four to five person application review panel is selected and put into place. Next, applications submitted via e-mail are retrieved from the “Share Post” and forwarded to the process owner, Vicki Wilson. Once the application deadline passes, the review panel will meet and review applications based on a clearly defined and communicated set of criteria. If selected as a Logistics Coordinator, the applicant will be notified and required to attend a two and a half day training session in Washington, DC from 5/9 to 5/11. Selected Logistics Hosts will not be required to travel. Information and training materials will be relayed to Logistics Hosts via e-mail and a training conference call will be conducted between 4/23 and 4/27.

Roles and Responsibilities

Roles and responsibilities have been created for both the Logistics Coordinator and Logistics Host positions. Each step of the process has been thoroughly documented in the sections that follow. These role descriptions will be used as the basis for next steps and Logistics Coordinator/Host training materials.

Please reference the following appendices for additional information:

- [Appendix I](#) for Logistics Overview Communication E-Mail
- [Appendix J](#) for Logistics Detailed Description of the Criteria
- [Appendix K](#) for Logistics Coordinator/Host Application
- [Appendix L](#) for Logistics Coordinator/Host Selection Process
- [Appendix M](#) for Logistics Roles and Responsibilities



6. Operating Partner Strategy

One of the goals of the Student Aid Front 2 Back course is for SFA and Operating Partners to jointly participate in offering, delivering, and attending the Student Aid Front 2 Back course wherever possible. Some of the benefits of partnering for course delivery would be to strengthen relationships between SFA and Operating Partner employees, further develop “in house” financial aid expertise, and continue to establish a shared vision of the future of SFA.

A strategy was devised that would allow for side-by-side participation between SFA and Operating Partners. It was then presented to the Operating Partners Training Working Group in order to obtain input and feedback. The next step was to take this strategy and present it to the Operating Partner Executives during a conference call. During this call, it was established that each Operating Partner would follow up and tailor a plan that best fits individual needs while keeping the original goal of side-by-side participation in mind.

Sarah Babson of SFAU will negotiate individual plans for each Operating Partner.

Please reference [Appendix N](#), Operating Partner Strategy, for additional information.



7. Student Aid Front 2 Back Pilot Plan

The Student Aid Front 2 Back course will be piloted twice in order to make final adjustments to course content. The pilot will be run in Washington, DC on April 2, 2001 and in Chicago, IL on April 4, 2001.

The audience will contain 25-30 participants with a 1:1 ratio for Operating Partners and SFA employees, as well as members of the design team. Additionally, it is recommended that Operating Partner and SFA participants represent diverse backgrounds (levels, financial aid experience, years at SFA, etc.).

A core group of Presenters and logistics staff will be used for both classes. At the end of the pilot, this group will work with the design team to determine if any adjustments or changes must be made.

Please reference [Appendix O](#), Student Aid Front 2 Back Pilot Plan, for additional information.



Appendix A – Logistics Requirements

Equipment for Regional Facilities

- Space for 45 people
- Television (32" – 35") and VCR
- Laptop computer with CD – Rom
- LCD projector for the laptop
- 8' Screen
- Two (2) lavalier microphones
- Six (6) round tables
- Five (5) chairs for each round table
- Two (2) 4' tables for the Presenters and registration
- Two (2) chairs for each 4' table
- Table cloths for all eight (8) tables
- Portable CD player or facility provided sound system
- Flipcharts, pads, easels, and markers for each table in the classroom

Equipment for War and Peace Room (These pieces may change based on purchases and rental agreements)

- Space for 45 people
- Television (32" – 35") and VCR
- 8' Screen
- Two (2) Lavalier microphones
- Six (6) round Tables
- Five (5) chairs for each round table
- Two (2) 4' tables for the Presenters and registration
- Two (2) chairs for each 4' table
- Table cloths for all eight (8) tables
- Portable CD player or facility provided sound system
- Flipcharts, pads, easels, and markers for each table in the room

Registration System

- Participants submit: name, e-mail address (separate identifier), office location, and channel
- Course information would include: date, city, location address, location phone number, Presenter names, Logistics Coordinator name
- Send a confirmation e-mail message to each registrant
- Send a reminder e-mail message to everyone who has signed up for the course



Catering

- Catering should be secured with cost saving in mind. The event planning firm should be asked to obtain lunch service for as close to \$15 per person as possible.

