BUILDING A SUCCESSFUL TRAINING PARTNERSHIP

by

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Abstract

As the training needs of the Food and Nutrition Services (FANS) staff outstripped their own resources, it was a logical next step to turn to the Information Technology Division’s Education Services group. This paper describes the successful monthly training partnership that has been in place since fall, 1994 and documents the benefits the program has brought to both the FANS group and Education Services. It describes the “breakdowns” and “breakthroughs” that were experienced and highlights the need for flexibility, management support, advance planning, and timely communication.
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PROJECT DESCRIPTION

Training Partnership Introduction

The partnership discussed in this paper is a continuing training partnership started in the fall of 1994 by the Food and Nutrition Services (FANS) department of the University of Michigan Medical Center and the Education Services department of the University of Michigan's Information Technology Division. FANS is comprised of approximately 300 employees (225 FTE) including registered dietitians (11%), dietitian assistants (3%), administrators, managers, and clericals (3%), food production (21%) cafeteria (25%), patient food services (33%), and motor meals (1%). FANS staff are responsible for planning, preparing, and serving all food services in patient rooms, the cafeteria, and distributed serving carts throughout the hospital.

The Education Services area of ITD provides training to the University of Michigan campus in regularly-scheduled workshops or as special-request workshops for departments, student groups, and academic classes. Classes are offered on a wide variety of topics including productivity tools, e-mail, computer conferencing, university administrative data, browsing and creating home pages on the world wide web, statistical computing, and instructional uses of technology. Special request workshops may include regularly-scheduled class topics or may be designed for a particular audience. Approximately 2,100 regularly-scheduled hours of instruction and 600 hours of special request training are offered each year.

Background

FANS initial vision for training was to provide continuous training for the automated information systems in the department that will allow employees to:

1) feel comfortable and knowledgeable in the use of the departmental automated systems

2) allow for the highest possible efficiency from staff’s valuable labor

The idea of a training partnership grew out of two problems with the regularly-scheduled ITD classes that FANS wanted to address:

• Training classes for information systems were not routinely offered within the hospitals. The nearest training classes offered by ITD were a 20 minute walk or bus ride away.

• The ITD classes were generic in nature and not tailored to the specific needs of the FANS department or to the specific needs of an individual's job routine or skill level.
Project Planning

Initial planning was initiated by the FANS information Technology Manager, Larry Hackenberg, and the ITD Education Manager, Elaine Cousins. A draft proposal was then presented to the FANS director and modified based on her input. A group of approximately 20 employees representing various facets of the FANS operation then modified the proposal further. A budget for the final proposal was prepared and presented to the ten-person FANS management team where it was modified and presented again about a month later. Funding was committed to conduct a one-year pilot, obtain continuous feedback from each user in each class, and to analyze the results of the pilot. The initial budget was for $11,000 to fund one full day of training per month, 40 hours of extra development, and printed materials for each student.

Three goals for the training program were identified:

1) To create a training program that will have one day of training per month, 3 classes per day, and conducted by professional educators and in the hospital training labs

2) To provide training in basic topics, training in the use of special features in software and hardware and the opportunity for individual training.

3) To provide approximately one half of the training classes on topics requested by employees and one half of the classes on basics topics or features of new software, software upgrades, and new hardware.

Program Scope

Classes. Three kinds of classes were identified:

1) Basic Classes -- standardized training for all appropriate employees
   • groups of 8-15 people
   • basic introduction to the department's automated systems

2) Features Classes -- training for targeted employees
   • groups of 8-15 people
   • training on specific features about hardware and software
   • specific topics determined by circumstance and users

3) Specialized Classes -- training requested by individuals
   • individuals or small groups of fewer than 5 people
   • advanced software features or consultation for specific projects
   • primarily user driven

Basic Classes were 2.5 hours in length and were designed to provide staff with a familiarity with the capabilities of the FANS computers. Topics covered were:
   • General computer information for staff with little computer background
     - computer files
     - storage and backup conventions
     - hardware basics and computer terminology
     - Windows navigation
• Network overview and logon procedures for accessing the Banyan Vines Local Area Network, the hospital mainframe, and the internet
• Introduction to the mainframe hospital E-Mail program
• Introduction to Microsoft Word
• Introduction to Microsoft Excel

The goal of the basic class was not to make people proficient in all of the programs above, but rather to provide an overview of their capabilities and an introductory "hands-on" look at these programs. Students followed up with further instruction in specific areas.

