Technical Outreach — If The Mountain Won't Come To Mohammed…

Karen McRitchie
Grinnell College
Information Technology Services
Grinnell, Iowa 50112
(641) 269-4531
mcritchi@grinnell.edu

ABSTRACT

Grinnell College is a small liberal arts college in the Midwest with a student population of approximately 1400. As technology pervaded classrooms and all faculty and staff members acquired their own computers, the Information Technology Services (ITS) division found ourselves wishing for a magical spell to impart users with knowledge and training. Accordingly, the department developed training classes. What a concept that was! For a while, there were many topics offered at varying times to accommodate differences in participants' schedules. Unfortunately, this just didn't work, and the magic was still missing To make matters worse, the ITS staff began especially wishing for a magic charm that would lead participants out of their offices and into the classrooms for computer-related training and application courses.

There are two main problems with offering training to faculty and staff members. The first, is for some reason they just don't attend. Faculty members especially appear to be above sitting in a technology training class with other people, even though the information they would obtain would assist them in their daily work. The second problem is training sessions tend to be too comprehensive. While it is nice to spend three hours learning Microsoft Outlook for example, sometimes all the new skills aren't retained long enough that they can be utilized. That being the case, it is frustrating to teach or participate in training sessions that lead to poor retention due to extended times (sometimes as long as weeks or months), between learning the skill or application and then implementing new skills in a productive manner.

In response, one academic support team decided to provide "Desktop Outreach" training for their constituents. The training sessions were designed as customized training lessons to be provided in the offices of trainees for 30-60 minutes. They were goal-focused, and at the end of the sessions, tangible skills or documents were produced. Topics ranged from "Creating a CD" to sessions like "Using Outlook with my Palm Pilot." The training sessions were held at convenient times for the faculty or staff members and they were interactive. The sessions turned out to be valuable. Taking the time to spend with faculty and staff was also a great customer service tool that helped to develop positive relationships with the faculty and staff members for the future.

Categories and Subject Descriptors

K.6.1 [**Management of Computing and Information Systems**]: Project and People Management – *staffing, training.*

General Terms

Management, Measurement, Documentation, Performance, Human Factors

Keywords

Training, documentation, outreach, customer service

1. INTRODUCTION

There are so many training possibilities in an academic institution, and it is difficult to fulfill all the needs. It is discouraging to teach or participate in training sessions that lead to poor retention due to long lag times between learning and implementation of skills. In addition, it is frustrating for ITS staff to attempt to hold training sessions at convenient times for everyone. It is even more exasperating when registered participants don't attend because "something came up"—and since the courses are internal, participants often think that they can just reschedule. Considering all of these factors, it is daunting to develop a successful training model!

2. THE MOUNTAIN

For the well-known metaphor, we considered the "mountains" at Grinnell College to be faculty and staff. These were—and are—the "customers" of ITS. They are the people who needed and usually desired an increase in their technological skills. Their needs must always be considered for the program to work. The training staff understood that effective instruction focuses on learners, and that people learn differently. By offering an individualized training strategy, the program would allow instructors to focus training on the most successful methods, and this model was favored to one that would provide generic training sessions via group learning on the internet or CBT.

Time is a critical factor in a successful training model. Varying schedules and work days of the "mountains" require "creative" scheduling so that each workshop draws optimal attendance.

Repeating sessions helps to address this; however, attendees still may cancel since another session may be just around the corner. Timing training with projects is beneficial for successful learning. One question to ask is, how helpful is it to work with "training data" for a workshop? It stands to reason that training is more successful when the session uses familiar data and is focused on a current project.

Another recognized goal could be fewer calls to the campus help desk, if the training is successful. Calling the help desk may not be a bad thing, but it is inefficient to keep assisting the same person with the same questions.

3. DESIGN

"Learning processes occur over time, in phases, during which the learner's bodies of knowledge evolve and change quantitatively and qualitatively." [1] Humans retain more when exposed to learning in phases, allowing them to practice their new skill or knowledge before advancing to the next. If a three hour training session on Microsoft Outlook is presented, one might question how much of the application training will be retained when the staff member returned to his/her office. It was decided that each session had to be designed individually, based on the needs of the "mountains."

3.1 Training Duration

Customized training allows for instruction at a pace comfortable for the staff member. The instructor can slow down or speed up based on one person's learning rather than the pace of a group. It was determined that each training session needed to be focused so that it was only 30-45 minutes in duration, to allow for a more successful retention. If the topic requested was too broad, a second or even third session needed to be planned.