Other Specifications

- Accessible by persons with disabilities
- No more than eight miles from the regional office location
- Preferably accessible by the metro/subway
- Preferably offers Government rates



Appendix B – Communication Plan















Appendix D – Presenter Overview Communication E-Mail

Summary line: FACILITATORS NEEDED! APPLY TODAY!

Want to be a facilitator? Here's your chance to shine!

- Front-line staff and managers alike – if you have the talent, desire, or experience to facilitate, we encourage you to apply!

What would I be doing?

- Facilitating a new course for colleagues, co-workers, and operating partners – similar to the role facilitators played in *SFA Traditions*
- The Course is *SFA Student Aid Front 2 Back*, Part three of the PBO core curriculum from SFA University
- Facilitators will be auditioned and selected from SFA and Operating Partner staff
- Course begins mid-May 2001; requires energy, time, and possible travel

What are the criteria for facilitators?

- Presentation and facilitations skills or talent
- A passion for the SFA mission
- Knowledge of financial aid processes or programs
- Ability to communicate complex information
- Ability to connect with and audience

How do I apply?

- Read attached files for details on selection criteria and process
- Complete the application and e-mail it to SFA_University@ed.gov
- Deadline for applications: **March 15, 2001**

What are the benefits for me?

- Share a great experience with your colleagues while helping our organization reach its goals as a PBO
- Learn even more about financial aid than you already know
- Receive expert coaching to polish your presentation skills
- Have fun and a chance to meet new people



Appendix E – Presenter Detailed Description of the Criteria

What qualities do I need to be a Student Aid Front 2 Back facilitator?

- Presentation and facilitation skills or talent
- A passion for the SFA mission
- Knowledge of financial aid processes or programs
- Ability to communicate complex information
- Ability to connect with an audience

How does the selection process work?

- Complete and submit your application as soon as possible. **Deadline is March 15, 2001.**
E-mail it to SFA_University@ed.gov
- A panel reviews the applications and selects semi-final candidates
 - SFA University will notify you if you are/are not selected as a semi-finalist
- Semi-finalists will audition for a selection panel
 - Auditions will be held in DC and possibly other locations
 - SFA University will notify you if you are/are not selected to be a facilitator
- Finalists attend a “train-the-trainer” session that prepares them to facilitate Student Aid Front 2 Back

What is the time commitment for facilitators? How do I work this out with my manager?

- If you become a semi-finalist: One day for your audition between March 26 and April 6
- If you are chosen as a facilitator:
 - Two weeks (April 30-May 11) for the train-the-trainer session
 - Delivery of 5 to 7 one-day sessions between May 15 and August 1
 - Include 5 to 7 possible travel days
 - One day in fall 2001 for follow-up reflection
 - Total time estimate: a minimum of 17 up to a maximum of 26 work days between May 15 and August 1
- Talk with your manager about the timeframe and the number of that you'll be away from work
- Both of you must agree on whether and how your duties can be covered during that time

Questions? E-mail Midge Hunt at marguerite_hunt@ed.gov or call her at 202-260-2559.



Appendix F – Presenter Student Aid Front 2 Back Audition Application

1. Name:
 2. Office/Location:
 3. Job Title:
 4. Contact Phone Number: () --
 5. I have discussed my interest in participating in the *Student Aid Front 2 Back* presenter selection process with my manager:
 - Yes ()
 - No ()
- Manager's Name:
Manager's Phone Number: () --
6. Tell us about your presentation experience:
 7. Complete this sentence: I am interested in becoming a *Student Aid Front 2 Back* presenter because...
 8. Describe your background and experience with student financial aid:
 9. Describe how what you do in your job supports the SFA mission:



Appendix G – Presenter Selection Process





































Appendix H – Presenter Audition Evaluation Tool

Presenter: _____

Date: _____

Audition Location: _____

Phone #: _____

Facilitation

3 2 1
(+) () (-)

- — — Friendly greeting on arrival (ability to connect with an audience)
- — — Reviews itinerary and objectives (ability to communicate complex information)
- — — Calls participants by name (ability to connect with an audience)
- — — Uses smooth transitions (ability to connect with an audience)
- — — Offers recognition and encouragement (ability to connect with an audience)
- — — Varies voice tone, volume, pace, and dramatic impact (ability to connect with an audience)
- — — Uses relevant and appropriate humor (ability to connect with an audience)
- — — Solicits responses from audience using open ended questions (ability to connect with an audience)
- — — Demonstrates enthusiasm for questions (ability to communicate complex information)
- — — Strong close with recap of key points (ability to communicate complex information)

