



Memorandum

To: Anne Teresa, FSA

From: Howard Weitzner, Accenture

Date: March 29, 2002

Subject: Deliverable 95.1.1b Training Services Summary

Purpose

This memo summarizes the results of Training Services provided to FSA University during the period March 1 – March 31, 2002. The results were delivered through supporting materials and working sessions with FSA University staff. The work effort addressed improvements to FSA University's training services, processes and systems.

Initiatives this Period

Specific initiatives addressed during this period included:

- FSA University strategic planning and organization development
- Training development and delivery methodology/process team
- Delivery cost assessment
- Learning consultant
- Needs assessment
- Effective teams
- eProject
- Corporate university conference
- University services reorganization

Planned Initiatives

During the period April 1 – April 30, 2002, the following initiatives may be addressed, but not limited to:

- FSA University strategic planning and organization development
- Training development and delivery methodology/process team
- Delivery cost assessment
- Learning consultant
- Needs assessment
- Effective teams
- University services reorganization

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Description of Initiatives

FSA University strategic planning and organization development

Underlying several initiatives is ongoing support for FSA University's efforts to develop and enhance its organizational effectiveness. Activities continue to focus on aligning FSA University's activities with the strategic goals of the organization. For example, support is ongoing for partnering with the TDC as well as action team support to help each team complete major segments of work. Next steps may include enhancing the rigor and accountability of action team status reporting and milestones review.

Training development and delivery methodology/process team

The Training Development and Delivery team supports the creation and implementation of best practices for how FSA University develops and delivers training. The methodology (Plan, Design, Build, Deliver, Assess) follows a customized version of the ADDIE model (Analysis, Design, Develop, Implement, Evaluate).

During this period, the process team conducted a review session with its sponsor and other advisors. Based on their feedback, the team updated Plan and Design phase documents. Working in pairs, the team is developing materials for the Build, Deliver, and Assess phases of the process. When these are complete, the team will reconvene for a final review session of job aids and templates for the process.

Specific activities during this period included:

- Review and refinement of materials for the Plan and Design phases
- Formal review of materials with project sponsor and advisors
- Continued support of the training development teams
- Initial development of the Build phase approach and materials

The next phases of work may include:

- Development of evaluation tools and techniques
- Development of Build, Deliver, and Assess phase materials
- Initial development of materials for introducing the process to training teams
- Development of the deployment strategy for the training process
- Final review of materials by training process team

Delivery cost analysis

The cost analysis team adheres to the FSAU operating model, Plan, Design, Build, Deliver, and Assess. During February and March, the team finalized the necessary tasks and next steps to complete the Build phase of the tool by the end of March. This included finalizing the cost driver definitions, summary reports, and the instructions for data entry. The cost analysis team determined (at a high level) stakeholders to create a communication strategy for the tool. This includes an internal FSAU review, manager demonstration, and general

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deployment. Additionally, the team will pilot the tool and perform the data analysis for Fiscal Management Training (FMT) in April. The team will develop recommendations and evaluate and/or revise the cost analysis model approach based on these findings.

Activities during this period included:

- Review and revision of the tool
- Formula validation
- Development of instructions for data entry
- Completion of version 1.0 of the tool

Specific activities in the next period will include:

- Identification and development of communications required to deploy the cost analysis model
- Prepare to pilot the Fiscal Management Training (FMT) for analysis
- Demonstrate the tool to FSAU staff member and at the manager's meeting
- Evaluate tool version 1.0 success and revise approach

Learning Consultant

During this period, the learning consultant team further developed its marketing and deployment approach. This includes a training plan, a needs assessment approach, and an overview of the proposal process flow. The proposal development process flow illustrates the activities from the initial needs assessment conversation through editorial review board approval, development of the detailed proposal, submission to the customer, and project delivery. It includes estimated timeframes and steps within the process.

During the upcoming period, activities will focus on identifying potential opportunities for FSA University to conduct needs assessments and assist teams or units in achieving their performance goals.

