



# **FSA University Performance Consultant**

Overview

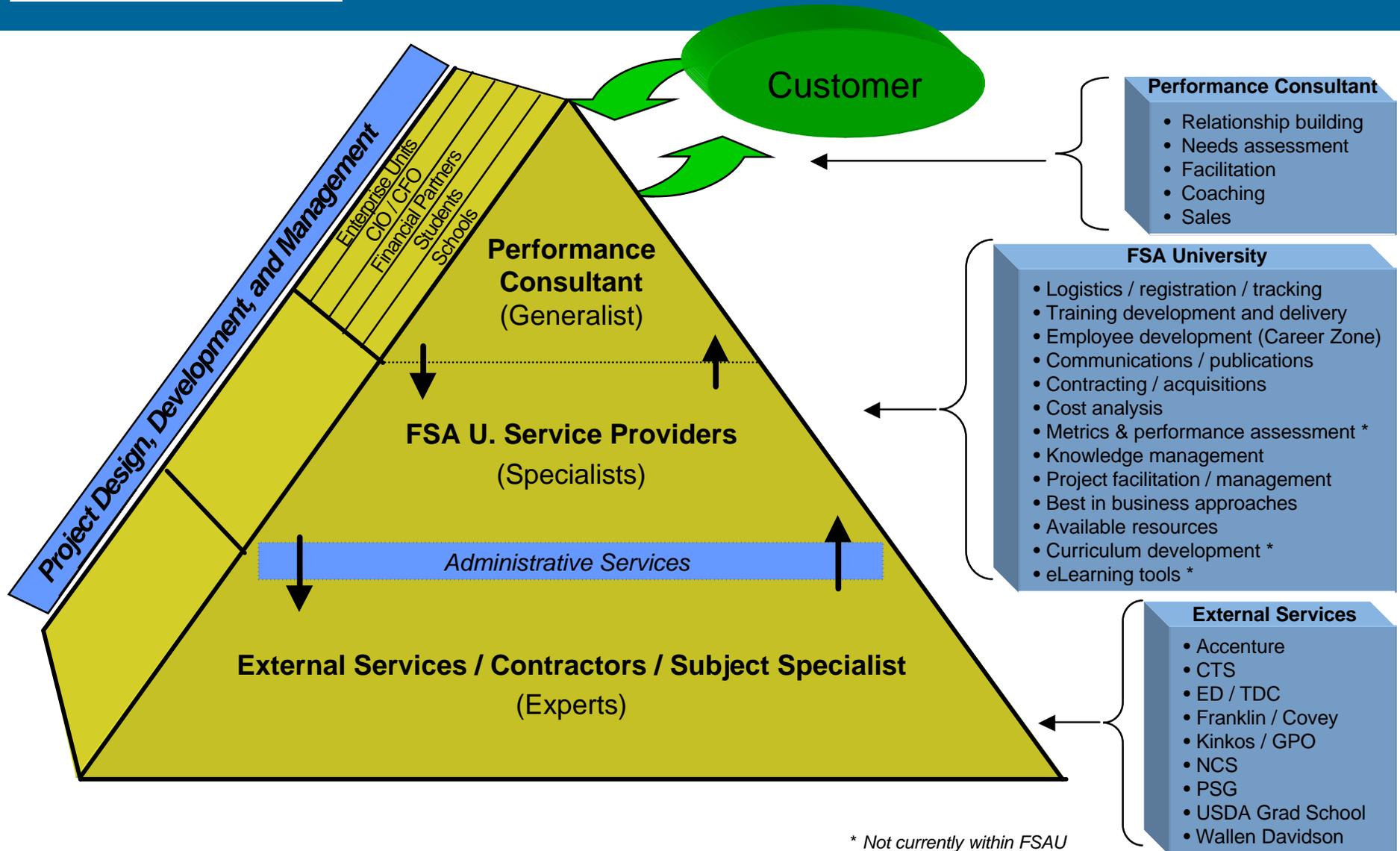
September 18, 2002



# Agenda

- ❑ **Performance Consultant overview**
  - Structure
  - Goals
  - Roles
- ❑ **Proposal development process**
  - Needs Assessment
  - Proposal Request Form
- ❑ **Review Board**
  - Structure
  - Process

# Performance Consultant Structure





# Performance Consulting Goals

## Goals:

- Assist FSA in improving job performance and effectiveness through training and non-training solutions.
- Position FSAU as a strategic partner in selecting and implementing performance solutions.