Content

3 2 1
(+) () (-)

- — — Uses appropriate content points (ability to communicate complex information)
- — — Supports content with appropriate examples (knowledge of financial aid process or programs)
- — — Demonstrates ability to answer questions (ability to communicate complex information)



Non-Verbal

3 2 1
(+) () (-)

- — — Demonstrates enthusiasm and interest in audience (a passion for the SFA mission)
- — — Consistent, random, and natural eye contact (ability to communicate with the audience)
- — — Uses appropriate animated gestures (ability to connect with the audience)
- — — Smiles appropriately (ability to connect with the audience)
- — — Moves around classroom appropriately (ability to connect with the audience)
- — — Is on time for audition (logistics)
- — — Adjusts content to fit time constraints (logistics)

Overall

3 2 1
(+) () (-)

- — — A passion for the SFA mission
- — — Knowledge of student financial aid processes or programs
- — — Ability to communicate complex information
- — — Ability to connect with an audience

Written Comments:
(positive, negative, positive for applicant notification)

Stack 1
"No"

Stack 2
"Maybe"

Stack 3
"Yes"



Appendix I – Logistics Overview Communication E-Mail

Summary line: INTERESTED IN LOGISTICS FOR STUDENT AID STUDENT AID FRONT 2 BACK?

Want to be a Logistics Coordinator/Host for Student Aid Front 2 Back?

- Here's your chance to get involved in our new course, *Student Aid Student Aid Front 2 Back*. Not everyone wants to be a presenter, but you may have the interest, dedication, and skill to make sure that everything runs smoothly in the classroom.

What would I be doing?

- If you work in one of the Regions, you can apply to be a Logistics Host (LH) – no travel required, just work with a DC contact to make sure course materials are received at your office and delivered to the course location.
- If you work in either DC or the Regions, you can apply to be a Logistics Coordinator (LC), with responsibility for setting up the classroom and the AV, ensuring that materials, giveaways, and meals are ready when needed, and help create a great experience for the participants. This role requires getting there early in the morning and staying till it's over.

How do I apply?

- Read the attached file on LC and LH selection criteria. It gives more details about what's involved in each role to help you decide.
- Talk with your manager about the time commitment – details are included in the "Selection Process" file.
- Complete the attached application, email it to SFA_University@ed.gov
- Deadline for applications: **April 6, 2001**

Can I apply as both a Logistics Host and a Logistics Coordinator?

- Yes, if you are a regional employee – you would have to be available for each session in your region. No, if you work in DC.

What are the benefits for me?

- Share a great experience with colleagues while helping our organization reach its goals as a PBO
- Put your strong organizational skills to work on a rewarding project
- Learn what goes on behind the scenes to make a dynamic and exciting program work
- Have fun and a chance to meet new people



Appendix J – Logistics Detailed Description of the Criteria

What qualities do I need to be a *Student Aid Front 2 Back Logistics Coordinator or Host*?

- Strong organizational skills
- Ability to work quickly, meet deadlines, handle several tasks at once, and solve problems when things go wrong
- Government travel card; LC must be able to travel on short notice as a backup coordinator
- A passion for the SFA mission

What is a **Logistics Host (LH)**?

- One SFA employee serves as Host in their own region
- Logistics Host does not need to travel
- Works with SFA U to get course materials shipped and received properly at the regional office
- Stores materials, delivers them to the site the day before each session
- May be called to help with on-site logistics in an emergency

What does a **Logistics Coordinator (LC)** do?

- Attend a 2 1/2 day LC Training in DC (May 9 through May 11)
- Must commit to handle logistics for 3 to 5 one-day sessions between May 15 and August 1
- Make necessary travel and hotel arrangements for yourself (SFA U pays for travel)
- Arrive at session early to set up for 8:30 am class; remain until 5:00 pm to clean up afterwards
- Responsible for smooth running of the session: handling materials, AV, visual aids, confirming lunch arrangements, and other duties as assigned.

How does the selection process work?

- Complete and submit your application as soon as possible. **Deadline is April 6, 2001.** Email it to SFA_University@ed.gov
- A panel reviews the applications and selects the Coordinators and the Hosts
 - SFA University will notify you if you are/are not selected



What is the time commitment for Logistics Coordinators? How do I work this out with my manager?