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Needs Assessment

In cooperation with the Learning Consultant team, the needs assessment project continued to define its scope. To enable learning consultants to identify performance needs and conducts needs assessment, the team created a preliminary needs assessment interview protocol. This protocol outlines questions and techniques to gather necessary information and consult teams regarding their performance needs and recommend appropriate solutions.

Effective Teams

During this period, the Effective Teams initiative focused on providing one-on-one facilitation coaching and transitioning knowledge to FSA U Effective Team's Champion. As part of the Phase I: Meeting Skills activities, the team conducted a lessons learned close out session with all pilot team leads to gather feedback for future roll out. During this period, the team also planned its Phase II: Project Planning & Management work which will focus on project planning, project management, and status reporting. Specific activities included:

- Provided coaching to team leads on building agendas and facilitating agreement
- Conducted Phase I: Meeting Skills Close Out Session with pilot team leads
- Created project plan and milestones for Phase II work
- Identified and obtained acceptance for Phase II pilot team lead participation
- Researched and identified project management tools
- Created project management templates for FSA U
- Created a timeline and milestones chart templates
- Presented and obtained acceptance from managers on Phase II work

eProject

Requirements and pricing are being researched for potential use of eProject for FSA University. The training development process team and LMS teams have piloted the tool through the Modernization Partner. Its future use through FSA University could include training development teams and broader use across the organization.

Corporate University Conference

A custom developed workshop on Corporate Universities was delivered to a group of FSA University managers and staff on March 12 - 13 at the Accenture training facility in St. Charles, IL. The purpose of this conference was to identify, present and apply industry best practices to FSA University. The conference focused on the following topics:

- Overview of Accenture Corporate University
- Leadership Development
- Curriculum Planning

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- **Communications and Marketing**

A debrief session was held to review the key concepts and learnings from the conference, which began an ongoing dialogue about certain issues and considerations for FSA University. Ultimately, this will lead to recommendations for FSA University regarding the applicability of approaches discussed in St. Charles.

University Services Realignment

Support has been provided for the realignment of tasks and personnel within the University Services group in FSA University. By applying a best practice approach for organizational development, the functions within University Services may be realigned to focus the right people on the right tasks. Further support may include capability development, process improvement and reporting relationships.

Observations/Recommendations

During the period March 1 – March 29, the following observations were identified and will be reviewed to determine the potential impact/value for FSA University:

- FSAU could review online tools such as Realize and Indeliq for applicability within the organization. These tools could enhance leadership development and offer performance simulation.
- Employees could benefit from the establishment of clear expectations, both within a given role and over the course of a career. A curriculum or overall training program could be designed to offer guidelines and suggestions for training at certain levels, enabling employees to develop skills and map progress. One element of this could be the re-activation of the individual development plan, created in cooperation between employees and their managers.
- Identifying FSA University's core products and services will benefit many other initiatives throughout the organization, particularly the development of the learning consultant role. With this tool, FSA University representatives could more effectively "sell" the FSAU offerings, increasing visibility and credibility across organizations within FSA.

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Attachments:

- Training Process Team
 - Training Process Team Design phase review session agenda
 - Updated Gantt – now the “Training process checklist”
 - Updated Plan phase templates and job aids
 - Updated Design phase templates and job aids
 - High-level Build phase outline
- Cost Analysis
 - Version 1.0 of the cost analysis tool
- Learning Consultant
 - Learning Consultant overview presentation
- Needs Assessment
 - Interview protocol
- Effective Teams
 - Phase I Closing Session Training Design Plan
 - Phase II Workplan
 - Phase II Timeline & Milestones Chart
 - Workplan Template
 - Milestone Timeline Template
 - Project Management Tools Chart
- Corporate University Conference – Accenture training facility – St. Charles, IL
 - Agenda
 - Indeliq presentation
 - *Accenture Education Overview* presentation
 - *Learning Curriculum Planning for the Government Market Unit* presentation
 - *Communications* presentation
 - *Shifting from Learning to Performance* presentation
 - *MyLearning Decision Support Reporting* presentation
 - *Professional Development Program and Leadership Overview* presentation
 - St. Charles site visit notes
 - Debrief session agenda