# Performance Consulting Roles

FSAU

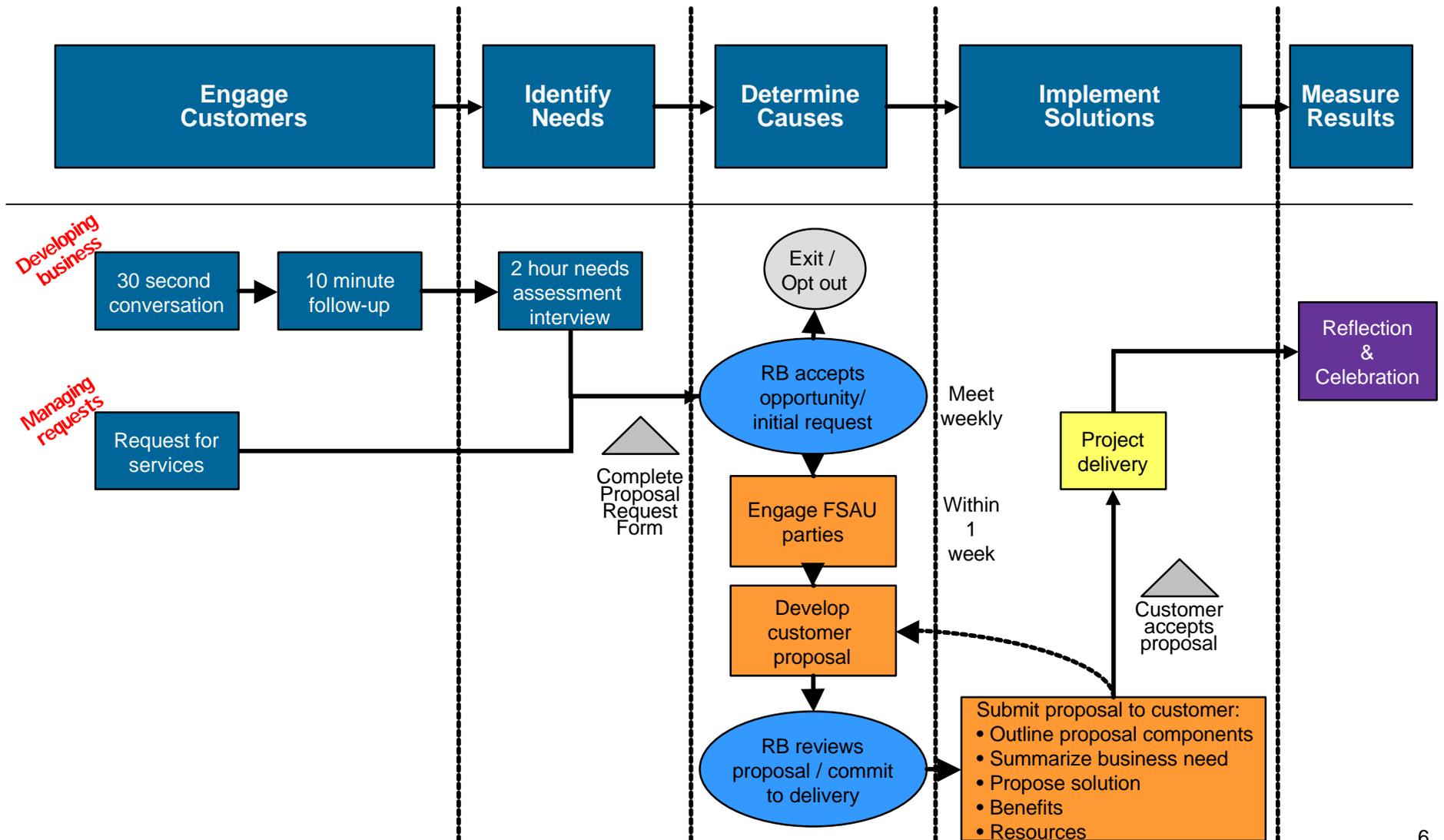
Channel / Unit	Lead	Performance Consultant	"Adjunct Faculty"
Schools	Midge	Dwayne / Pennie	Jo Ann Sarah Jeff (PSG)
Students	Bill	Bill	Mary Loafy (PSG)
Financial Partners		(Anne Eckman)	Lorraine (PSG)
CFO	Tim	Chuck	
CIO	Beth	Beth	Pam Wadsworth Mike Rockis
Analysis	Stephen / Sarah	Stephen	Midge Jeff Baker
Ombudsman	Stephen	Stephen	Anita Jeff (PSG)
Communications	Anne E.	Anne E.	Lisa Cain
Contracts	Art	Art	
Human Resources	Tony	Tony / Debbie	Linda Leary
Modernization			Howard (Accenture)
At Large	Anne Vicki Anita	Bill Dwayne Stephen	Skip