- If selected as Logistics Coordinator:
 - Attend 2 ½ day LC Training in DC
 - Handle 3 to 5 one-day *Student Aid Front 2 Back* sessions
 - Include 3 to 8 possible travel days
 - One day in fall 2001 for follow-up reflection
 - Total time estimate: a minimum of 6 and a maximum of 12 work days between May 10 and August 1
- Talk with your manager about the timeframe and the number of days that you'll be away from work
- Both of you must agree on whether and how your work can be covered during that time

Questions? Email Vicki Wilson at Wilson_Vicki@ed.gov or telephone 202-708-8619.



Appendix K – Logistics Coordinator / Host Application

1. Name:
2. Office/Location:
3. Job Title:
4. Contact Phone Number: () --
5. I have discussed my interest in participating in the *Student Aid Student Aid Front 2 Back* Logistics Coordinator/Host selection process with my manager:

- Yes ()
- No ()

Manager's Name:

Manager's Phone Number: () --

6. Do you have a U.S. Government issued VISA credit card in your name that can be used to pay for travel?

- Yes ()
- No ()

7. I am applying to be a: (Regional employees may check both.)

- Logistics Coordinator () *Can be either a Washington DC, or a regional office employee*
- Logistics Host () *Only regional office employees may apply (travel is not required for this position)*

8. Tell us about your experience working with logistics.

9. Complete this sentence: I am interested in becoming a *Student Aid Front 2 Back* Logistics Coordinator/Host because...



Appendix L – Logistics Coordinator/Host Selection Process



















Appendix M – Logistics Roles and Responsibilities

SFAU Registration & Logistics Team: Michael, Scarlett, and Terry

Responsibilities:

- Track session registration and communicate information to Anita for communication updates
- Track session registration and communicate information to the COTAR and the event planning firm for catering, space, and equipment updates
- Utilize registration information to pre-print certificates and name badges
- Work with Logistics Hosts in regional locations to set up the shipping and receiving of all training materials
- **Package, ship, and track:** pre-printed certificates, spare blank certificates, name badges, spare blank name badges, one entrance sign, two lobby signs with room for arrows or directions, promotional items, course game and game pieces, game items for breaks and ice-breakers, music, and all other logistics related items to Logistics Coordinators at respective sites

Logistics Coordinator:

Assumptions:

- Role in course delivery is to help create a powerful and meaningful experience for everyone that attends the class
- Responsible for accommodating any class participants with special needs
- Responsible for any problem solving and trouble shooting necessary to make sure that each session of Student Aid Front 2 Back is a success

Pre-Course Responsibilities:

- Attend Logistics Coordinator two and a half day training session (5/9 – 5/11)
- Logistics Coordinators are assigned to specific class sessions
- Work with Logistics Hosts in regional locations to set up the shipping and receiving of all training materials
- Make all necessary travel arrangements for self
- Travel to assigned sites on time and ready to go

On-Site Responsibilities (Day Prior to Class):

- Establish hotel contacts for facilities, A/V, and banquet accommodations
- If possible, meet with Facilitator(s) to run through questions and updates
- Meet with the Logistics Host to receive the course materials



On-Site Responsibilities (Pre-Class):

- Verify facility set-up is correct (includes round tables, facilitator tables, and registration tables)
- Verify that any and all A/V equipment is present and functioning correctly
- Verify that signs and directions are adequate
- Distribute all training materials for the participants and facilitators on the tables
- Distribute all registration materials for the participants
- Distribute all table items throughout the room
- Ensure all course items are present and ready to go when needed (course game items and game/ice-breaker items)
 - **Ensure that the above tasks have been completed at least one (1) hour prior to the start of class**
 - **Meet with facilitators one (1) hour prior to the start of the course to handle last minute updates and details**
- Ensure that the music is playing at an appropriate volume
- Greet all class participants
- Distribute name badges and handle the sign-in/check-in of all participants
- Create name badges for anyone not pre-registered for the class and make name corrections as necessary

On-Site Responsibilities (During Class):

- Track time and keep the course on schedule
- Coordinate music during break periods
- Anticipate and confirm lunch and break refreshments
- Ensure the accuracy of enrollment
- Distribute items for games and ice-breakers as necessary
- Create temporary certificates for anyone not pre-registered for the class
- Coordinate the running of all audio-visual equipment with the Presenters
- Trouble shoot and remedy any problems that might arise during course delivery
- Distribute and collect evaluations
- Distribute certificates to participants

