

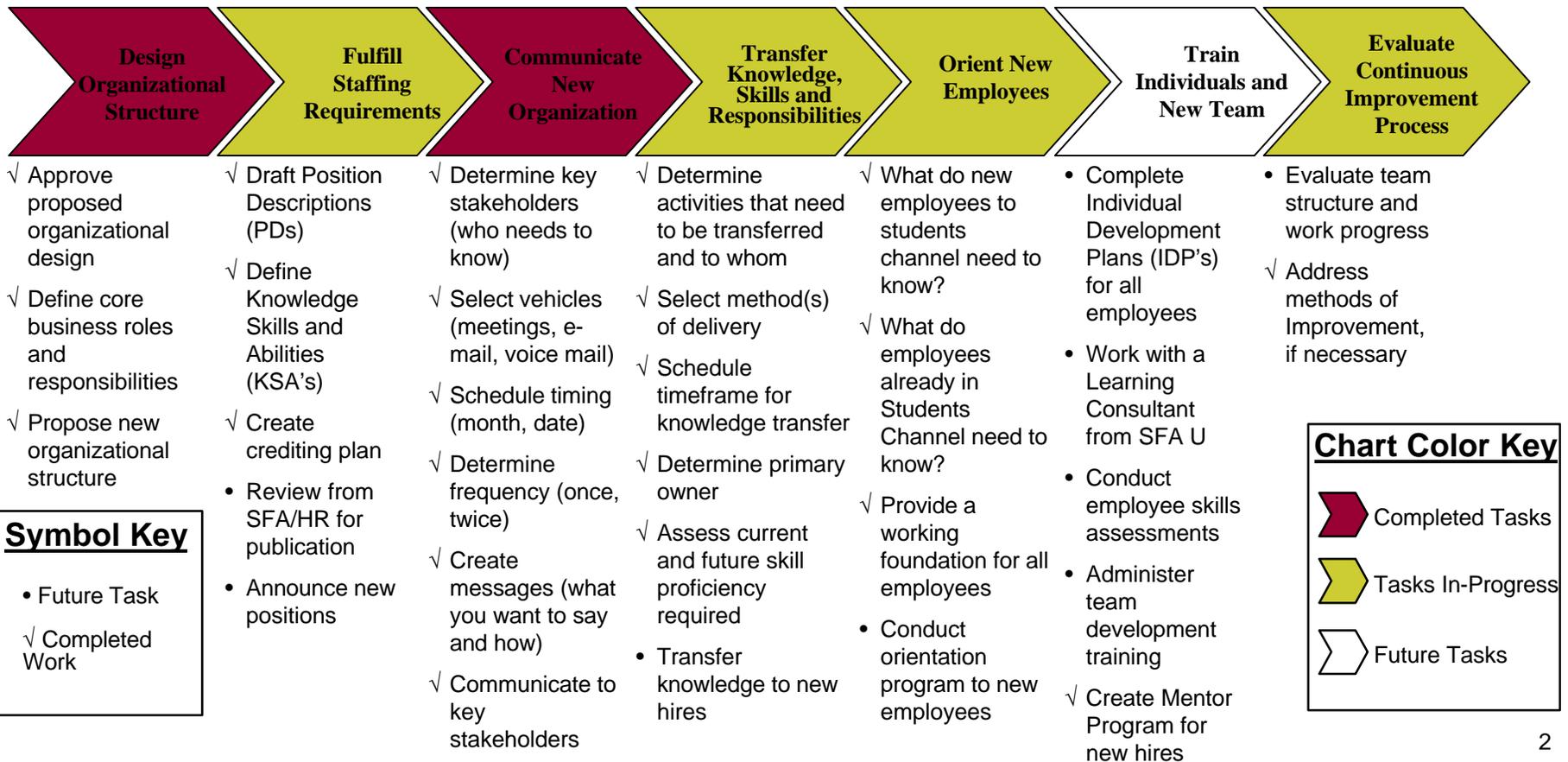


**Students Channels Immediate Office
Transition Plan**

April 12, 2001

Transition Plan

Implementation of the transition process begins as soon as the organization design is approved. It is the process of converting the new organization design and processes to allow for the effective and complete implementation of the new organization. The major transition categories and activities are as follows:



Design Organizational Structure

This category involves designing the core business functions necessary to operate in a desired organizational model. The activities associated with this category include:

Activity	Outputs	Responsibilities	Timing of Activities
<ul style="list-style-type: none"> √ Assess Current Organizational Structure(s) 	<ul style="list-style-type: none"> √ New Organizational Design 	<ul style="list-style-type: none"> • Interviews <ul style="list-style-type: none"> □ Assess Schools Channel and Financial Partner's Organizational Structures □ Determine Organizational State for Core Business Functions (HR, CIO, CFO, Acquisitions & Contracting, Analysis, Communications and SFA University) • Define Core Business Functions and Required FTEs <ul style="list-style-type: none"> □ Determine Responsibilities, Tasks and Activities that need to be performed □ Group Tasks into Roles □ Create Jobs from Core Roles □ Determine Grade Levels Required and Appropriate Series • Select Organizational Operating Structure <ul style="list-style-type: none"> □ Assess Current Operating Structure □ Determine Future Needs □ Select Structure(s) that Support Future Operating Structure 	<ul style="list-style-type: none"> • January - February

Fulfill Staffing Requirements

This category involves fulfilling the staffing requirements necessary to operate in the new organizational design. The activities associated with this category include:

Activity	Outputs	Responsibilities	Timing of Activities
√ Position Descriptions (PDs)	<ul style="list-style-type: none"> Finalized and completed PDs 	<ul style="list-style-type: none"> Accenture <ul style="list-style-type: none"> Determine unique qualifications Tailor standardized PDs with unique quals. Craft PDs where no standards are provided Human Resources <ul style="list-style-type: none"> Contact for standard documentation Immediate Office <ul style="list-style-type: none"> Review and approve packages for hire 	<ul style="list-style-type: none"> February
<ul style="list-style-type: none"> √ Knowledge, Skills and Abilities (KSAs) √ Crediting Plans 	<ul style="list-style-type: none"> Finalized and completed KSAs with respective Crediting Plans 	<ul style="list-style-type: none"> Accenture <ul style="list-style-type: none"> Tailor Standard KSAs and Crediting Plans Craft KSAs and Crediting Plans where no standards are provided Human Resources <ul style="list-style-type: none"> Contact standard documentation Immediate Office <ul style="list-style-type: none"> Review and approve packages for hire 	<ul style="list-style-type: none"> February
<ul style="list-style-type: none"> HR Review and Announcement 	<ul style="list-style-type: none"> Finalized and completed Hiring Packages, to include: PDs, KSAs, and Crediting Plans 	<ul style="list-style-type: none"> Accenture <ul style="list-style-type: none"> Complete Hiring Packet for review and sign-off Immediate Office <ul style="list-style-type: none"> Review and Approve Hiring Packages Submit Hiring Packages to HR 	<ul style="list-style-type: none"> February - March

Communicate New Organizational Design

This category involves informing key stakeholders of the new organizational design for Immediate Office within Students Channel. The activities associated with this category include:

Activity	Outputs	Responsibilities	Timing of Activities
<ul style="list-style-type: none"> √ Communicate Students Channel Immediate Office new organizational design and structure 	<ul style="list-style-type: none"> √ Achieve understanding, feedback, and gain commitment from key stakeholders 	<ul style="list-style-type: none"> • Immediate Office <ul style="list-style-type: none"> □ Determine “who” the key stakeholders are □ Select the “vehicles or channels” to communicate about the new organization □ Design “what” messages you want to deliver □ Decide “how” you would like to deliver the messages □ Determine timing, “when” you would like to deliver the messages and how often 	<ul style="list-style-type: none"> • Start February <ul style="list-style-type: none"> □ Continuous Process

Transfer Knowledge, Skills and Responsibilities

This category involves determining what activities need to be transferred to new team members and how. The activities associated with this category include:

Activity	Outputs	Responsibilities	Timing of Activities
<ul style="list-style-type: none"> √ An outline of tasks that need to be transferred with corresponding action plans according to each activity 	<ul style="list-style-type: none"> • Transfer of Knowledge, Skills and Responsibilities 	<ul style="list-style-type: none"> • Immediate Office <ul style="list-style-type: none"> □ List tasks and activities that need to be transferred □ Consider who is the primary owner of the task that will be responsible for the kx transfer □ Assess desired skill proficiency and current skill proficiency □ Determine method of delivering the kx transfer □ Set timeframes for when the kx transfer will start and end □ After kx transfer sessions have occurred, determine next steps 	<ul style="list-style-type: none"> • Start February with defining knowledge, skills and responsibilities to be transferred <ul style="list-style-type: none"> □ Continues through new employee orientation
<ul style="list-style-type: none"> √ Skill attainment log 	<ul style="list-style-type: none"> • Measure individual skills • Measurement of effectiveness of knowledge transfer 	<ul style="list-style-type: none"> • Immediate Office <ul style="list-style-type: none"> □ Weekly status reports □ Log of skills learned on the job, documentation needed to enhance knowledge transfer, and weekly goals to fully integrate into the new position(s) 	<ul style="list-style-type: none"> • TBD <ul style="list-style-type: none"> □ When new employees are hired and start working

Orient New Employees

This category involves informing new employees of core business organizational functions and PBO Traditions. The activities associated with this category include:

Activity	Outputs	Responsibilities	Timing of Activities
√ Design Orientation Program	<ul style="list-style-type: none"> • Knowledge of Students Channel, SFA, and PBO 	<ul style="list-style-type: none"> • Accenture <ul style="list-style-type: none"> □ Provide resources and tools to develop an Orientation Program □ Design an Orientation Program • Immediate Office <ul style="list-style-type: none"> □ Determine messages and material needed to deliver □ Indicate appropriate timing and length of training □ Identify trainers and/or material 	<ul style="list-style-type: none"> • February - March <ul style="list-style-type: none"> □ Design and Development Phase
<ul style="list-style-type: none"> • Roll-Out Orientation Program 	<ul style="list-style-type: none"> • Introduce new and existing employees to the Students Channel Immediate Office 	<ul style="list-style-type: none"> • Immediate Office <ul style="list-style-type: none"> □ Prepare for new, transferring and existing employees □ Plan timing of activities □ Plan for office space □ Prepare Mentors 	<ul style="list-style-type: none"> • TBD

Train Individuals and Team Members

This category involves addressing both individual and team training needs necessary to function in the Immediate Office’s new organization. The activities associated with this category include:

Activity	Outputs	Responsibilities	Timing of Activities
<ul style="list-style-type: none"> • Individual and Team Training 	<ul style="list-style-type: none"> • Curriculum for individual needs and team development • The right knowledge, skills and abilities to perform the necessary duties in the Immediate Office of Students Channel 	<ul style="list-style-type: none"> • SFA University <ul style="list-style-type: none"> ❑ Work with a Learning Consultant to determine Channel specific needs ❑ Develop a curriculum for individuals and team development ❑ Provide a budget breakdown and timeline for recommended training • Immediate Office <ul style="list-style-type: none"> ❑ Provide Team building requirements to the Learning Consultant ❑ Encourage employees to take a skills inventory to determine strengths and weaknesses at fulfilling job requirements ❑ Support training needs ❑ Provide a realistic timeline to conduct training and development 	<ul style="list-style-type: none"> • TBD <ul style="list-style-type: none"> ❑ Based on when hiring freeze is lifted, employees are hired, and the team is formed

Evaluate Continuous Improvement Process

This category involves measuring the new organizational structure through individual and team performance. The activities associated with this category include:

Activity	Outputs	Responsibilities	Timing of Activities
<ul style="list-style-type: none"> √ Manage Implementation Progress and Organizational Support 	<ul style="list-style-type: none"> • Successful implementation 	<ul style="list-style-type: none"> • Accenture <ul style="list-style-type: none"> ☐ Provide support, guidance and feedback as needed • Immediate Office <ul style="list-style-type: none"> ☐ Assess Individual performance ☐ Assess Team performance ☐ Make changes to the transition plan as needed • Students Channel <ul style="list-style-type: none"> ☐ Provide feedback as needed 	<ul style="list-style-type: none"> • TBD <ul style="list-style-type: none"> ☐ Based on when hiring activity can begin