College of Southern Maryland

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1.0 **Background:** In 1999, the College of Southern Maryland fully implemented Colleague as the integrated data system for the college. At that time the following conditions existed:
- End user technical skills set requirements were unknown
- Lack of an organized technical training program, including a lack of a college wide technical system orientation or overview
- No standards for across the board technical training plans or continuous on-going in-house training had been developed
- Experience was only one person deep and an uneven playing field existed in many areas
- A lack of understanding of Colleague files, data and processes
- A lack of understanding of the impact of integrated business process, rules and standards
- Limited use of desktop applications to enhance operations
- Limited use of technology tools to solve problems, improve processes, improve efficiency and to measure vital signs
- No organized, structured approach to communicating required changes to validation / shared files and codes, system setup parameters, business rules, etc.

Therefore, a training plan was developed incorporating the following components:

**Scope:** The technical training program will focus on Colleague and the related family of products. A complete overview of the College of Southern Maryland information systems operational environment was documented in the Information Systems Management Strategic Plan.

**Manpower Requirements:** In May 2000, the Information Systems Management (ISM) director made a presentation to the President’s Council describing the need for a coordinated technical training program. The technical training program coordinator position was created in August 2000 and the position was filled in September. The ISM programming team, documentation manager and the task coordinator positions were also rewritten to incorporate duties supporting the technical training program.

**Courses:** The first technical training courses were offered in January 2001. Standards for each course were developed including syllabi, course materials and certificates of completion.

In 2004, all CSM information and technology service related departments were realigned and consolidated under one Information Management Team (IMT), led by an executive director. The technical training program
The coordinator position was reassigned and became a direct report to the executive director.

In 2005, the technical training program was expanded to include not only Colleague associated courses, but training related to technical processes, software applications or related topics in use or in the interest of college staff and faculty. Technical training being offered by various CSM subject matter experts would also be eventually consolidated and coordinated under the program as well.

In 2014, the Information Management underwent an internal reorganization, at which time a Project Management & Technical Training functional area was introduced.

Department supervisors and process owners will continue to be responsible for process and operational training specific to their functional area. Individual training as well as on-the-job training should continue to be a departmental priority in order to prepare employees to handle all aspects of their job responsibilities and duties within their functional area. Assistance and guidance will be provided by the technical training coordinator in developing these types of specific training, should the decision be made to offer the training as regularly scheduled classes under the technical training program.

2.0 Objectives: The objectives of the technical training program are to develop and manage a college wide program that will enhance operations. Outcomes of the program should include:

- Improved processes, efficiency and services
- Decreased manual, labor intensive and duplicate processes
- Significant improvement for information access, retrieval, and presentation
- Increased user and executive confidence in accessibility and reliability of data
- Improved knowledge of technology services, software applications and processes

The mission of the program is as follows:

The technical training program supports staff and faculty by development and coordination of training opportunities relating to software applications used to perform college business functions. Training partnerships are sought to provide additional varieties of development possibilities to all employees. We strive to provide timely, accurate, informative, accessible and user-friendly training which prepares employees with the required
skills to complete tasks and projects in support of our students, community, and college goals and objectives.

3.0 Assumptions: Several assumptions were made during the development of this training plan:

- Training participants have a basic working knowledge of computer usage and essentials
- Colleague will continue to serve as the integrated data system for the college and additional functions/features of related software will continue to be incorporated
- Microsoft Office Suite and associated products will continue to serve as the college preferred desktop applications
- Additional training classes will be required as the college expands Colleague features and continues to incorporate various software applications as tools for developing solutions to accomplish college tasks and objectives
- Positions will continue to be advertised and filled as either new positions are created or vacated positions are refilled
- Courses under this program will be offered to all staff and faculty

4.0 Needs Assessment: The purpose of the needs assessment or needs analysis is to determine the level of technical training required. Assessments through the Human Resources Department (HRD), Division of Distance Learning and Faculty Development (DLF), process owners, supervisors and Information Management Team (IMT) members will contribute to the determination of training requirements.