On-Site Responsibilities (After Class):

- Pick up “disposable” materials and discard
- Gather “re-usable” course materials and return them to the Logistics Host for storage and use during the next session (if necessary)
- Maintain all registration items
- Return Home



Post Course Responsibilities:

- Print and distribute new certificates for all non-registered participants
- Relay registration information to the person(s) managing the training database so that everyone receives credit for attending the course
- Attend de-brief session in Fall 2001

Logistics Host:

Assumptions:

- No out of town travel will be necessary for this position
- All Logistics Hosts will be SFAU regional employees
- Will act as a back up for on site emergency situations

Pre-Course Responsibilities:

- Provide the Logistics Coordinator and SFAU Registration & Logistics Team with the correct contact information to ensure accurate shipping of the course materials
- Receive all shipped course materials
- Store materials for course until all sessions in that regional location have been conducted
- Conduct site visits as necessary
- Prior to the “Training Conference Call,” read through the Logistics Coordinator training materials and compile a set of questions for discussion
- Participate in a conference call for training purposes (4/23 – 4/27)

On-Site Responsibilities (Day Prior to Class):

- Deliver the correct amount of shipped materials to the Logistics Coordinator at the hotel/training site for that specific training class
- Continue to store additional items for use in future Student Aid Front 2 Back training classes (if necessary)

On-Site Responsibilities (Day of Class):

- Be available to receive any “re-usable” materials from the Logistics Coordinator for use in future Student Aid Front 2 Back training classes (if necessary)
- In emergency situations, step in as a backup resource to aid Presenters with implementing the course when a Logistics Coordinator is unable to participate in the session



Post-Course Responsibilities:

- Create the “Training Kit” for the next Student Aid Front 2 Back training class (if necessary) by combining “re-usable” items with the correct number of general class materials
- Coordinate delivery of the “Training Kit” to the Logistics Coordinator assigned to the next Student Aid Front 2 Back training class (if necessary)



Appendix N – Operating Partner Strategy

Operating Partners are encouraged to

- Sponsor candidates to apply and audition to be Student Aid Front 2 Back facilitators. Each facilitator will be assigned approx. 5-7 Student Aid Front 2 Back delivery dates between 5/15/01 and 8/1/01 for SFA and Operating Partner audiences. Travel is required for facilitator auditions (1 day between 3/26/01 and 4/6/01) and participation in a 2-week train-the-trainer course (4/30/01 to 5/11/01). Travel may be necessary for course delivery, depending on class location and assignment. Operating Partners are responsible for covering all related travel costs.
- Sponsor class participants ½ Operating Partner and ½ SFA for Student Aid Front 2 Back Pilot, scheduled for 4/2/01 in Washington, D.C. and 4/4/01 in Chicago, IL. A maximum of 15 class participants per Operating Partner will be needed for each location.
- Offer the 8-hour Student Aid Front 2 Back course between 5/15/01 and 8/1/01, except when to do so would result in an adverse impact to the project's performance measures (e.g., call centers). Operating Partners who are not able to offer the 8-hour course are responsible for condensing the course and tailoring the materials. The design team can assist in providing advice to condense the course and ensure learning objectives are met. Operating Partners are responsible for covering logistics and related costs for delivering Operating Partner-sponsored sessions. If desired, Operating Partners may request an SFA Student Aid Front 2 Back facilitator by 4/1/01 for any Operating-Partner-sponsored course.
- Provide SFA the date, time, place, and available number of seats for the Operating Partner-sponsored Student Aid Front 2 Back session(s) by 4/1/01 for inclusion in the SFA registration system. Seats at each location will be filled on a first-come, first-served basis.

Action Steps

- Sarah Babson (Sarah.Babson@ed.gov) will send Facilitator Application information to the Operating Partner executives and the representatives for the Operating Partner Training Workgroup by 2/28/01. The application deadline is 3/15/01.



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- Sarah Babson (Sarah_Babson@ed.gov) will work with the representatives for the Operating Partner Training Workgroup to solicit participation in the Student Aid Front 2 Back pilot.
 - Operating Partner executives will discuss individual plans to offer Student Aid Front 2 Back with Sarah Babson (Sarah_Babson@ed.gov) by 2/28/01. Details for delivery (date, time, place, available number of seats, and facilitator requests) will be provided to Sarah no later than 4/1/01.



Appendix O – Student Aid Student Aid Front 2 Back Pilot Plan

