



Student Aid Awareness - Program Management

September 6, 2001

Context

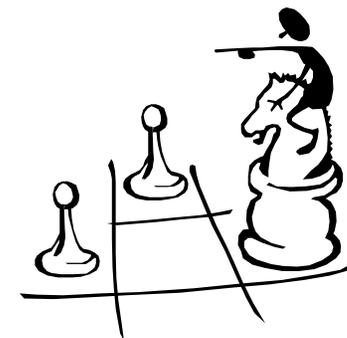
Overall, Student Aid Awareness seeks to better understand and implement “best-in-business” program management practices.

A comprehensive program management approach that aligns with SAA’s mission, strategic planning goals and values enables the organization to effectively define, manage and monitor their organization.

This document represents the results of the program management process for Student Aid Awareness. Accenture facilitated working sessions with SAA’s leadership team to examine the roles necessary to implement program management processes.

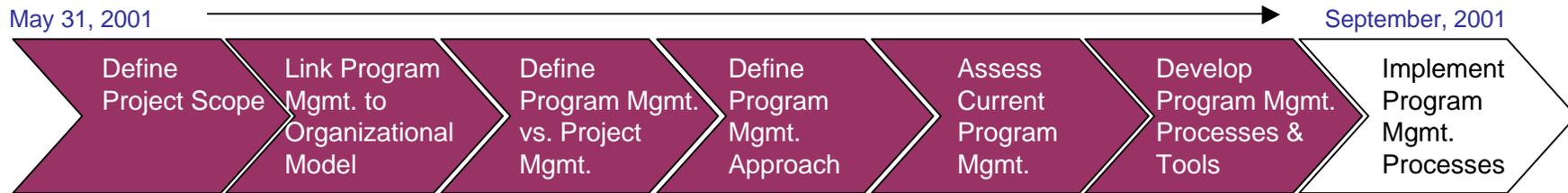
Appendices include:

- Examples of program management tools and techniques including:
 - SAA Summary Status Report
 - Program Area Status Report
 - Communication Plan
 - Budget Planning Checklist
 - Work Plan
 - Conference Planning Checklist
 - Top 10 Lists For More Effective Program Management
- Working session agendas and meeting minutes



Project Plan

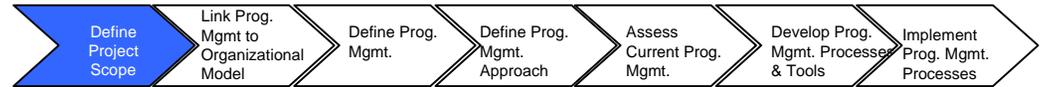
The project planning process outlined below identifies the process taken by the Student Aid Awareness leadership team to better understand program management.



- Define objectives
- Identify key stakeholders
- Develop timeline and work plan
- Identify and assess alternative generic models; i.e. functional, process, project, customer focused, etc.
- Link the organizational structure with the chosen organizational model(s)
- Identify organizational model
- Clarify difference between program and project management
- Understand benefits of program management
- Identify “best-in-business” practices
- Determine program management approach
- Identify high priority program management needs
- Develop and create program mgmt. processes and tools
- Confirm approach/report progress
- Implement program management and marketing tools

Key

- Completed Tasks
- ⬜ Future Tasks



Define Project Scope

Objective:

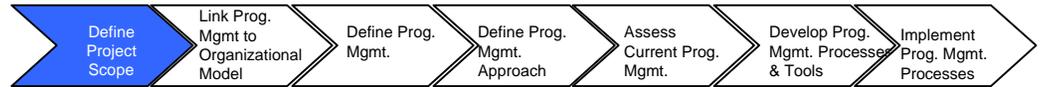
To provide a program management approach and a common methodology of detailed processes and procedures for planning, oversight, management and reporting for Student Aid Awareness initiatives and projects.

This approach will allow management to set direction, make project decisions and measure the results of SAA's projects against SFA performance objectives.

Scope:

A program management framework provides the guidelines, tools and templates for defining, measuring and monitoring SAA projects.

Modernization Partner support included providing a facilitator to work with the leadership team for SAA projects. The facilitator worked with the team lead to incorporate the program management methodologies for status reporting, communication planning, budget planning and work planning.



