



Memorandum

To: Anne Teresa, FSA

From: Howard Weitzner, Accenture

Date: September 30, 2002

Subject: Deliverable 95.2.1b Training Services Summary

Purpose

This memo summarizes the results of Training and Organizational Development Services provided to FSA University during the period September 1 – September 30, 2002. The results were delivered through detailed supporting materials and working sessions with FSA University staff. The work effort addressed improvements to FSA University's training services and organizational design.

Initiatives this Period

Specific initiatives addressed during this period included:

- FSA University strategic planning and organization development
- Training development and delivery methodology/process team
- Training development team support
- Schools curriculum planning
- Delivery cost analysis tool
- Performance consultant
- Resource planning
- LMS support
- Share Fair

Planned Initiatives

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

- FSA University strategic planning and organization development
- Training development team support
- Schools curriculum planning
- Delivery cost analysis tool
- Performance consultant
- Resource planning
- LMS support
- Human Resources support
- Share Fair

Subject: Deliverable 95.2.1b Training Services Summary; September 30, 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. Ongoing support continues to be provided to help FSAU segment its dual roles as service provider and integrator/advisor. Activities this period focused on defining FSAU's priorities for FY03, in light of budget constraints. Also, support was provided to assist FSA University establish its point-of-view regarding workforce development for ED at-large. An initial capability building strategy was drafted and will be further defined in the upcoming period.

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 completed the final version of the process materials. The process materials will be featured on the FSA University website as a product/service and provided to all training development team leads. The entire process team gathered with Anne Teresa to conduct a lessons learned session and celebration of the successful completion of the training development and delivery process.

Specific activities during this period included:

- Completion of process materials
- Further development of the deployment and packaging strategy for the training process
- Conducted team lessons learned and celebration session

The next phases of work may include:

- Packaging of materials for use by training teams
- Development of workshop for training team leads
- Continued deployment of process and corresponding materials

Subject: Deliverable 95.2.1b Training Services Summary; September 30, 2002

Training Development Team Support

Representatives of the Training Process Team serve as coaches to training development team leads. In this capacity, coaches assist team leads with project planning and management, creation of meeting agendas, and facilitation of team gatherings. Through this, coaches educate team leads on the training process itself, including both instructional design and project management elements.

Teams currently working with coaches include:

Delivery System training

- The Delivery System team, led by Linda Burkhardt, continued in the Build phase in September. Katie Malague, the team's process coach, worked with Linda to develop the team's project management tools, including the status report, milestone chart, and workplan. As the team nears its testing phase, in which it will conduct a pilot session, its next steps include continuing the appropriate content reviews by sponsors and stakeholders, building course materials, and formalizing logistical considerations for the course.

FFEL / Direct Loan / Perkins training

- The training effort is underway to clear confusion among FFEL, Direct Loan, and Perkins loan programs. The team, led by Pennie Summers, will enhance interactivity on existing Direct Loan training materials for the Debt Collections office in Atlanta. During this period, additional stakeholders have been identified. As a result, the scope of this project is still being defined. In the next month, a meeting will be conducted to flush out the details of the project.

Schools Curriculum Planning

A new team has formed to determine a standard approach for developing external partner (schools) training curriculum and schedule. As part of this process, the team will create the next year's curriculum and determine its schedule. In the end, this will result in the creation of a course catalog outlining course offerings over a series of years. The catalog would have a companion schedule that lists the frequency and dates when certain courses would be offered. In effect, this establishes different levels of training, beginning with a "100 Series" of basic or required information for all schools.