The Features Classes were also 2.5 hours in length, but each class was devoted exclusively to a particular program or piece of equipment. Topics included
• More in-depth training on the productivity packages above
• Microsoft Access
• Meeting Maker
• Microsoft PowerPoint
• LCD plate and tv projection equipment
• Use of the FANS color and large format printer and photocopier
• Use of the FANS multi-media equipment (scanner, and image processor)

Topics were chosen based upon
• Specific requests from individuals (managers and staff)
• Requests from the FANS Menu Committee
• Common requests for assistance
• Needs perceived by ITD instructors

The Specialized Classes varied from 1-3 hours in length and the course content was nearly always determined by the needs of specific individuals.

Circumstances and topics for one-on-one Specialized Classes included:
• Busy management staff learning productivity tools
• Unusual project consultation (large manuscripts, special cafeteria promotions)
• Systat
• Preparation of staff working on important public presentations

Small group Specialized Classes were conducted for:
• Editors of specific publications
• Timekeepers for Perfect Attendance information (a UM Hospital program)
• LifeSteps (a program for dietitians)
• Staff giving public lectures, making slides, and

Training Staff. Program trainers were primarily staff from the ITD Education Services. Once, when expertise was needed beyond the ITD Education Services group, an outside training provider was brought in. Education Services provided one “account manager” for FANS to work with. The account manager either conducted the training for FANS or identified other staff within Education Services to do the requested training.

Program Delivery and Assessment

Monthly Program. In the beginning, training was conducted one full day per month. Each day was divided into three 2.5 hour time blocks -- with each time block devoted to a
Basic, a *Features*, or a *Specialized Class*. In the first year of the program, the training day consisted primarily of repeated offerings of the Basic Class with some Features Classes and an occasional Specialized Class. In subsequent years, more time was devoted to Features and Specialized Classes. Training was more likely to be split among several different days in the same month rather than being held all on the same day. While the specific topics for training were identified closer to the date of actual training, specific training dates were set long in advance to allow for long-term planning in both the FANS and Education Services organizations.

**Fees.** FANS pays a yearly fee to ITD Education Services for the delivery of training. A basic price was determined for the 12 (or more) days of training to be provided and an additional sum of money is set aside to fund the anticipated development time for specialized training. The funds for development were drawn upon as needed. The daily rate was based upon the Education Services hourly rate for training, for development, and for one-on-one training/consulting. An average fee for all these services was calculated so that a flat, yearly fee for FANS could be calculated. Costs for the first 3 years of the partnership were budgeted as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Total</th>
<th>Days of Training</th>
<th>Rates</th>
<th>Basic/Features Training</th>
<th>Specialized Development and Materials</th>
</tr>
</thead>
<tbody>
<tr>
<td>1994-95</td>
<td>$10,650</td>
<td>13</td>
<td>$650/day</td>
<td>$8,450</td>
<td>$1,700 (38 hours 40/hour)</td>
</tr>
<tr>
<td>1995-96</td>
<td>$12,000</td>
<td>15</td>
<td>$750/day</td>
<td>$11,250</td>
<td>$1,160 (29 hours 45/hour)</td>
</tr>
<tr>
<td>1996-97</td>
<td>$14,250</td>
<td>15</td>
<td>$850/day</td>
<td>$12,750</td>
<td>$1,500 (30 hours 50/hour)</td>
</tr>
</tbody>
</table>

**Evaluations.** Program evaluations were done in a variety of ways. Written evaluations and verbal critiques were conducted after each class. The written evaluations asked participants to rate the perceived value and quality of the content and delivery of the session. In the verbal critiques, we followed a meeting critique format that has become standard at the University of Michigan. We asked participants to list, one by one, something that worked particularly well for them in the training and/or something that they would like to see changed in a subsequent session. In the third year of the program, post-workshop e-mail evaluations are being conducted to document the extent to which participants can see improvements in their work as a result of the training they receive.