Program Management Timeline

May 2001

June 2001

July 2001

August 2001

September 2001

APPROACH

- √ Define project scope, objectives, and roles
- √ Develop project approach, timeline, and templates
- √ Research program management best-in-business practices
- √ Conduct kick-off meeting with SAA leadership

PROGRAM MANAGEMENT DEVELOPMENT PHASE

- √ Create master plan (Schedule/Milestones)
- √ Define program management and understand benefits
- √ Link the organizational structure with the chosen organizational model(s)
- √ Define program management approach
- √ Assess current program management practices
- √ Identify high priority program management needs
- √ Propose and select an operating organizational structure
- √ Develop and create program management repeatable processes, tools and techniques
 - √ SAA Summary Status Report
 - √ Program Area Status Report
 - √ Communication Plan
 - √ Budget Planning Checklist
 - √ Work Plan
 - √ Conference Planning Checklist
- Link program management with “best-in-business” marketing practices

TRANSITION PLAN PHASE

- Confirm approach/report progress
- Implement program management and marketing tools
- Evaluate feedback and modify program management approach

APPENDIX E

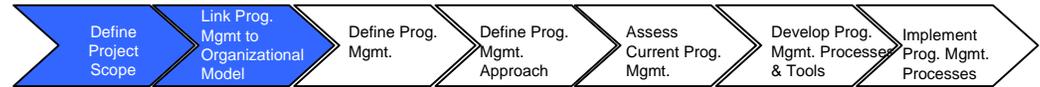
Student Aid Awareness Work Plan

Symbol Key

- Future Task
- √ Completed Work

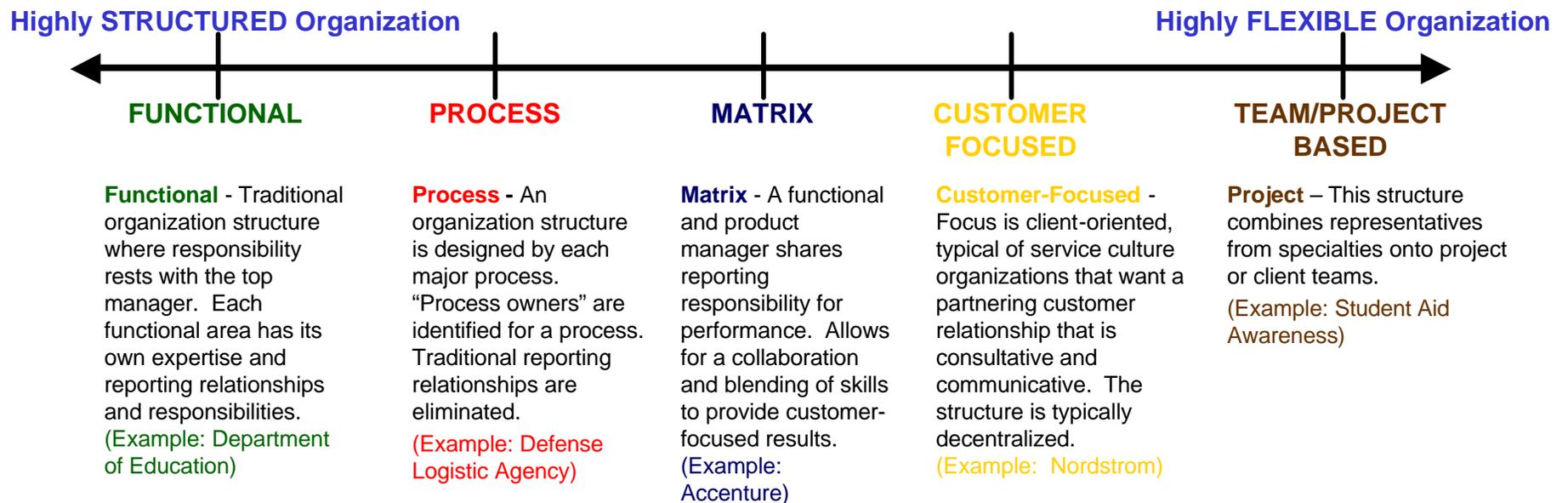
SAA: Program Management – September 2001

WEEKLY STATUS MEETINGS & INDIVIDUAL TEAM MEETINGS

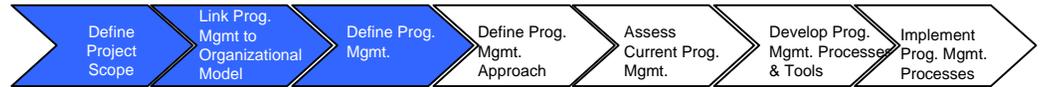


Link Program Management to Organizational Model

As Student Aid Awareness moves from a highly structured, functional organization to a more flexible, customer-focused organization, it is recommended that SAA use a program management discipline to support their business goals, objectives and processes.