During this period, the team focused on the following initiatives:

- Identify past, existing, and current course offerings
- Identify content, audience, delivery method, and frequency of these offerings
- Create a timeline of these courses, plus elements that may have prompted their development, such as new regulations, systems, and processes

Subject: Deliverable 95.2.1b Training Services Summary; September 30, 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 FSA University operating model: Plan, Design, Build, Deliver, and Assess. During this performance period, the team focused on the Phase 1 lessons learned, i.e. purpose, successes, challenges and potential next steps. The team concluded that Phase 1 of the CAT was successful and that a significant amount of work and effort was put in to the development process. Next month, the team should start to evaluate options for Phase 2 of the CAT. Ad hoc support will continue to be provided as the FSA finance team uses the tool:

Activities during this period included:

- CAT team met to discuss the lessons learned from Phase 1 and to brainstorm options for Phase 2

Specific activities in the next period may include:

- Work with Training Process team to define possible role of CAT in the process
- 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
- Work with Debbie May to incorporate the CAT into the One-ED effort

Performance Consultant

The Performance Consultant process is FSA University's service delivery model, through which FSA University supports the strategic priorities of the Channels and other Enterprise Units. During this period, the performance consultant team prepared and presented a briefing to the FSAU All-Hands meeting. This presentation emphasized that all FSAU staff members serve as points of contact for channels and units seeking performance support, and they share those opportunities with performance consultants to develop a proposal. The team also updated its scorecard measures to add specificity and clarity. In the next period, the team will begin to transition work to a new team lead, Dwayne Rumber.

Resource Planning

The Resource Planning initiative focused on further defining and clarifying the resource planning process. In addition, the team continued to work with the FSAU team lead to integrate the resource planning process with other new and existing procedures and provided coaching on the roll out strategy. The Resource Planning initiative supports the organization's need to maximize and report the utilization of staff time.

Subject: Deliverable 95.2.1b Training Services Summary; September 30, 2002

LMS Support

With the LMS operational, FSA University Services personnel have assumed responsibility for the day-to-day training and system administration. Ad-hoc support continues to be provided to FSA University as they operate the LMS. Specifically, support is provided to the LMS “Mad Dog” team, the LMS Navigation Assistance team. The Modernization Partner continues to interface between FSA University and the vendors (Jamcracker and Saba) as needed to facilitate resolution of issues. Specific activities this period included:

- Support for the Financial Partners training use of the LMS has been completed with the product loaded on the LMS, processes defined and the creation of a customized report.
- The animated demonstrations (Robodemos) were updated to reflect changes requested by FSA University. Refer to the previous deliverable for an itemized list of these demonstrations.
- The animated demonstrations were added to the system Login screen by the vendor (Jamcracker) and the Modernization Partner.
- Support was provided related to FSAU’s implementation of the Service Pack provided by Saba.

Share Fair

Materials were gathered for the FSA Share Fair to be held October 2. During the Share Fair there will be a Modernization booth co-hosted by FSA CIO and the Modernization Partner. This booth will showcase enterprise-wide Modernization activities and their business impact for FSA. Personnel from the Modernization Partner are gathering materials for the booth and will provide on-site support during the Share Fair to explain the role and impact of Modernization to attendees.

Observations/Recommendations

During the period September 1 – September 30, the following observations were identified and will be reviewed to determine the potential impact and value for FSA University:

- As the stewards of workforce development for FSA, FSA University should partner with the Channels to development capabilities at all staff levels. Modernization projects and other initiatives focus on task specific skills, a broader focus on job capabilities will assist FSA employees become job ready in addition to task competent.
- Several new processes have been recently implemented within FSAU. As new approaches are considered and solidified, a critical success factor is to achieve results. This involves focusing on successful delivery of promised services and offerings. Proving FSAU’s delivery capabilities will be significant to gain credibility and secure future opportunities to support the organization.
- When a proposal becomes a project, there is a need for project management coaching. Whether a training development team or another initiative, a coach could assist team leads in planning projects and kicking off new teams. This will enhance the efficiency of individual teams and support the development of meaningful results.

Subject: Deliverable 95.2.1b Training Services Summary; September 30, 2002

Attachments:

- Training Process Team
 - Final process manual
- Schools curriculum planning
 - Schools curriculum overview
- Cost Analysis
 - Lessons learned document
- Performance Consultant
 - Performance Consultant All-Hands briefing
 - Performance Consultant updated overview and scorecard
- LMS
 - LMS Sample Report for Product Registrations