



## Memorandum

**To:** Anne Teresa, FSA

**From:** Howard Weitzner, Accenture

**Date:** December 31, 2002

**Subject:** Deliverable 95.3.1a Training Services Summary

### **Purpose**

This memo summarizes the results of Training and Organizational Development Services provided to FSA University during the period December 1 – December 31, 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 Process Team
- 100 Series planning
- Cost analysis tool
- Performance consultant
- Performance Planning Line of Sight
- Resource Planning
- LMS support

### **Planned Initiatives**

During the period January 1 – January 31, 2003, the following initiatives may be addressed, but not limited to:

- FSA University strategic planning and organization development
- Training development team support
- Training Process Team
- 100 Series planning
- Cost analysis tool
- Performance consultant
- Resource planning
- Performance Planning Line of Sight
- LMS support
- Learning Tracks

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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. Activities this period included:

- Development of a human capital approach that incorporates the FSA skill catalog and supports the full employee lifecycle.
- Review of an integrated workforce development model that may support FSA's and ED's capability development needs. Further discussion will focus on the integration of HR services to this model.
- Deliver process expertise to support the development of learning tracks for the Case Management team.
- Research and summary of federal intern programs at multiple agencies to be used by FSA as an input to revise the intern program.
- Advise FSA University management on how to support FSAU staff as the One-ED process is conducted.

#### ***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, several process team members met to discuss an updated version of the Training Process Checklist. The Training Process Checklist provides a high-level overview or steps involved for project and team leads. With the updated version, the checklist highlights the critical milestones and includes a section for the estimated due date for each item.

The next phases of work may include:

- Finalizing the updated Training Process Checklist
- Rolling out the training process manual to all project and team leads

#### ***100 Series Planning***

The 100 Series team refined its goals as follows: The Schools Curriculum Planning Team is developing a catalog of training and resources for financial aid professionals, starting with a "100 Series" as the initial core curriculum. The "100 Series" should provide the foundation knowledge that all new financial aid professionals need to acquire by the end of the first year. Its courses and learning opportunities should be offered throughout the year.

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To create a comprehensive list of courses and materials to be included in the 100 Series, the team created an advisor survey. Through the answers to the survey, the team will collect data regarding the learning needs of new financial aid professionals. Based on this information, the team will begin development of the “course catalog” for the series.

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

- Initial stages of defining the “100 Series” content
- Development of the advisor survey

Next steps for the 100 Series team include:

- Distribution of the advisor survey
- Gathering input from advisors through follow-up phone calls
- Identifying the appropriate courses for the 100 Series
- Determining basic design elements of each course (such as target audience, learning objectives, and high-level content)

### ***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. During this performance period, the team focused on the Phase 1 lessons learned, i.e. purpose, successes, challenges and potential next steps. This month the team pulled together TEPI data and began entering it into the CAT. Additionally, ad hoc support will continue to be provided as the FSA finance team uses the tool.

Activities during this period included:

- CAT team members began to gather and enter TEPI data into the CAT

Specific activities in the next period may include:

- Continue to gather and enter TEPI data into the CAT
- Begin to discuss the results of the TEPI data, potential lessons learned etc.
- Continue to introduce the CAT tool to training team leads, specifically during the training team kick-off meetings

### ***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 met to discuss an effective process for informing the managers about potential upcoming proposals. In the next period we plan to finalize and begin to implement the revised approach.

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**Performance Planning – Line of Sight**

Most FSA University teams have completed their Performance Planning “Line of Sight” sessions. In these meetings, the Integration Partner team presented an overview of the Performance Planning effort and helped the University Services team create its own FY’03 action items to link to FSAU’s Action Items and other key management documents. Now that team action items have been collected, the team will work with managers to facilitate meetings with individual employees to document their specific action items.

**Resource Planning**

The Resource Planning initiative supports the organization’s need to maximize and report the utilization of staff time. Once the team lead has presented an overview to managers, each manager will conduct discussions with individual employees to capture data regarding the time dedicated to the projects on which they work. These discussions may be combined with the Line of Sight discussions to simplify the process for managers and employees alike.

**LMS Support**

FSA University Services personnel have day-to-day responsibility for the day-to-day operations and system administration of the Learning Management System. Ad-hoc support continues to be provided to FSA University on an as needed basis. The Integration Partner (Accenture) continues to interface between FSA University and the vendors (Jamcracker and Saba) as needed to facilitate resolution of issues. During this period the period of performance for the LMS was extended and background information provided to assist FSA University in their decision to delay future investments in the LMS until there is more clarity regarding the long-term commitment to the current LMS solution.

**Observations/Recommendations**

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

- FSAU staff members are concerned about the organizational changes. The communications team has been effective in communicating messages and information to address these concerns. In addition to these efforts, Chuck and Sarah’s question and answer forum to regarding OneED benefited staff.
- To address staff concerns, it would be helpful to have a vehicle where FSAU members can anonymously ask tougher and more sensitive questions. For example, employees could submit questions anonymously before the monthly FSAU all-hands meeting, where Anne could provide “straight” answers for the entire staff.
- Given that the Performance Consultant team lead role is under transition to a new member, this is a good opportunity for the process to be refined, making it more efficient and concrete.

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**Attachments:**

- Strategic Planning and Organizational Design
  - Alignment of Human Capital Initiatives and Goals
  - Federal Agency Intern programs
- Training Process Team
  - Updated Gantt chart
  - Process checklist for coaches and leads
- 100 Series
  - Advisor Survey
- Performance Planning Line of Sight
  - Process Flows
  - Individual Action Items document