**BENEFITS TO FANS**

Quite a few benefits to FANS have been attributed to the training program. Some of these were anticipated at the outset and others turned out to be a pleasant surprise. The four major benefits are:

1) **Structure and schedule for training.** The training program has provided a ready structure for the introduction of training for new systems that are introduced either at the department level or on a hospital-wide scale. Where other departments worried about training their staff on new technologies being introduced, the FANS group knew that training would happen routinely as part of their already-established training program. For FANS staff, there is a degree of comfort associated with the knowledge that training is never more than a month away.
2. **Improved job performance.** FANS staff are able to do their jobs more easily and with less frustration than before the training program began. Less time is spent complaining about automated equipment because people can use the equipment with less difficulty and realize the benefit it will provide them.

3. **Improved morale.** FANS staff perceive increased job security as their skills grow as a result of training and they have more opportunity to advance -- either in their present job or to other jobs. The ongoing training and constantly improving job skills makes downsizing less frightening and has improved employee morale in a difficult transition time.

4. **Information Technology Staff benefit.** Calls for computing assistance have been reduced because training is focussed on areas determined by the FANS Information Technology staff to be of greatest need. Thus, the IT staff can take on other areas of development.

5. **“No-fail” training.** Because the classes are small and because training can be tailored for specific individuals (including one-on-one training when necessary), no one "falls through the cracks." The trainers can do whatever it takes to insure that the staff who need specific training actually receive it. While the budget for training is set in advance, the FANS group can specify what the balance of small group and large group training needs to be.

6. **Staff Anxiety.** As a result of the ongoing relationship that has been developed between FANS and Education Services trainers, staff anxiety about learning new technologies has been significantly lowered. Staff know the trainers they’ll be working with and are confident that they will get the training they need when a new technology is adopted.

**BENEFITS TO ITD**

ITD has benefitted from the partnership in a variety of ways -- all as a result of the long-term relationship with a customer group and continuous involvement with their staff. The partnership has offered ITD staff a window into how technology is used to accomplish a specific department's goals and has yielded benefits for campus-wide training programs. ITD can use the first-hand experience it gathers in the FANS organization to improve the quality and relevancy of the regularly-scheduled classes for the campus at large.

Some of the major benefits of the partnership to ITD have been a result of the following opportunities:

1. **Observe common problems.** Working closely with a large group of staff over an extended period of time has provided the opportunity to experience, first-hand, the problems that people encounter. From one month to the next, trainers can see where training has been effective and where it needs to be modified to be more effective. Working with the same staff over an extended period of time also allows trainers to build a foundation and assess when it’s time to move to a new level or if foundation concepts need to be reinforced.

2. **Learn from FANS.** While all trainers learn from their students, working with FANS has been exceptionally rich in learning opportunities. The FANS group has a very sophisticated technological environment with specialized equipment on which staff
needed to be trained. This has provided ITD with experience using equipment with which staff had not previously been acquainted. This experience will carry over to the support of other users on campus. In addition to the technology, ITD staff were also introduced to the benefits of doing oral critiques at the end of classes. While ITD has always done written evaluations, they were requested by FANS to ask participants at the end of each class "What worked well in training?" and "What might have been done differently?" These oral critiques have been very useful in improving the quality of training -- for FANS and for the campus at large as the technique is adopted by instructors in ITD’s regularly-scheduled campus training program.

3. **See a "real-world office context."** This has been one of the most significant benefits of the partnership. Seeing first-hand the problems that people encounter as they do their work has provided an invaluable perspective on how technology is successfully incorporated into the day-to-day work of a department. Seeing the way an office is configured, how a department's network is configured, and how a particular software program is being used to do real work all provide critical insight into learning needs. This insight results in the design of more effective, user-focused training.

4. **Gain more in-depth knowledge of hospital computing environment.** Due to its size, the medical campus staff are one of the highest user groups in ITD’s regularly-scheduled classes. The first-hand look at the hospital computing environment allows ITD to better serve the medical campus staff in all classes.

