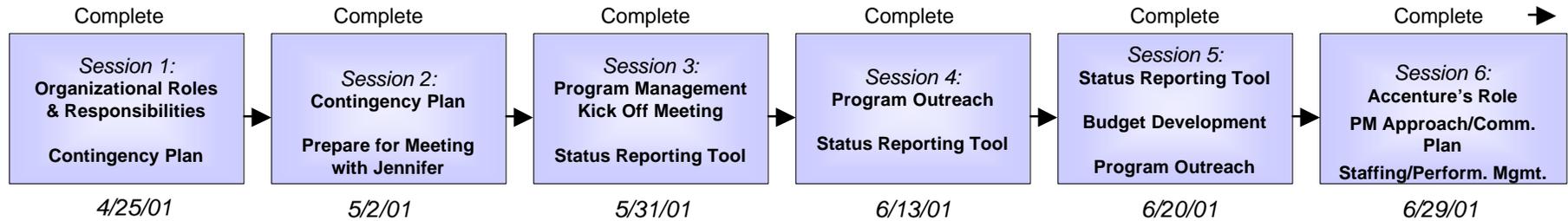


# Student Aid Awareness Work Plan: May – June 2001



**Roles:**

**AC:** Lead Facilitator  
**SAA:** Input

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**SAA:** Input/Facilitate/  
Agenda

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Agenda

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**SAA:** Input/Facilitate/  
Agenda

**Objectives:**

**Roles & Responsibilities**

- Review roles and responsibilities, to include: position names, series and grade levels
- assign staffing plan against projects

**Contingency Plan**

- Discuss creative staffing options

**Contingency Plan**

- Agree upon back-up plans

**Objectives and Expectations**

- Agreed upon: objectives, meeting schedule, expectations of team and individual, and operating agreements

**Roles and Responsibilities**

- Agree upon work to be performed
- Agree upon roles and responsibilities of SAA and Accenture

**Status Reporting Tool**

- Discuss status reporting tools – objectives, benefits, and responsibilities

**Program Outreach**

- Understanding of goals, objectives, and measurement criteria
- Prioritize 6 Outreach activities for FY01

**Status Reporting Tool**

- Agree upon implementing for next meeting with Jennifer

**Status Reporting Tool**

- Agree to change the tool to better meet the reporting needs of SAA

**Budget Development**

- Discuss elements affecting budget decisions (i.e. travel, conferences, office supplies)

**Program Outreach**

- Agree on consistent web site reference – [www.ed.gov/student\\_aid](http://www.ed.gov/student_aid)
- List of website references to be developed by interns

**Accenture's Role**

- Agreed upon: facilitation, agenda/minutes, contingency plan around scheduling conflicts, working relationship timeframe, Accenture's value

**Program Management Approach**

- Introduce PM methodology, tools and techniques
- Introduce team calendar

**Staffing**

- Address current situation and future needs

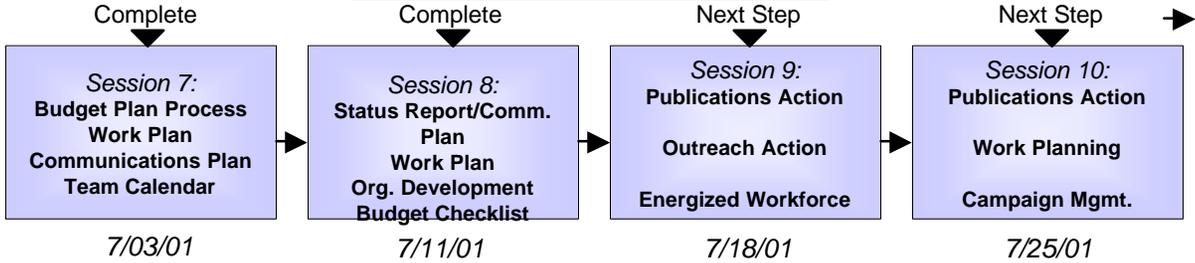
**Performance Management**

- Discussion about GPAS criteria help off-line

**One-on-One Meetings:**

- **Dena** – 6/4 - Current initiatives and PM tools  
6/27 – Work Plan and value-add opportunities
- **Hazel** – 6/4 Current initiatives and PM tools  
6/26 – Action Plans and value-add opportunities
- **Linda** – 6/11 – Overall Planning, Work Plan, and GPAS descriptions  
6/12 - Overall Planning, Work Plan, and GPAS descriptions

# Student Aid Awareness Work Plan: July 2001



**Roles:**

- |   |   |   |   |
|---|---|---|---|
| <p><b>AC:</b> Lead Facilitator<br/><b>SAA:</b> Input/Facilitate/ Agenda</p> |
|---|---|---|---|

**Objectives:**

- |  |   |   |   |
|--|---|---|---|
| <p><b>Budget Planning Process</b></p> <ul style="list-style-type: none"> <li>Better understanding of budget related to SAA/SFA.</li> </ul> <p><b>Communication Plan</b></p> <ul style="list-style-type: none"> <li>Provide input for meetings, e-mails, publication releases, conferences, etc.</li> </ul> <p><b>Team Calendar</b></p> <ul style="list-style-type: none"> <li>Provide input for meetings, vacations, training, etc.</li> </ul> | <p><b>Status Reporting</b></p> <ul style="list-style-type: none"> <li>Review recommendations and agree on modifications.</li> </ul> <p><b>Communication Plan</b></p> <ul style="list-style-type: none"> <li>Provide input communication plan.</li> </ul> <p><b>SAA/Accenture Work Plan</b></p> <ul style="list-style-type: none"> <li>Introduce direction of team going forward and progress to date..</li> </ul> <p><b>Organizational Development</b></p> <ul style="list-style-type: none"> <li>Discuss organizational models and map to current and desired future state for operational roles and responsibilities</li> <li>Agree upon decision making process</li> </ul> | <p><b>Publications</b></p> <ul style="list-style-type: none"> <li>Agree on a 4 year plan for development of new products and services</li> <li>Completion of first year new products</li> </ul> <p><b>Outreach</b></p> <ul style="list-style-type: none"> <li>Agree upon target populations for FY02 campaign and categorized strategic pool of partners</li> <li>Update on partnerships formed</li> </ul> <p><b>Energized Workforce</b></p> <ul style="list-style-type: none"> <li>Discuss necessary skills</li> </ul> | <p><b>Publications</b></p> <ul style="list-style-type: none"> <li>Establish feedback mechanism for determining efficacy of new products</li> </ul> <p><b>Work Planning</b></p> <ul style="list-style-type: none"> <li>Introduce work planning tool for program areas</li> </ul> <p><b>Campaign Management</b></p> <ul style="list-style-type: none"> <li>Define customer profile sheet</li> <li>Introduce marketing tools and techniques</li> </ul> |
|--|---|---|---|

**One-on-One Meetings:**

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>Dena -</li> <li>Hazel – Scheduled for 7/11/01</li> <li>Linda -</li> </ul> | <p><b>Lessons Learned Budget &amp; Conference Checklist</b></p> <ul style="list-style-type: none"> <li>Review and agree upon Lessons Learned Budget &amp; Conference Checklist.</li> </ul> |
|--|--|