HRD is responsible for maintaining a training matrix for each position description which can include training from multiple sources, such as:

- Human Resource offerings
- Diversity Office training
- Distance Learning and Faculty Development workshops
- Technical Training
- CSM office technology (OFT credit, OFC continuing education) self-paced classes (i.e. Microsoft Office applications)
- CSM courses (credit and/or continuing education) relating to the specific skills required to fulfill the duties of a position
- Vendor training (on-site, off-site, web, demos)
- Departmental specific training (initial and on-going)
- On-the-job orientations / training

The technical training program coordinator will maintain the Colleague Training Guide which will be referenced from the HRD training matrix. Given the Colleague required training for each position / person depends
on the access granted, this guide will provide a way to determine, on an individual basis, the required training in association with the access a position / person has been granted at any point in time.

5.0 Requirement Identification: Through the process of job analysis, the complexity of a position’s responsibilities can be broken into logical parts such as duties and tasks, departmental, incumbent, group and cross-functional requirements. This process is done through collaboration with the following:

5.1 Process Owners: Process owners are defined as those individuals who have been assigned functional responsibility for a module or process. They develop and refine related processes and business rules as well as coordinate system enhancements. They are considered subject matter experts and input will be collected from these process owners regarding the areas in which they identify a need for training.

5.2 Technology Services: Technology services staff members will provide input as to training needs based on upcoming software enhancements, releases, installations or purchases of partner software to work in conjunction with current college software.

5.3 Technical Training Program Coordinator: The technical training program coordinator will review information received from several sources (i.e. process owners, technology services, supervisors, vendor sources, etc.) and provide guidance/assistance to the process owner or subject matter expert in development of training material based on upcoming technology changes, upgrades, new implementations and the like.

5.4 Human Resources: The requirement identification effort will be coordinated with the Human Resources Department to ensure that the potential needs for the entire college are considered.

5.5 Supervisor(s): Managers and supervisors of direct report positions should be knowledgeable of the requirements for each position and, therefore, able to provide extensive input as to staff development and training needs.
6.0 **Training Model:** The following graphic displays the training model.

- **Level I** - overview/orientation of many topics relating to technology as well as general orientations
- **Level II** - basic training builds on the orientation / overview knowledge; includes introductory training related to software applications as well as specific department information beneficial to the general college community
- **Level III** - process and software specific training
- **Level IV** - extracting data, reporting and presentation solutions
7.0 **Training Course Development:** The following flowchart outlines the process of developing new training classes.

- **Process owner / subject matter expert** recognizes a need
- **IMT / IT** recognizes a need
- **New products, features, functions or processes introduced**

Discuss with appropriate parties to determine training feasibility, target audience, range of information to include, etc.

- Develop training material
  (Process owner, subject matter expert, technology services staff, IMT staff, etc.)

- Pilot training to select group
  (multiple sections if necessary)

- Evaluate and redesign / adjust training material if warranted based on results and feedback from pilot section

- **Another pilot?**
  
  - Yes
  - No

  Create course description (if applicable) and post to the training site; schedule sections and add to registration selections; advertise

  **Begin offering class on an appropriate schedule**

  **Materials should be reviewed periodically by the author and updated based on evaluation feedback, change in process or functionality, technology advances, etc.**
8.0 Training Genres: There are several avenues to pursue technical training at CSM. Supervisors and employees should utilize all types of opportunities, especially where course offerings are already in place and costs are minimal (like CSM con ed and credit courses). Utilizing a variety of sources will provide a very broad base of knowledge. Individual departments should budget accordingly for training with associated costs.

8.1 Courses Developed Internally: This include all courses developed by CSM process owners, subject matter experts, technology services staff or Information Management Team (IMT) staff. These courses include but are not limited to such topics as GroupWise, network, an assortment of overviews, Colleague related processes/issues, information security or department/project/process specific.

Generally, these courses are developed as learner centered instruction with demonstration and/or hand-on experience being a very important component. Many courses also include an abundance of informational material to assist employees in completing college work.

Internal courses can be delivered in a lecture/lab format or in an online format via the current Learn Management System. Final assessment score may determine course completion.

8.2 Ellucian Inc. Training Courses: In addition to the Colleague related training courses developed by CSM, Colleague courses are also available from Ellucian, Inc, (the vendor that produces the Colleague software). There is a cost associated with attendance at these courses, plus travel and/or accommodations in some cases. Each department must budget accordingly.

