



Memorandum

To: Anne Teresa, FSA

From: Howard Weitzner, Accenture

Date: July 31, 2002

Subject: Deliverable 95.1.1f Training Services Summary

Purpose

This memo summarizes the results of Training and Organizational Development Services provided to FSA University during the period July 1 – July 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
- Training development team support
- Delivery cost analysis tool
- Performance consultant
- Effective teams
- Resource planning
- LMS support
- HR support
- Virtual Classroom

Planned Initiatives

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

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

Subject: Deliverable 95.1.1f Training Services Summary; July 31, 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 helping FSA leadership to position themselves as a strategic partner with ED's office of management in preparation for providing input on a reshaped workforce development organization. As One-ED begins to be executed, support will be provided to assist FSAU respond to business case analyses as well as to establish FSA University's point-of-view on how ED should address training and workforce development.

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 its final version of materials. These documents were submitted to the FSAU Communications staff for formatting and polishing, after which they will be available in their final form for training development team leads.

Specific activities during this period included:

- Refinement and completion of final materials
- Further development of the deployment strategy for the training process
- Training development team coaching

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

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:

Subject: Deliverable 95.1.1f Training Services Summary; July 31, 2002

Delivery System training

- The Delivery System team, led by Linda Burkhardt, conducted its kick-off session in July. Prior to this meeting, Linda met with Katie Malague, who is serving as the team's process coach. During this gathering, Linda and Katie planned the initial steps of the project, including: completing the Training Request Form, identifying stakeholders, creating a workplan, creating a communication plan, and determining the agenda for the team kick-off session. The team's next steps include completing the task order, planning an instructional strategy (storyboarding) session, and arranging for appropriate content reviews by sponsors and stakeholders.

FFEL / Direct Loan / Perkins training

- A new 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. Sara Bray will serve as a process coach/instructional designer. The training is scheduled to be complete September 15.

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. The FMT training reports were presented to the FSAU managers for analysis. Additionally, the tool was presented to the FSAU staff at the July All Hands meeting.

Next month, the team plans to finalize the team lead cost data collection process and determine appropriate time frames. Finally, the data from Tools for Ensuring Program Integrity training (TEPI) will be gathered and entered into the tool.

Activities during this period included:

- Supported collection of Fiscal Management Training (FMT) cost and time data
- Delivered tool version 1.3
- Demonstrated the tool to FSAU staff members at the July All Hands meeting

Specific activities in the next period may include:

- Work with Training Process team to define possible role of CAT in the process
- 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

Subject: Deliverable 95.1.1f Training Services Summary; July 31, 2002

Performance Consultant

During this period, the performance consultant team further developed and coordinated its processes. While the performance consultant position represents the inception and development of a proposal, it also feeds several other FSAU initiatives, as proposals become projects. Collaboration between and among teams strengthens their individual processes, beginning with performance consulting. In the next phase of work, the team will document the overlaps and intersections among these efforts and support the Review Board to enable FSAU to properly respond to and secure opportunities to provide services to the organization.

Effective Teams

During this period, the Effective Teams initiative focused on providing one-on-one coaching and support for the project planning and status reporting across the organization. The team worked with the FSA Chief of Staff to further define the status reporting evaluation and communication process to the FSA Director. In addition, the team developed and implemented a transition plan for Effective Teams to the FSA Champion.