Organizational Lifecycle

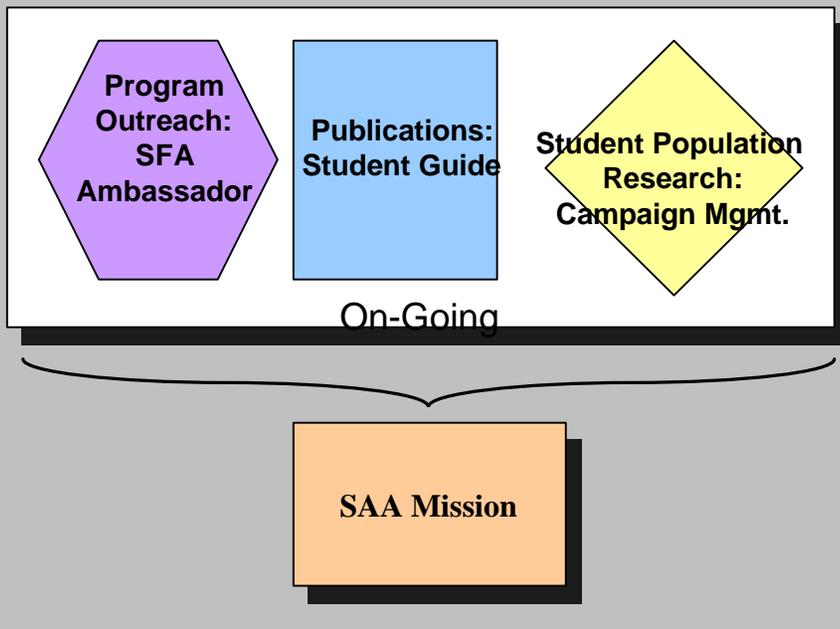


Define Program Mgmt. vs. Project Mgmt.

Program Management

The discipline of managing multiple projects that share the same vision in order to ensure that the organization's objectives are achieved.*

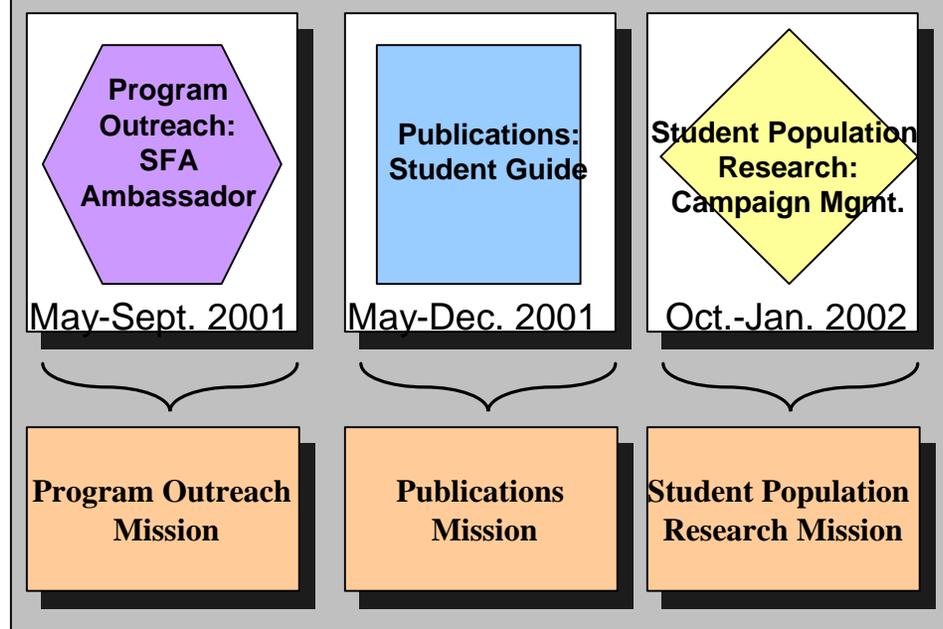
Managing aligned projects sharing the same vision on an on-going basis



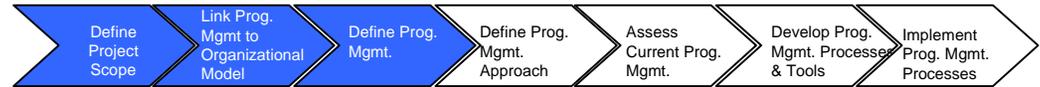
Project Management

The application of knowledge, skills, tools and techniques to a broad range of activities in order to meet the requirements of the particular project.

Managing temporary, individual projects with different visions with specific start and end dates



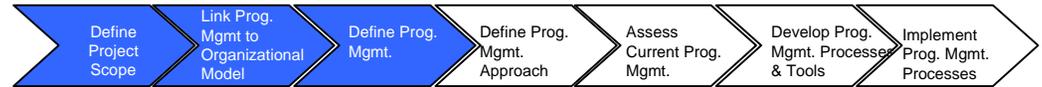
* The term program management will be used throughout the rest of this document to describe the overall approach. However, the recommended tools can be used to manage individual projects.