**All FSAU staff members serve as points of contact who share opportunities with performance consultants.**

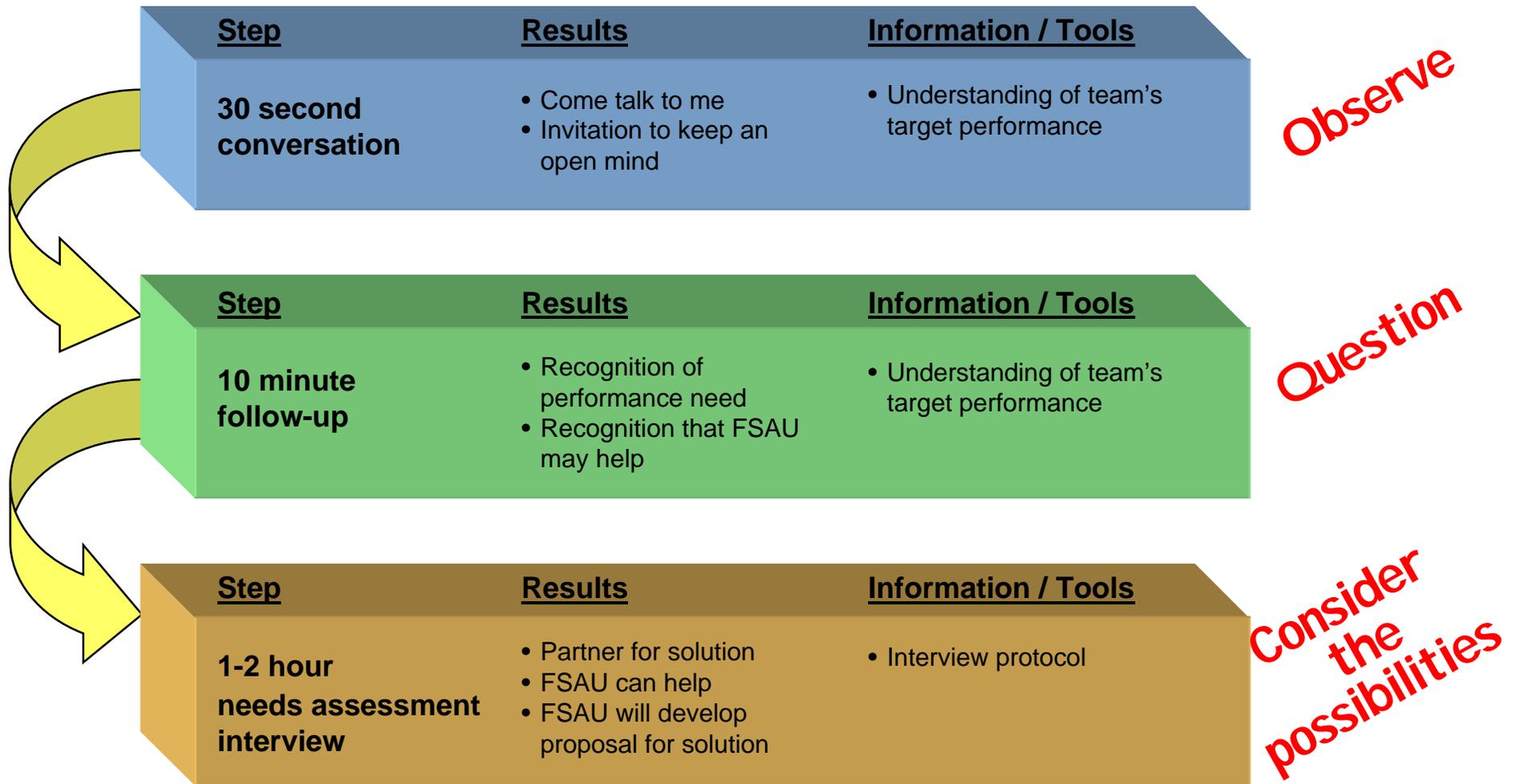
There are also some who perform specific roles:

