SFS Training Needs Analysis Report

Executive Summary

This report outlines the findings of a needs analysis for the Student Financial Services (SFS) training program, covering courses SFS1000, SFS1001, and SFS1002. The analysis identifies a critical performance gap: while these courses are required for gaining system authority, the current program lacks consistent assessment mechanisms and centralized support resources. This leads to uncertainty regarding learner competency and inefficient access to post-training support materials.

The core business need is to ensure all staff who complete SFS training are verifiably competent in their roles, confident in performing crucial system tasks, and aware of their responsibilities, particularly for high-impact systems like Flywire (SFS1002). This analysis recommends a three-pronged approach to enhance the SFS training program:

1. **Enhance Training Content:** Revise courses for clarity and improve the usability of support tools.
2. **Centralize Support Resources:** Create a single, accessible repository for all job aids and how-to guides.
3. **Implement Robust Assessment:** Add knowledge checks to all courses and develop a plan for longer-term evaluation to measure on-the-job performance.

Success will be measured by improved learner confidence, a reduction in support tickets related to SFS system functions, and the establishment of a data-driven baseline for continuous improvement.

Methodology

The findings in this report are based on a qualitative analysis conducted through a review of existing training program documentation and structured input from key project stakeholders within the Student Financial Services (SFS) group. The process was designed to understand the current state of training, identify gaps, and define desired enhancements from a business and operational perspective. Activities included:

- **Stakeholder Input Sessions:** Meetings were held with the SFS team to define the purpose of the training courses, articulate the expected learning outcomes, and identify desired

performance improvements. These sessions confirmed that the primary driver for the training is granting system authority and ensuring users understand the responsibilities that come with that access.

- **Support Material Review:** An analysis of existing support materials, including Flywire How-To Guides and Item Types Support Tools, was conducted. This review, combined with stakeholder feedback, identified challenges with clarity, discoverability, and potential user confusion.
- **Assessment Mechanism Review:** Current assessment practices were reviewed, revealing an inconsistency across the SFS training suite. While SFS1002 includes a quiz, SFS1000 and SFS1001 do not, representing a significant gap in verifying learner comprehension.

Project Background & Business Need

Stanford's Student Financial Services (SFS) group requires staff to complete specific training courses to gain authority to use critical financial systems. This training serves a dual purpose: providing general knowledge of system functions and formally granting access to these systems.

- **SFS 1000 - GFS Item Types:** Grants authority for GFS Item Types.
- **SFS 1001 - Course Fee Set Up:** Grants authority for Course Fees.
- **SFS 1002 - How to Use SFS Systems:** Grants authority for the Flywire system.

The root cause of the current challenge is a lack of consistent assessment and unified support. Without mandatory knowledge checks for all courses, there is no formal mechanism to ensure learners have grasped the critical information. This is particularly risky for systems like Flywire, where errors can have a direct financial impact on students. Furthermore, support materials are scattered and can be confusing, creating inefficiency for users post-training.

This results in:

- **Unverified Competency:** Risk that users are granted system access without demonstrating a fundamental understanding of the tool and their responsibilities.
- **Inefficient Support:** Users struggle to find clear, concise help when they encounter issues, leading to an increase in preventable help tickets.
- **Lack of Performance Data:** Without baseline assessments and long-term evaluation, it is impossible to measure the effectiveness of the training or identify areas for improvement.

The goal of this project is to address these gaps by enhancing the training content, centralizing resources, and implementing a consistent assessment strategy across the entire SFS training suite.

Target Audience Analysis

The primary audience for this training consists of Stanford staff members whose roles require them to work with student financial data and processes. These individuals participate in the SFS training courses specifically to gain the necessary system authority to perform their job duties. The audience is segmented by the specific authority they require, corresponding to one or more of the SFS courses.