Benefits of Program Management

The development and implementation of a comprehensive program management approach enables Student Aid Awareness to:

- **Use repeatable processes that incorporate vision, goals and objectives to effectively plan, identify, deliver and track projects to measure results**
- **Clearly communicate and report key issues to management**
- **Manage, measure and monitor progress to ensure projects delivered on time and within budget in new organizational structure**
- **Set direction, make project decisions and measure results against SFA performance objectives:**
 - *Increase Customer Satisfaction*
 - Listen to and respond to customer needs
 - *Decrease Unit Cost*
 - Implement cost effective core processes
 - *Increase Employee Satisfaction*
 - Foster an environment for a better informed, proactive and empowered staff who can anticipate and meet customer needs
 - Create processes that take into account limited resources



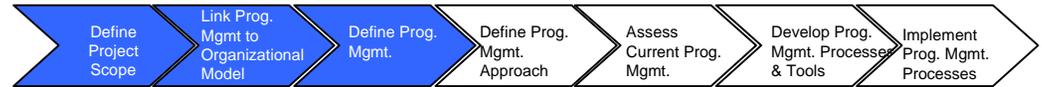
Best Practices

Successful organizations apply program management practices as a means to improving their business processes including:

- Planning initiatives
- Organizing and controlling their strategic initiatives
- Monitoring their performance
- Analyzing significant deviations
- Forecasting impact of deviations on the organization

Common Elements of Program Management

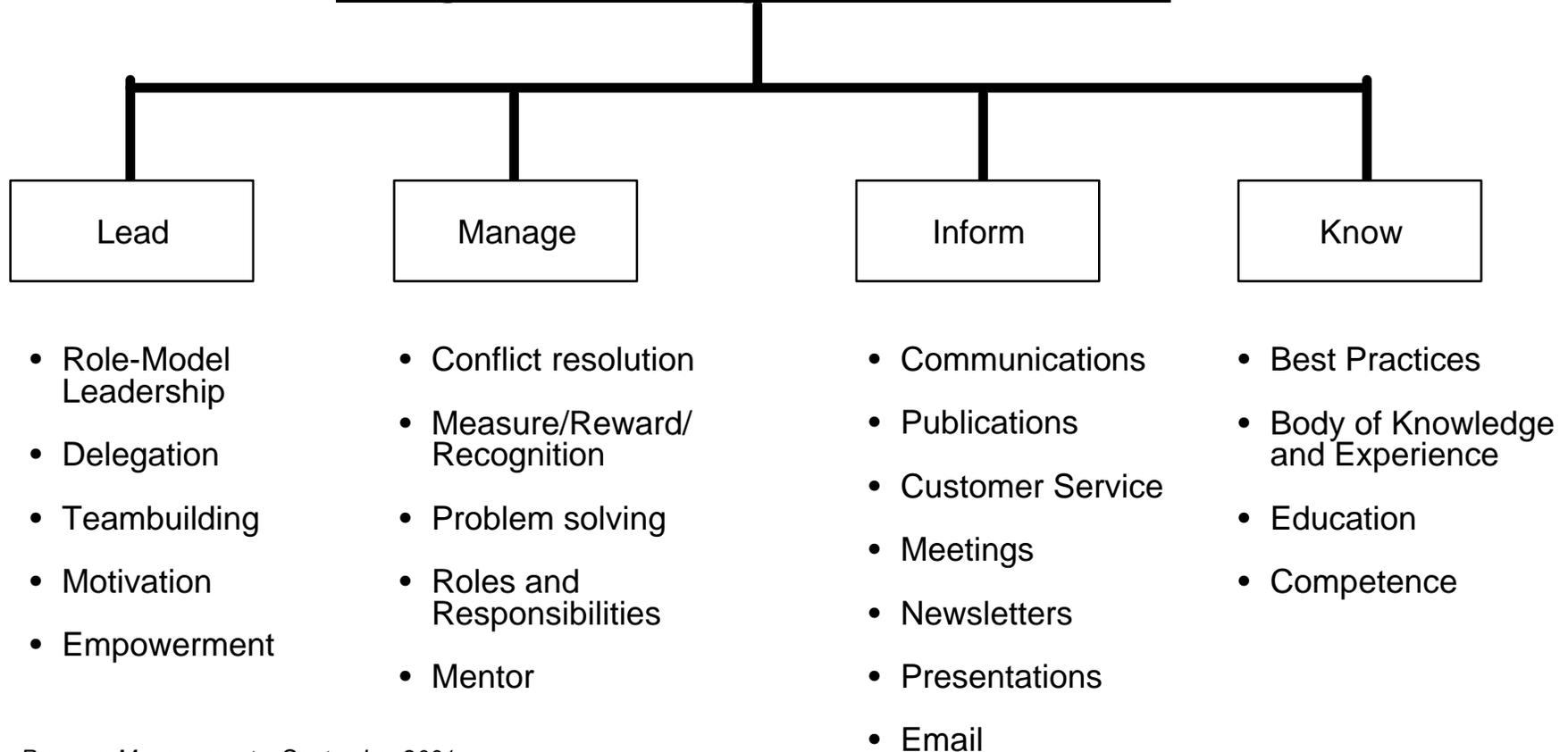




Best Practices

An effective program management approach requires the combination of leadership, management, information and knowledge.