- **Leads** serve as contacts to channels and units. Through existing relationships and knowledge of the unit, they identify areas for performance development or field requests for products/services.
- **Performance consultants** conduct needs assessments, determine approaches, and broker solutions for the customer.
- **"Adjunct Faculty"** denotes representatives from FSAU, channels, units, or operating partners who serve as resources for requests or performance needs.

# Consulting Cycle & Proposal Development Process



# Needs Assessment





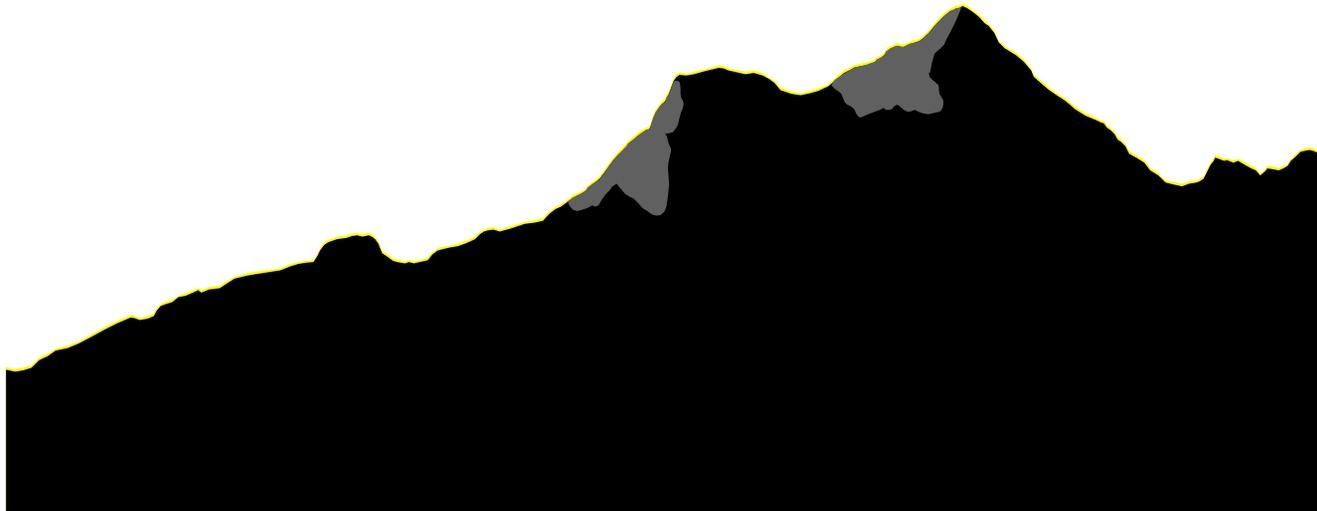
## Observe

- In which hand does the Statue of Liberty hold the torch?
- On a penny, does Lincoln face right or left?
- Are the stripes on a zebra horizontal or vertical?
- How many sides does a pencil have?
- Do shirt buttonholes point up and down or side to side?



## Question

Two men lay dead in a cabin on the side of a mountain.  
What happened?