- Conducted Phase II close-out meeting with FSA Director
- Created Phase II final report and shared findings with FSA Director
- Provided one-on-one coaching to team leads on project planning and management
- Continued coaching FSA Chief-of-Staff on industry best practices for reviewing status reports and providing feedback to team leads
- Continued to work with FSAU Chief of Staff to refine and implement the dashboard reporting process
- Provided one-on-one coaching and support to FSAU Team Leads for creating a status report
- Coached FSA Effective Team's Champion on Career Zone Skill Exchange: Planning and Facilitating a Meeting
- Transitioned all Effective Teams materials to FSA Champion. FSA Champion has created a series of binders that will be used to duplicate the training sessions on a point-of-need basis
- Continued to work with the PICT Team to provide coaching and coordinate efforts of each training session. Established a regular status meeting for the PICT team going forward. Incorporated training process design team into future status meetings, as needed
- Solicited sponsorship from FSA Ambassador for Change for future Effective Teams activities

Subject: Deliverable 95.1.1f Training Services Summary; July 31, 2002

Resource Planning

The Resource Planning Initiative focused on building support from FSA managers and further defining the resource planning process. In addition, the team introduced the FSA Team Lead to the processes and provided coaching on the roll out strategy. Other activities included:

- Obtained agreement from FSA Chief of Staff on process to implement Resource Planning
- Defined roles of each stakeholder involved in the process
- Continued efforts to coordinate Resource Planning Tools and Processes with the Review Board processes
- Developed presentation for FSA managers
- Met with FSA Team Lead and Chief of Staff to clarify roles and responsibilities

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. Dedicated support has been provided this period to prepare the LMS team and implement changes required for the Financial Partners LaRS training registration. In addition, support regarding customer feedback, and the LMS "mad-dog" team continues to be provided. Quick hits have been identified and recommended to FSAU that, if implemented by FSAU, should substantially improve the customer's experience.

Human Resources Support

Progress continues at integrating the Homeroom Concept into both the existing and newly developed FSAU processes. Questions and discussion points will continue as details are finalized. FSAU will also begin participating in the performance planning or "Line of Sight" activity. This will demonstrate the direct correlation between performance objectives at the very highest level (in the President's Management Agenda) through those of the Department of Education, FSA, FSAU, and ultimately to a team's and an individual's contribution. All of the aforementioned performance factors are intertwined and this activity will enable FSAU to ensure they are appropriately aligned and performing in a manner consistent with the performance expectations set forth by this Administration.

Subject: Deliverable 95.1.1f Training Services Summary; July 31, 2002

Virtual Classroom

A virtual classroom is a distance learning software solution. In addition to enabling instructors and participants to communicate from multiple locations, it provides virtual meeting capabilities for small and large groups. In response to a request from FSA, an overview presentation and demos were prepared to introduce the potential of virtual classrooms to FSA. Sample features and requirements were identified to assist FSA prioritize the needs of the organization in advance of an investment decision on proceeding with a business case for virtual classrooms or a comparable solution.

Observations/Recommendations

During the period July 1 – July 31, the following observations were identified and will be reviewed to determine the potential impact and value for FSA University:

- FSAU should create a standard form to accompany training task orders. This standard form should be consistent with the training process and cost analysis requirements. For example, it should require operating partners to split their development and delivery efforts.
- The Plan phase financial process should be discussed with key players such as the finance lead, Chief of Staff, and External Partners manager. Expectations should be set regarding the yearly definition of training budgets and the communicated to team leads and CORs. The process should be documented and distributed throughout FSAU.
- FSAU should leverage the new skills and expertise of the FSAU Effective Teams Champion. The FSA Ambassador for Change will sponsor the Effective Teams initiative. He should work with the management team to identify new opportunities to expand the FSAU Champion role and responsibilities. The FSAU Champion should also consult with all new project team leads approved by the FSAU review board.

Attachments:

Attachments:

- Training Process Team
 - Binder – *FSAU Training Process*
- Training Development Team Support
 - Delivery System planning session agenda
- Cost Analysis
 - Plan phase – financial process
 - CAT version 1.3
- Effective Teams
 - Effective teams II milestones timeline
 - Phase II project evaluation
- Resource Planning
 - Resource planning overview
- Virtual Classroom

Subject: Deliverable 95.1.1f Training Services Summary; July 31, 2002

- Virtual classroom overview
- Virtual classroom overview (short)
- Virtual classroom features
- LMS Support
 - LMS quick hits