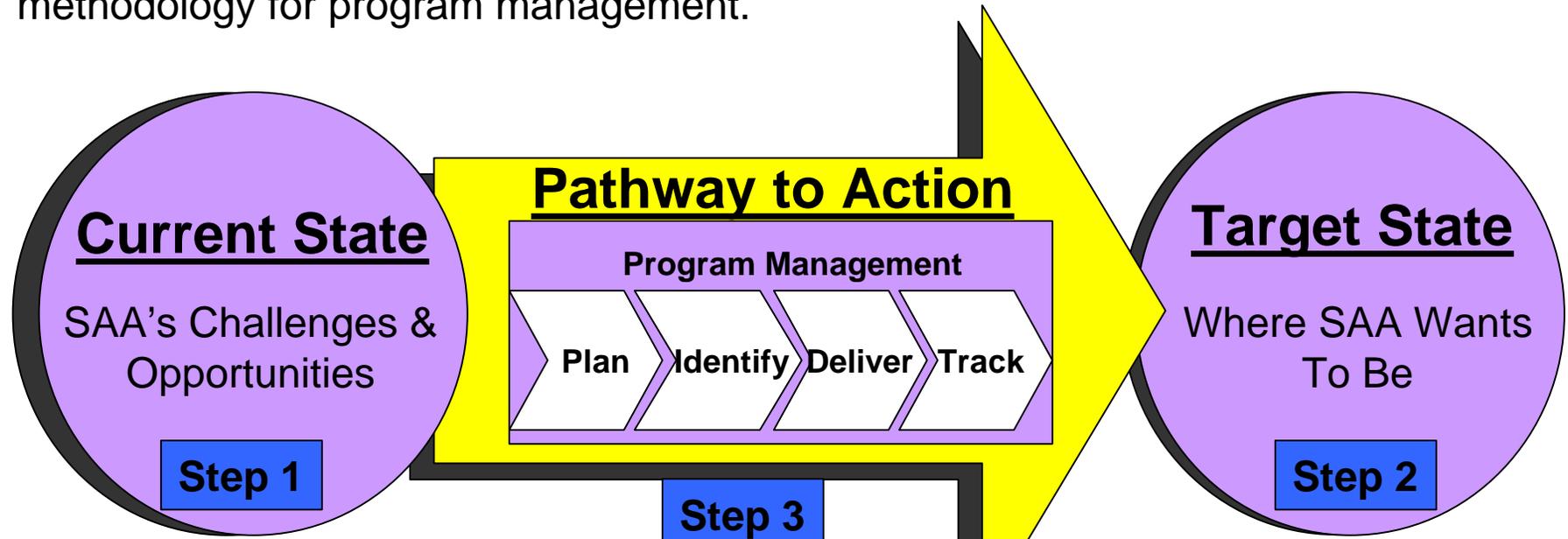
Program Management Process





Program Management Approach

The following approach was selected and adopted to provide a common methodology for program management.



Marketing Strategy:

- Target low-income
- Establish partnerships/network
- Distribute publications
- Attend conferences

Program Mgmt:

- Publications process flow diagrams
- Binder for project plans
- SFA performance measures (e.g. – Balanced Scorecard)

Program Mgmt. Approach:

1. Plan (Conceive/Define)
2. Identify (Develop)
3. Deliver (Perform/Close)
4. Track (Manage/Improve)

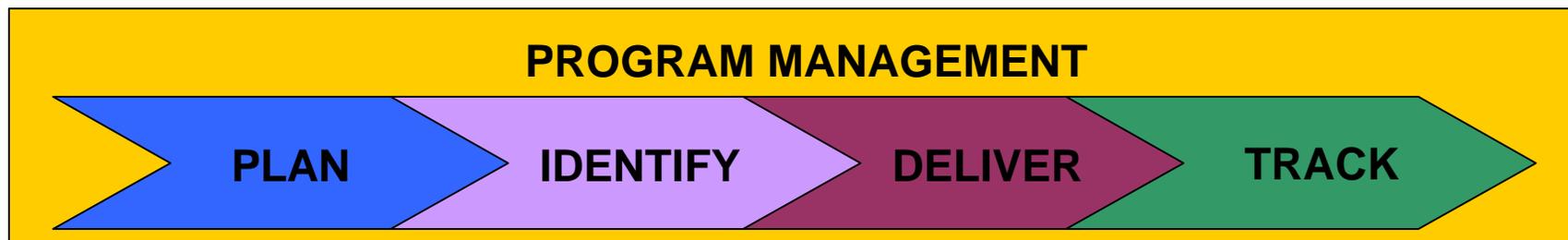
Implement Program Mgmt. Tools To Aid Marketing Efforts:

- Communications Management
- Budget Management
- Work Planning Management
- Project Planning Management



Program Management Approach

The pathway to action that will allow SAA to reach its goal of becoming a customer-focused organization includes a four step process supported by program management. The recommended tools focus on the planning and tracking phase.