Performance Gap Analysis

Current State

- **Inconsistent Assessment:** SFS1000 and SFS1001 lack any form of knowledge check; SFS1002 has a brief quiz, but there is an opportunity for revision.
- **Unclear Support:** Existing support materials for Flywire and Item Types are available but may be confusing or lack clarity, leading to user friction.
- **Decentralized Resources:** There is no single, easy-to-find location for all job aids and how-to guides, making post-training support difficult to access.
- **No Long-Term Evaluation:** No data is currently collected on learner performance or behavior change (Kirkpatrick Level 3 & 4) after completing any SFS course.
- **User Confidence is Assumed:** Learners are expected to be confident and competent post-training, but this is not measured or verified.

Desired State

- **Consistent Assessment:** All courses (SFS1000, 1001, and 1002) include a robust Level 2 knowledge check (5-10 questions) to verify comprehension before completion.
- **Centralized, Clear Support:** A comprehensive and easy-to-navigate repository of job aids and guides resides on the SFS site, providing a "one-stop-shop" for user support.
- **Data-Driven Improvement:** A baseline for Level 3 and Level 4 evaluations is established by tracking metrics like support ticket volume and resolution types for Flywire and course fee issues.
- **Verified Competency:** Learners must successfully pass an assessment to complete the course, ensuring they can demonstrate their ability to perform crucial tasks correctly.
- **Measurable Confidence:** The training program instills and verifies user confidence in their ability to use the systems properly and understand the responsibilities involved.

Task & Content Analysis (Must-Knows)

Based on the purpose of the training, learners must be equipped with the knowledge and skills to perform the following core tasks associated with each course.

Core Knowledge:

1. **Responsibilities:** Understand the importance and repercussions of actions taken within each system ("With great privilege comes great responsibility").
2. **System Purpose:** Differentiate the function of each system (e.g., Axess as the system of record vs. Flywire as the student-facing platform).
3. **Support Channels:** Know where to find centralized job aids and how-to guides for ongoing support.

Core Skills (How-Tos):

1. **SFS1002:**
    - Review a student's financial history in Axess.
    - Search for a student or authorized payer in Flywire.
    - Interpret the Flywire account summary.
    - Access and review account activity in Flywire.
    - Complete a payment process in Flywire.
2. **SFS1001:** Perform all necessary steps to correctly set up Course Fees.
3. **SFS1000:** Correctly use and manage GFS Item Types.

Constraints, Risks, and Open Questions

- **Risk - Unclear Support Materials:** The current support tools for Item Types and Flywire are identified as potentially confusing. Revision is needed to ensure they are effective performance support tools.
- **Constraint - Lack of Baseline Data:** No data is currently collected on learner performance post-training, making it difficult to measure the impact of any improvements (Level 3 & 4). This data needs to be collected to create a baseline.
- **Open Question - Scope of Long-Term Evaluation:** The SFS team expressed interest in Kirkpatrick Level 3 & 4 evaluations for SFS1002. Should this be expanded to include SFS1000 and SFS1001 as well?

Initial Recommendations

- **Enhance Training Content:** Revise all current courses to clarify content, focusing on improving the accessibility and usability of all related support tools.

- **Centralize Support Resources:** Create a comprehensive repository of job aids and guides on the SFS site to facilitate ongoing learning and support. This will serve as the single source of truth for users.
- **Implement Assessment Mechanisms:**
    - Create new Level 2 Knowledge Check assessments (5-10 questions each) for the SFS1000 and SFS1001 courses.
    - Revise the existing Level 2 Knowledge Check assessment for the SFS1002 course.
    - Develop a formal assessment plan to track skill acquisition (Level 2) and application on the job (Level 3 & 4) following course completion.
- **Establish Evaluation Metrics Now:** Before re-launching the revised courses, capture baseline data to measure impact.
    - **Baseline Data:** Gather data on support ticket submissions related to course fees and Flywire usage.
    - **Success Indicators:** A decrease in basic, "how-to" support tickets and qualitative feedback indicating higher user confidence.

Next Steps

1. **Schedule Follow-Up Meeting:** Hold a follow-up meeting with stakeholders to discuss these recommendations and define a concrete implementation strategy and timeline.
2. **Move to Design Phase:** Upon approval of this report, the next step will be to develop a detailed content outline and storyboard for the online course module.