# Consider the Possibilities

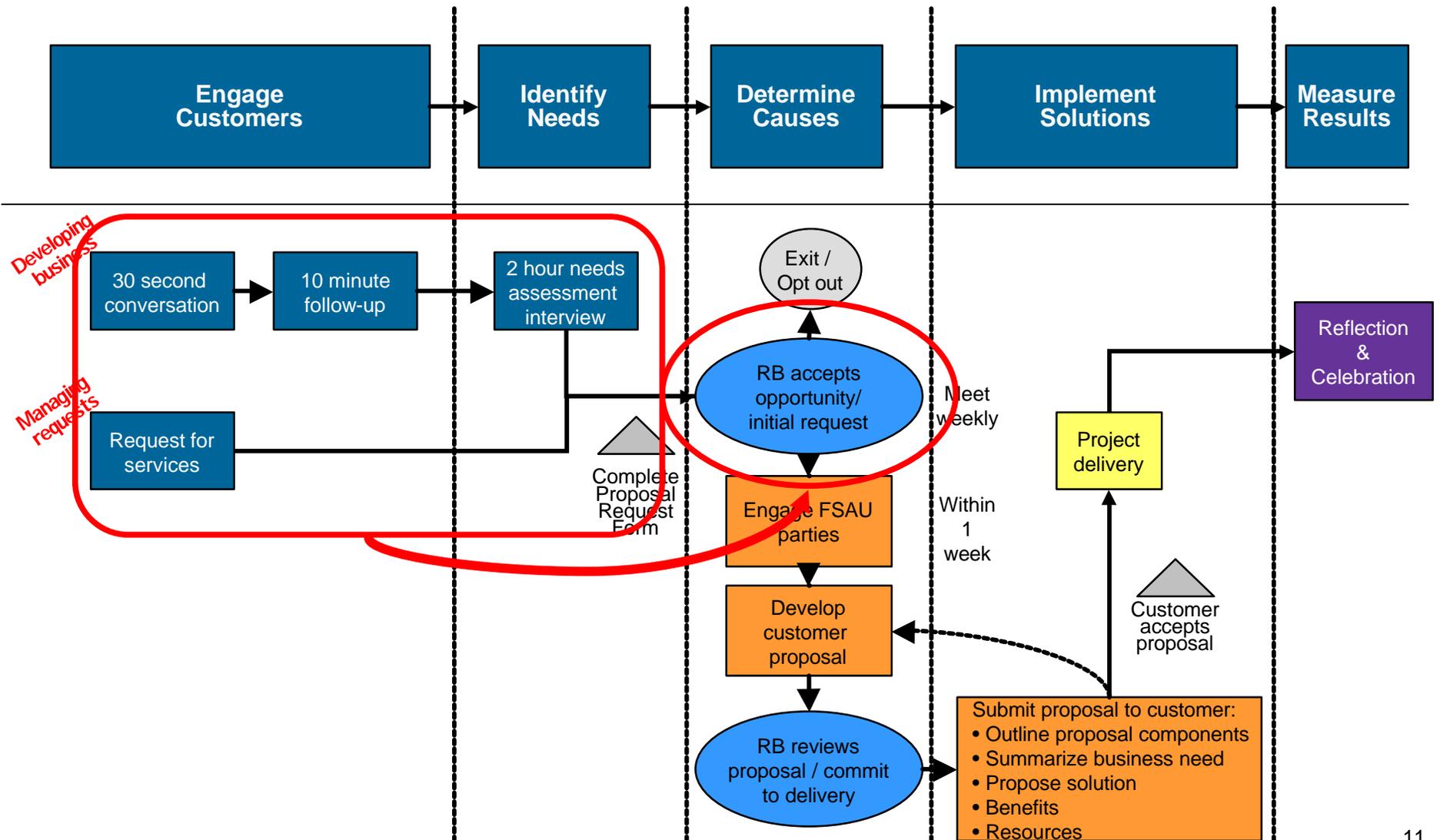
In your cellar, there are three light switches in the OFF position.

Each switch controls 1 of 3 lights bulbs on the floor above. You may move any of the switches, but you may only go upstairs to inspect the bulbs one time.

***How can you determine the switch for each bulb with one inspection?***



# Connection to Review Board





# Review Board

**Who:** FSAU team leads; Stephen (process owner), Bill (board chair), Anne (strategy), Tony (resources)

**When:** Scheduled as part of weekly managers meeting, based on demand

**Purpose:**

**I. Determine which projects we will manage**

- Review demand and requests for FSAU products/services
- Determine if request is in scope (or should be in potential scope)
- Determine if FSAU will pursue the opportunity

**II. Support proposal development**

- Determine who will prepare the proposal
  - What skills are needed? Who will be assigned?
- Timeframe / next steps
- Intelligence / advice
- Set appropriate expectations

**III. Support proposal delivery**

- Review proposal
- Review client needs
- Approve / agree to final proposal OR opt out / exit