- | | | | |
|---|--|--|--|
| <ul style="list-style-type: none"> ▪ Conceive/Define project goals ▪ Plan the results to be achieved ▪ Determine timeframe and deadlines ▪ Estimate financial and human resources | <ul style="list-style-type: none"> ▪ Develop project guidelines ▪ Identify project product (specific outcomes, results), schedule (definite start and end dates), resources (human resources, funds, equipment, facilities and information) ▪ Define roles & responsibilities | <ul style="list-style-type: none"> ▪ Form team and assign roles/responsibilities ▪ Set up necessary financial, personnel and tracking systems ▪ Announce project to organization ▪ Perform the tasks ▪ Address problems ▪ Share information with interested people | <ul style="list-style-type: none"> ▪ Manage and improve processes ▪ Monitoring actions taken and results achieved ▪ Get approval of final results ▪ Hold a post-project evaluation to recognize project achievements and discuss lessons learned |
|---|--|--|--|



Identify High Priority Program Mgmt. Needs

The following program management areas were identified as high priority needs within Student Aid Awareness.



Communications Management

To facilitate knowledge sharing and verify accuracy and value key messages.

Tools:

- SAA Summary Status Report
- Program Area Status Report
- Communication Plan



Project Planning Management

To enhance program efficiency and effectiveness through active management of project planning including conference preparation.

Tool:

- Conference Planning Checklist

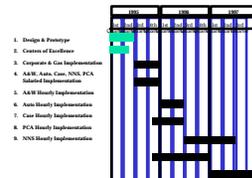


Budget Management

To balance decisions regarding budget to manage projects and provide the best value to the customer.

Tool:

- Budget Planning Checklist



Work Planning Management

To plan and manage the specific work tasks, schedule, etc. within a single project and provide an early warning system on execution issues allowing corrective action.

Tool:

- Work Plan



Next Steps

- Understand how program management can help aid campaign management efforts
- Implement and utilize program management tools and processes
- Confirm approach and revise program management approach as needed
- Identify future program management capabilities that address the plan, identify, deliver and track phases
 - Human Resource Management
 - Issue/Risk Management
 - Scope Management



Appendix A: Communications Mgmt. - SAA Summary Status Report

Tool:	<p>Summary status reporting template to report to Students Channel leadership that includes:</p> <ul style="list-style-type: none"> ▪ “Hot” Topics (Current) ▪ “Heads-Up” Topics (Future) ▪ On-Going Project Status 
Objective:	To provide accurate and timely information to Students Channel leadership on the progress and performance of each program area within SAA including accomplishments, planned activities, issues and risks
Value:	<ul style="list-style-type: none"> ▪ Ability to document status, issues and risks to update key stakeholders on progress ▪ Bring critical issues to management’s attention ▪ Provide a framework to organize project initiatives ▪ Ensure SAA is meeting performance goals according to timeframe ▪ Provide program managers the opportunity to communicate program status
Process:	The summary status report should be sent to the team facilitator via e-mail or accessed from a group share folder and delivered to Students Channel leadership on a weekly basis.
Responsibility:	Program managers are responsible for submitting status report to the team facilitator on a weekly basis. The team facilitator will be responsible for reviewing the individual status reports of the lead’s team members and compiling the information into the summary status report to share with Students Channel leadership. Students Channel leadership is responsible for reviewing the status report and taking any action necessary. Program managers are ultimately responsible for escalating issues needed and ensuring that issues are resolved within a timely manner to minimize risks.



Appendix B: Communications Mgmt. - Program Area Status Report

Tool:	<p>Status reporting template to use for Program Areas that includes:</p> <ul style="list-style-type: none"> ▪ Activity Summary ▪ Future Work Plans ▪ Schedule of Meetings ▪ Issue Summary ▪ Short-Term Action Plan Status 	
Objective:	To provide accurate and timely information to the Director of Aid Awareness on the progress and performance of each program area in Student Aid Awareness including accomplishments, planned activities, issues and risks	
Value:	<ul style="list-style-type: none"> ▪ Ability to document status, issues and risks to update key stakeholders on progress ▪ Bring critical issues to management's attention ▪ Provide a framework to organize project initiatives and measure and evaluate action plans ▪ Ensure SAA meeting performance goals according to timeframe ▪ Provide program managers the opportunity to communicate program status ▪ Provide information needed to maintain the work plan and report status ▪ Provide framework to Provide context for communication across programs 	
Process:	Program Managers should complete the program area status report on a weekly basis and send to the team facilitator via e-mail or accessed from the group-shared folder.	
Responsibility:	Team leads are responsible for submitting program area status reports. The Director of Aid Awareness will review the status reports and provide feedback as appropriate.	