5. **Observe staff development over a period of time.** Last but not least, the ongoing partnership between ITD and FANS has allowed trainers to see the development of skills in staff over a long period of time. Unlike the regularly-scheduled classes where you may see someone for several classes in a relatively short period of time, the partnership affords a glimpse of how skill development takes place over a period of several years. There has been enormous satisfaction in seeing staff grow in their skills and fluency and develop from the novice stage to competent and confident users.
BREAKDOWNS AND BREAKTHROUGHS

1. **Variety of Formats.** A major breakthrough was the adoption of a variety of formats for training. Traditional classroom training was found to be the most efficient and effective way to introduce large groups of staff at the same level to commonly-used applications. The introductory training, e-mail, and common productivity software was most often delivered in the classroom. As skills and needs differentiated, however, small-group and one-on-one training was best. It was also best when busy or inflexible schedules prevented staff from attending classes. Small group training is offered right in the individual offices and serves as consulting on real-work issues.

2. **Communication.** Since we wanted training to be focussed on what people needed, it was critical that good communication channels allow the needs to be accurately represented and communicated in a timely way to the FANS and to the ITD training staff. Problems occurred when FANS was not specific about their needs. We learned that it was not always easy for staff to articulate their needs even when they were clear. Strategies were devised to help identify needs. It was sometimes more fruitful to let ITD identify the training needs from the results of general questions such as “What do you have trouble doing?” or “What would you like to do?” than to ask specific questions about what people need to learn.

3. **Management Support.** It’s not enough to provide people with training if the training isn’t supported or integrated into the work life of an employee. Managers need to convey their expectations for training and, where necessary, relief staff need to take over while other staff are in training. Once trained, staff need to be assigned responsibilities that will enable them to apply what they’ve learned back on the job.

4. **Flexibility.** There are many attributes that make a trainer successful, but flexibility was key in our partnership. It was essential that trainers understood the need to adapt regular course materials to the needs of the audience and responsive to the participants during training. This included modifying the content to fit the FANS training schedule as well as the way in which any particular technology was being used at FANS. Instructors found it useful to bring a wide variety of course handouts to each training session in anticipation of a wide variety of participant questions. Also, working in a departmental office demanded that the instructor have the ability to solve or report computer problems that they might not have previously encountered in an ITD classroom.
5. **Registration.** We discovered that we get our best responses when the class announcements are approximately 1-2 weeks prior to the occurrence of the class. Registration too far in advance of the class tended to produce a larger number of no-shows. Registration needs to be by e-mail and it needs to be very easy for participants.

6. **Designing a Schedule.** Basic classes, we learned, needed to be repeated about every 6 months to train new workers and to catch people who were unable to attend previously scheduled classes. It was also important to vary the day(s) of training each month to insure that training didn’t conflict with standing meetings and other staff time constraints as well as to maximize the potential for all staff to be able to attend training during the year. With downsizing, we expect Basic Classes to be in reduced demand.

7. **Training Room Management.** The amount of time it takes to keep a training room running smoothly can’t be underestimated. It was not always possible to have the same screen and the same look and feel on the computers in the training rooms that the users will experience at their workstations. Some programs couldn't be run in the training room because of incompatibilities with other already-installed software in the hospital’s training room computers. This is a growing problem as the training room requirements become more complex.

**CLOSING: THIRD-YEAR INNOVATIONS AND THE FUTURE**

In the third year of the partnership, we have instituted several innovations.

**More small group workshops.** There are more small-group workshops this year to accommodate the growing differentiation of skills and specialized needs.

**Better integration of training in the workplace.** We are looking for training to be better integrated into the workplan of each staff member. Minimum standards for all staff will be adopted and managers will play a key role in determining the training goals for each of their employees. They will also follow up to ensure that staff have opportunities to apply their newly-developed skills in their work assignments and responsibilities.

**Learning styles of work groups.** With time, we have all become more aware of the different learning styles of different work groups. We've learned that learning styles differ not only by individual, but also by work group. We've learned that training needs to reflect the departmental culture in which it takes place and we're modifying our training to adapt to each work group's style.

**The future.** Although significant reductions in staff are taking place in the hospital, the need for ongoing training is recognized. The benefits to morale and increased staff effectiveness are important to maintaining the quality of service in Food and Nutrition Service. The program is expected to continue although at a reduced financial level during the next budget year. Replacement staff and staff with specialized needs will be the target audience for training in 97-98.