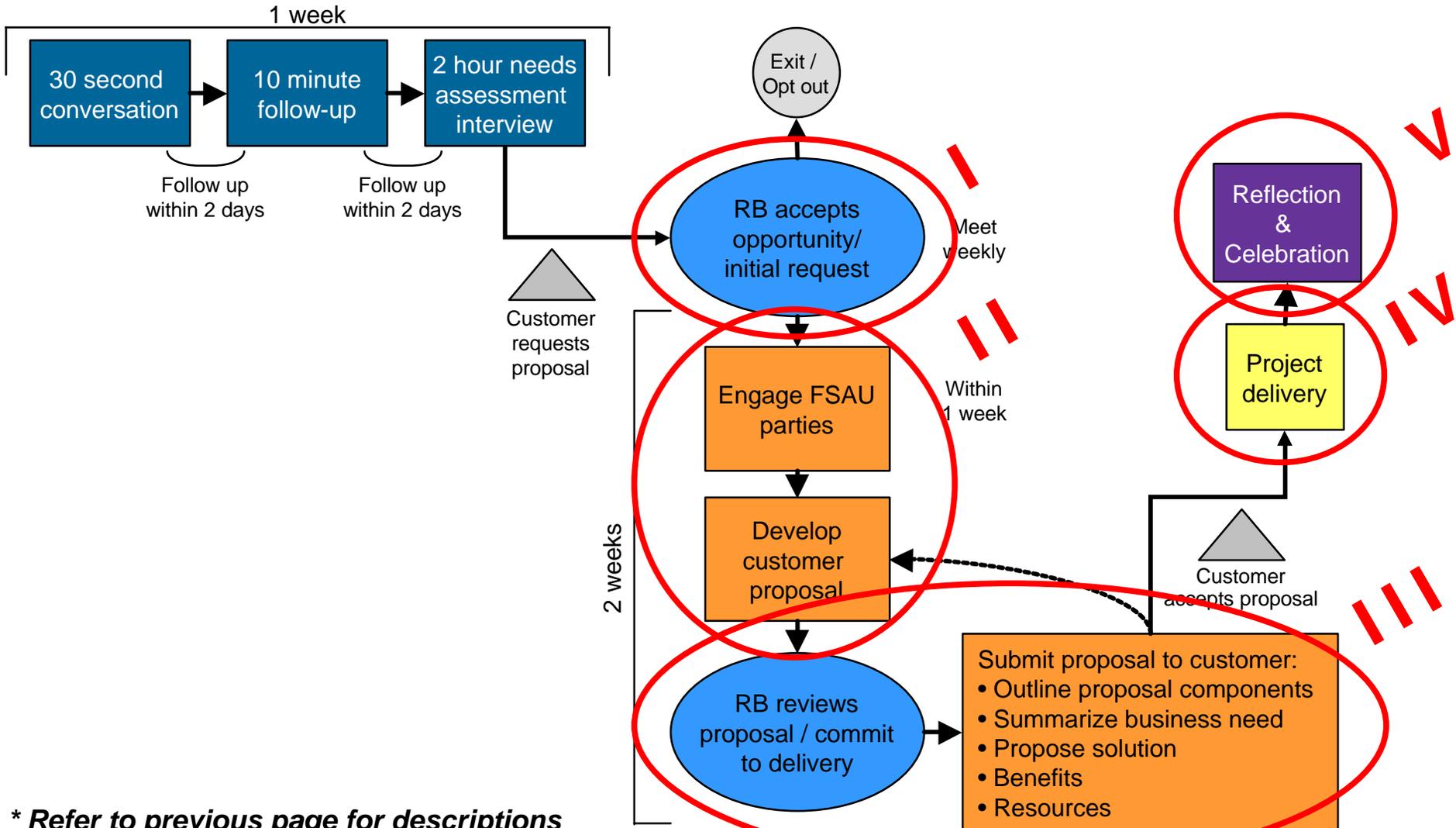
**IV. Project oversight**

- Review existing projects / opportunities
- Control project work, milestones, and scheduling
- Regular status reporting from delivery team
- Support delivery
- Acknowledge successes
- Assist teams with service recovery

**V. Reflection**

- Feedback from the customer
- Lessons learned
- Thoughts for future opportunities

# Proposal Development Process



\* Refer to previous page for descriptions

# Proposal to Project