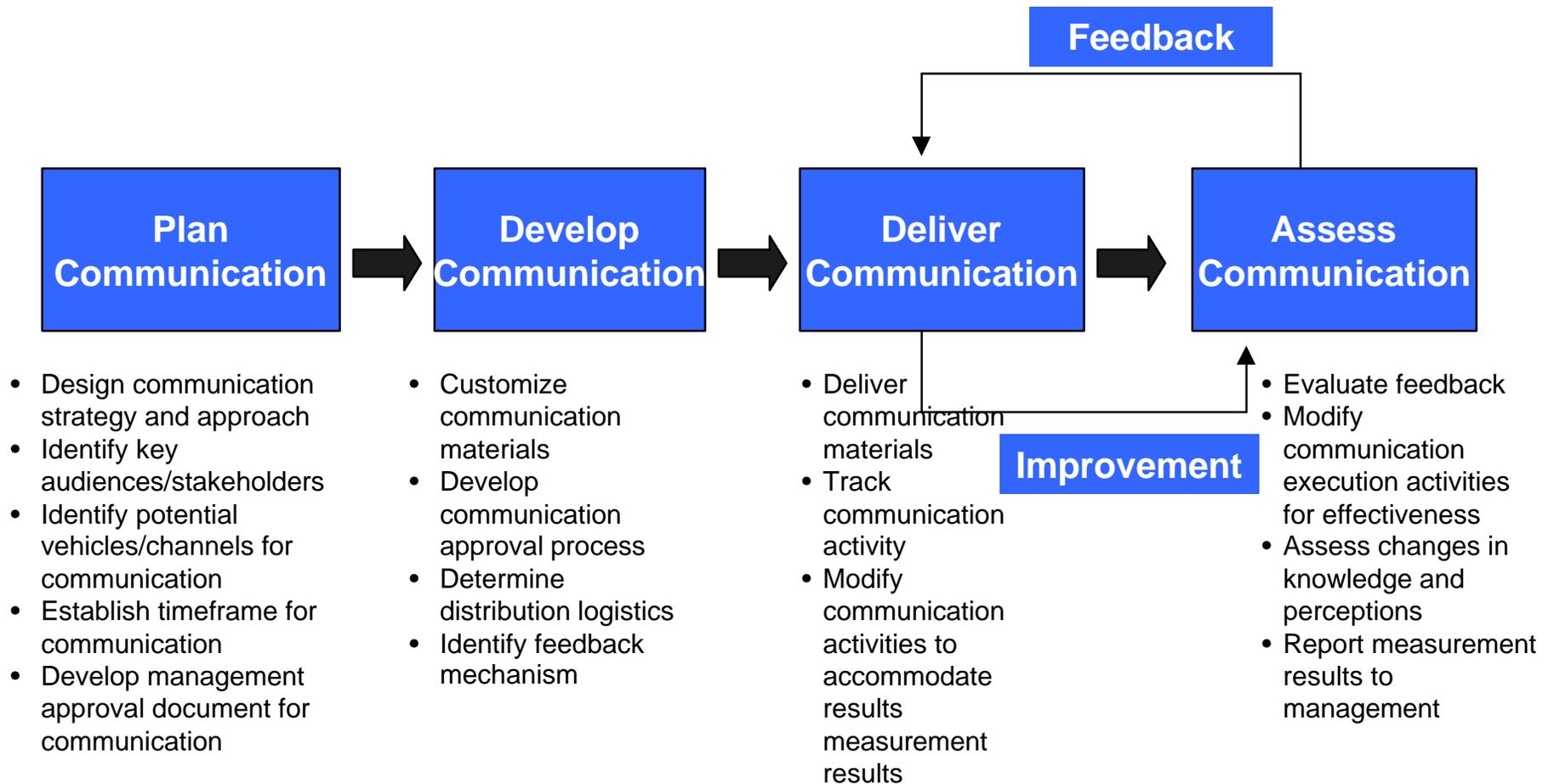


Appendix C: Communications Mgmt. - Communication Plan

Tool:	<p>Communication plan template to identify and plan messages for program personnel, sponsors, and other stakeholders in the program. The key elements include:</p> <ul style="list-style-type: none"> ▪ Communicators ▪ Audience Groups ▪ Messages ▪ Communication Channels (Face-to-face, paper-based, technology) ▪ Timing of Communication Events ▪ Feedback and Measuring Effectiveness 	
Objective:	To provide a framework for managing and coordinating the wide variety of communication that will directly or indirectly take place as part of SAA	
Value:	<ul style="list-style-type: none"> ▪ Ability to identify and plan messages to program personnel, sponsors and stakeholders ▪ Ensures effective cross-communication and collaboration between program areas ▪ Ensures relevant, accurate, consistent and timely information to appropriate receivers ▪ Establishes feedback channels and deters informal channels from conveying misinformation ▪ Manages sponsor and stakeholder expectations 	
Process:	The communication plan should be created during the planning phase after the program approach and work plan have been well defined. The communication plan should be reviewed on a weekly basis and shared with the team.	
Responsibility:	Program area managers should be responsible for completing a communication plan before each project. and updating it as needed.	