3.2 Goal Focused

It is best to design the program with a specific goal. The training team decided, for example, if a faculty member wants help with creating a CD of class files, the training session should produce a CD with class files. Likewise, if a faculty member wants a table on a web page; the web page should have a table when the session is finished.

A tangible goal helps the person apply new knowledge or skills to a real-time task and conclude with a final product that he or she has successfully created as a reward for the time spent in training.

3.3 Familiarity

Familiarity also promotes successful training. The training team found that utilizing technology resources a person uses daily (such as their computer and network storage areas) promotes confidence. In addition, less time is spent on "mechanics" during the session. Also, people often spend a lot of time struggling to obtain training data from classroom resources or training CDs. If a person is already familiar with retrieving files from network storage, or how to logon to the network, more attention can be focused on the content of the session.

3.4 Customized Content

When a session is customized for an individual, training is more productive. The instructor's attention is focused on one person, so more time can be spent on needed tasks and less time on skills that are already mastered. Group sessions can either drag or seem too fast, depending on the skill levels of the members of the group. Customized sessions are paced with only one member of the audience.

4. Topic Development

This can be the creative part of a customized training. If a staff member or faculty needs to learn something, it is useful to create a training session including course outline and supporting documentation.

Some of the topics in our desktop outreach sessions have been: "Burning a CD? Do you need a match?"; "Grades on Blackboard"; "Right Click? What is that?" (Topic for Mac users who switched to a PC), "Palm Reading: Using Outlook with your PDA," and "Outlook Calendaring."

To date, most topics have required only 30 minute sessions, leaving ample time for questions after the presentation.

After creation of a few sessions, it is good to advertise the listing to staff and faculty, because often training needs are common. More often, once a session is designed, it can be reused as needed.

5. Training Preparation

5.1 Documentation

The profusion of desktop applications has allowed for easy creation of documentation. It is essential to document important points and any detailed instructions for further reference. On the other hand, writers must try to keep supplemental documentation succinct. One page, or one two-sided page, should be the limit.

5.2 Course Outline

It is vital to create a course outline for the presentation, noting tasks and self-tests that the trainee will perform. This step will take time to complete; however, once the session is designed, it can be offered without much preparation in the future.

5.3 Applications/Hardware

It is important to make sure that the faculty or staff member has the correct applications and licensing for the session. It is critical to order any software in advance, and bring several CDs or other supplies as necessary. Once, we experienced a situation whereby a training appointment was scheduled for burning a CD, but not until after the session began did someone realize that there was no CD-RW installed in the computer. Obviously, the instructor stands to be humiliated if some preparation is not completed.

6. EVALUATION

It is also important to get feedback from the faculty or staff member after each training session. It is good to send an email evaluation or leave a notecard for comments. Then, trainers can use these evaluations to "tweak" the session, the instruction, and the general program.

The trainer also needs to determine if the training appointment was successful and if subsequent training will be necessary. Did the trainee successfully learn a new skill or technology? What should be improved?

7. CUSTOMER SERVICE

This is probably the most important return on the investment. Not only does the trainee develop a new skill, but he or she also works closely with an ITS staff member. The informal setting allows general conversation about “how things are going.” The ITS staff member may find out that there are technology issues or needs that have not been successfully addressed. This strengthens the relationship of ITS and the rest of the campus.

Follow-up is also important. This can be done by creating a task in the calendar to send the trainee a brief email message that restates important points from the training session, answers any unaddressed questions, and inquires about how he or she is doing with this new skill. We have discovered that a handwritten note is also appreciated. This gives the participant a quick reminder of the training session and also shows that ITS provides thoughtful service.

8. CONCLUSION

Although Grinnell College is a small, private college, the customized training model can be applied on a larger scale. Often larger institutions are departmentalized, so training can be accomplished by departmental staff rather than campus-wide personnel.

Customized training embraces differences in learning styles, addresses scheduling issues, and provides better retention & skill development. Since the focus is on the needs of the trainee rather than the needs of a group, the instructor’s job is easier. Since sessions are held in familiar territory, trainees are comfortable and less frustrated, but even more important: they show up and stay focused!

Everything considered, customized training is successful for faculty and staff members, simple for ITS instructors and always adds a customer service twist to the session.

9. ACKNOWLEDGEMENTS

[1] Shuell, T.J. (1990) Phases of meaningful learning, *Review of Educational Research,* 60, p.531-537.