



Memorandum

To: Anne Teresa, FSA

From: Howard Weitzner, Accenture

Date: June 28, 2002

Subject: Deliverable 95.1.1e Training Services Summary

Purpose

This memo summarizes the results of Training Services provided to FSA University during the period June 1 – June 28, 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 analysis tool
- Performance consultant
- Effective teams
- Resource planning
- LMS support
- HR support

Planned Initiatives

During the period July 1 – July 31, 2002, the following initiatives may be addressed, but not limited to:

- FSA University strategic planning and organization development
- Training team(s) support
- Delivery cost analysis tool
- Performance consultant
- Effective teams
- Resource planning
- LMS support
- HR support

Subject: Deliverable 95.1.1e Training Services Summary; June 28, 2002

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. A "retreat" was conducted during which Accenture, PSG and FSA University met to confirm the strategy for securing FSA University's role in transformation. The identified actions support new and existing initiatives to position FSA University as a strategic partner to the organization. Further support will be provided to help FSAU segment its dual roles as service provider and integrator/advisor.

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 its final review of process materials with stakeholders and advisors. This feedback session was both productive and positive, leading to a final round of edits. With approval of this draft, the team is refining materials for publication. During July, the communications team will further polish the final product, which will then be available to training teams in its completed format. Training process team representatives continue to work with individual training development teams, coaching them through the process and supporting their planning and development efforts.

Specific activities during this period included:

- Stakeholder review of materials for all phases
- Refinement of final materials
- Further development of the deployment strategy for the training process
- Training development team coaching

The next phases of work may include:

- Completion of final materials
- Packaging of materials for use by training teams
- Development of workshop for training team leads

Subject: Deliverable 95.1.1e Training Services Summary; June 28, 2002

Delivery Cost Analysis Tool

The cost analysis team has developed a Cost Analysis Tool (CAT) to facilitate the gathering and analysis of training cost data. This information will be used to reduce costs and optimize efficiency of future training teams. The CAT tool adheres to the FSAU operating model: Plan, Design, Build, Deliver, and Assess. During this performance period, the team focused on the Deliver and Assess phases. Additionally, the team continues to define a deployment strategy for the CAT tool. The team continues to work with the Training Process team to identify an approach for team leads and CORs to effectively manage teams by utilizing information/reports from the CAT.

Next month, the team plans to continue integrating the tool with the training process deployment and will deliver the overview presentation at the July FSAU All Hands meeting.

Activities during this period included:

- Support the collection of final cost data and development time for Fiscal Management Training (FMT)
- Work with Training Process team to define role of CAT
- Review and revision of the tool, creating version 1.3

Specific activities in the next period may include:

- Demonstrate the tool to FSAU staff members at the July All Hands meeting
- Work with Training Process team to define possible role of CAT in the process
- Deliver tool version 1.3
- Assess FMT training course costs and determine areas where costs can be reduced
- Collect assumption data for Tools for Ensuring Program Integrity training (TEPI)
- Introduce the CAT tool to training team leads, as training teams are kicked-off
- Assess tool version 1.3 success and revise approach

Performance Consultant

During this period, the performance consultant team further developed the Proposal Request Form and Review Board processes. To enhance collaboration across efforts, the team met with the Resource Planning team to discuss how their approaches interact. The team also created a tracking document to monitor incoming and ongoing proposals. In the next phase of work, the team will build on draft assignments of performance consultants and their support to ensure proper marketing to channels and units. Support was provided to the Review Board to assist FSAU respond and secure opportunities to provide services to the organization.

Subject: Deliverable 95.1.1e Training Services Summary; June 28, 2002

Effective Teams

During this period, the Effective Teams initiative focused on implementing status reporting across the organization. The team conducted a series of formal training sessions and provided one-on-one coaching to each FSAU team lead. In addition, the team continued to provide project management and planning coaching to the pilot team leads. Other activities included:

- Conducted Phase II Close Out/ Lessons Learned Session with Pilot Team Leads
- Provided one-on-one coaching to team leads on project planning and management
- Discussed industry best practices with FSA Director and Chief of Staff for reviewing status reports and providing feedback to team leads
- Continued to work with FSA U Chief of Staff to refine and implement the dashboard reporting process
- Conducted Project Management and Status Reporting Training Session for all FSA Team Leads
- Provided one-on-one coaching/support to FSA U Team Leads creating a status report
- Developed Status Reporting Job Aid
- Distributed project management templates and status reporting "tips-of-the-week" to FSA U staff
- Incorporated Training Process Design Team with PICT Training Team. Continued to work with the PICT Team to provide coaching and coordinate efforts of each training session
- Confirmed participants for Covey Project Management Training on June 20-21