Appendix C: Communication Planning Process





Appendix C: Communication Planning Principles

Principle	Reason
Credibility	Without a credible communication approach, individuals will simply not believe in the end goal
Commitment to goal	Promotes ownership of the program, feeling a necessary part of the program
Communicators whom people trust/respect	If the staff does not trust or respect the communicators, the messages 'fall on deaf ears'
Visible management support	<i>Active</i> management commitment gives credibility to communication. Must be seen to demonstrate support
Face-to-face communication	Audience is involved, communication is two-way and provides a feedback mechanism
To avoid information 'overload'	Too much information leads to confusion/irritation thus accurate/timely information is key
Consistent messages	Inconsistency loses credibility in the program. Without consistency, audiences are confused and frustrated about what to expect
To repeat messages and vary mechanisms	The more ways a message can be communicated, the more likely it is to be internalized. Using different mechanisms ensures repetition without individuals 'switching off'
To create demand	Encouraging team to <i>pull</i> for information, rather than management <i>pushing</i> it at them
Ensures buy-in to the change	Tailor communication to audience needs
Give information which <i>audience</i> wants, not what <i>you</i> want to tell	Makes information 'real' to the audience. The audience are more likely to listen if the information is pertinent to their current frame of reference
Central co-ordination	Ensures consistent approach
Manage expectations	Encourages audience to believe in what you to tell them.
Listen and act on feedback	Encourages support in the approach by being responsive to the needs of the audience. Ensure approach meets changing audience needs



Appendix D: Budget Planning Mgmt. – Budget Planning Checklist

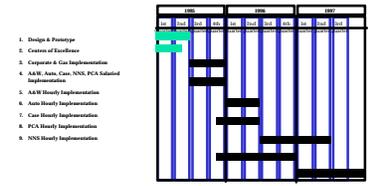
Tool:	<p>Budget planning template to coordinate projects and prevent resource expenditures from exceeding budget. The key elements of budget planning include:</p> <ul style="list-style-type: none"> ▪ Personnel Costs ▪ Administrative Costs
Objective:	To provide a framework for identifying financial and resource needs to support projects
Value:	<ul style="list-style-type: none"> ▪ Establishes a cost baseline for measuring project performance and obtaining management approval for that baseline ▪ Ability to plan what financial and human resources needed to execute project
Process:	Budget planning should be used during the planning phase and used throughout the lifecycle of the initiative.
Responsibility:	Program area managers are responsible for submitting their budget planning information to Students Channel leadership to secure funding.





Appendix E: Work Planning Mgmt. – Work Plan

Tool:	<p>Work planning template to document a project schedule and milestones. The key elements of a work plan include:</p> <ul style="list-style-type: none"> ▪ Breakdown of work to be completed during a specified time period ▪ Status ▪ Timeframe ▪ Objectives ▪ Resources
Objective:	To provide a method for allocating and managing major units of work, tasks, people and time that are required to complete a project
Value:	<ul style="list-style-type: none"> ▪ Provides a framework for SAA to develop project tasks and track project progress including work breakdown structure, schedule tracking, resources required and timeline ▪ Provides a means to quickly and continually assess the progress of the project and each associated task
Process:	<p>Work planning should be considered during the planning phase and utilized until the completion of the project. The work plan should be updated on a bi-weekly basis and sent to the project facilitator through e-mail. The work plan should be used as a schedule reference when completing the status reports. Work plans can be created using Microsoft Excel or PowerPoint. Work plans are developed based on estimates and updated according to actuals.</p>
Responsibility:	Program area managers are responsible for developing and managing the work plan for each project.





Appendix F: Project Planning Mgmt. – Conference Planning Checklist

Tool:	<p>Conference planning checklist to plan for conferences. The key elements of conference planning include:</p> <ul style="list-style-type: none"> ▪ Purpose of conference ▪ Organizing logistics ▪ Determining what messages to convey and materials to bring
Objective:	To provide a repeatable process for planning and organizing conferences related to SAA
Value:	<ul style="list-style-type: none"> ▪ Provides a framework to plan, coordinate, and manage conference participation ▪ Provides effective method for promotion, advertising and receiving direct customer feedback ▪ Help with planning skills and provide an overview of the elements of a successful conference and common practices accepted by meeting planning and convention industry
Process:	<p>Conference planning should be considered during the planning phase and utilized until the completion of the project.</p> <ul style="list-style-type: none"> ▪ Establish your purpose in attending the conference (Bring relevant materials) ▪ What do you hope to accomplish by attending the conference? (What key messages will you share?) ▪ Understand the purpose of the conference ▪ Learn the needs of your target audience (Surveys are helpful to determine needs)
Responsibility:	Program area managers are responsible for overseeing the conference planning process.