Resource Planning

The Resource Planning Initiative kicked off this period to streamline and implement the staffing tool developed during the Action Planning exercises conducted in October 2001. Resource Planning focuses on helping FSA management identify and monitor staffing allocation and availability. In addition, the team is creating a series of tools and processes to aid the management team predict the need and availability for future projects. During this period, the team developed a strategy to roll out the initiative and met with key stakeholders. Other activities included:

- Developed Resource Planning Overview Presentation
- Gathered feedback and obtained ownership of Resource Planning from FSA Chief of Staff
- Developed process to implement Resource Planning
- Defined roles of each stakeholder involved in the process
- Presented proposed Resource Planning Tools and Processes to FSA Director
- Presented proposed Resource Planning Tools and Processes to Review Board Team Lead to coordinate efforts
- Presented proposed Resource Planning Tools and Processes to Homeroom Team Lead to coordinate efforts

Subject: Deliverable 95.1.1e Training Services Summary; June 28, 2002

LMS Support

With the LMS operational, FSA University Services personnel have assumed responsibility for the day-to-day training and system administration. As questions and issues have been raised, ad-hoc support in the areas of reporting, usability and security have been provided. In partnership with FSA CIO, FSA University and Jamcracker a resolution for the user directory issue was implemented and tested. In addition, support regarding customer feedback, and the LMS “mad-dog” team has been provided.

Human Resources Support

The Homeroom Concept was developed and introduced to FSA University leadership and managers. The Homeroom Concept is a human resources process that will enable a more flexible work environment and maintain supervisory relationships while employees receive enhanced performance coaching from project leads. Questions and discussion points will continue to be answered and incorporated as the initiative moves from conceptualization to implementation. Currently, a listing of critical next steps and an implementation plan are in development. This will detail the timeframe, milestones and sequential actions to be taken.

Observations/Recommendations

During the period June 1 – June 28, the following observations were identified and will be reviewed to determine the potential impact/value for FSA University:

- Collaboration among teams can enhance the results of individual projects. For example, the shared information between the performance consultant, Effective Teams, and resource planning initiatives strengthens each by clarifying sequencing, dependencies, and hand-offs. The same is true of other efforts, including the training process team, where different efforts can benefit from the tools and processes of another.
- Similarly, it would benefit all teams if those upon whom they rely for information or feedback were responsive to their requests for input. When possible, review requests and other inquiries should be answered in a timely way.
- New training team leads should be trained on the entire training process, so to put each phase in greater context. This should include effective teams and fiscal responsibilities, so to enhance collaboration among teams and deepen the understanding of team expectations. To further extend the reach and value of the process, such training could also be shared with operating partners, communications, and logistics representatives.
- FSA University should continue to formalize its role as advisor/integrator. This is a dual role, independent from its role as a service provider. The advisor/integrator role provides FSA University the opportunity to help its customers (channels, enterprise units) define their approach for achieving the transformational components associated with their strategic initiatives.

Subject: Deliverable 95.1.1e Training Services Summary; June 28, 2002

Attachments:

- Training Process Team
 - Checklist
 - Phase overviews
 - Phase flow chart
- Cost Analysis
 - Flow chart
 - Updated develop budget job aid
- Performance (Learning) Consultant
 - Updated proposal request form
 - Proposal tracking sheet
- Effective Teams
 - Effective teams phase II group A/B training
 - All you ever wanted to know about status reporting
 - Effective teams phase II closing session training design
 - Quotes from pilot team lead's during phase II
 - PICT team agreements and roles
 - PICT touchpoint outcome summary
 - PICT weekly touchpoint 5/22/02
 - PICT weekly touchpoint 5/29/02
 - PICT weekly touchpoint 6/04/02
- Resource Planning
 - Resource planning agenda 6/13/02
 - Resource planning overview
 - FSAU resource request form
- HR Support
 - The homeroom concept
 - The homeroom concept: An example