Ellucian offers face-to-face courses in a fully-equipped training center located in their training facilities. These classes are conducted in a ‘hands-on’ environment in order to allow the participants to utilize the functionality being taught as a part of the coursework. These courses can also be taught on-site (vendor restrictions may apply). Alternative training formats are also utilized by Ellucian such as web demos for products and features. Some courses are also offered via web conferencing and distance learning formats.
In addition to Colleague specific-training, Ellucian also offers training in cooperation with partnering software vendors and on broader topics such as institutional effectiveness. Information regarding Ellucian training can be found on their web site (www.ellucian.com).

8.3 CSM Office Technology Courses:
CSM office technology courses are also an option for MS Office application training. These courses are delivered in a self-paced format. Employees should review the current schedule of classes for a listing of available courses.

The Human Resources Department (HRD) provides a waiver of course fees for these courses for regularly benefited employees who are either full-time or part-time and eligible for benefits (i.e. this means permanent full-time faculty and staff and permanent part-time employees). The employee must also obtain the approval of their supervisor for this training. Below are the steps necessary to receive a waiver of course fees for these Office Technology MS Office Suite courses only:

1. Visit the Human Resource Office for a Fees Paid for Microsoft Office Suite Courses form (copy attached to email)
2. Secure Human Resource signature and authorization
3. Obtain approval from supervisor through signature on Fees Paid form
4. Register (in person only) at the Express Counter with registration form and completed Fees Paid form

Please note that HRD does not pay for books, however, the employee's department can pay for the course books out of their budget. Questions regarding the waiver of fees for these courses, eligibility, or the steps outlined above, should be directed to the HRD organizational development specialist.

8.4 Microsoft Online Tutorials: The Microsoft Corporation web site (www.microsoft.com) offers free tutorials and demos for many of their software applications such as Word, Excel, PowerPoint, Access, etc. Microsoft will also provide on-line demos to discuss new features and functionality when upgrades are released.

The tutorials are self paced, usually require between twenty minutes and two hours to complete and cover various topics. Most of the tutorials include some instruction and then an optional opportunity to try the feature discussed by completing an exercise or short task.
These online demos and tutorials are free and should be used extensively. Employees can review the Microsoft Office Training page (http://office.microsoft.com/en-us/training/default.aspx) for more information and available training listings. This site allows the user to browse the training by application so you can select exactly what you are interested in. Note, MS Office does not have to be installed on the computer utilized for the training.

8.5 **Vendor web demos:** Some vendors offer very informative web sessions to demonstrate the functionality of new software or features/functions existing software. Many of these demos are free and only require an Internet connection and possibly a conference phone.

8.6 **Vendor Led Training:** When a new software package or upgrade is purchased for previously installed software, often the cost includes a certain amount of initial training. If not, possibly the vendor offers such training for an additional cost. While some vendor training is face-to-face, often a web delivered format is available. The responsible department should contact the vendor to discuss training opportunities and associated costs. Departments should budget for these expenses.

8.7 **Training Opportunities through Division of Distance Learning and Faculty Development (DLF):** CSM’s DLF coordinates many training sessions and workshops offered to both faculty and staff. While some topics are geared toward faculty, many would benefit staff members as well. Training offered through DLF is posted to the web site (http://www.dlf.csmd.edu/) and is advertised regularly via the Friday Report and Everyone Email.

8.8 **Shared Training Opportunities:** Training opportunities are available through participation with local county agencies. Vacant seats are open to college employees at no cost. Courses offered typically focus on business skills as well as specific technical training related to Microsoft Office applications. Classes are usually held at the CSM La Plata campus or the county government building in the town of La Plata. Courses offered and the schedule is determined by the county training coordinator. These opportunities vary from year to year and depend on the fiscal climate and county training budget.
9.0 Training Environment: CSM is very fortunate to have a dedicated administrative technical training center for staff and faculty use. This center is currently located in ST129 on the La Plata campus.

The training center houses fourteen student workstations, each equipped with an all-in-one computer and a telephone. A Smart Podium has been installed which makes this training center similar in configuration to academic labs across the campuses. The Smart Podium is equipped with an instructor workstation, DVD, VCR, receiver, document camera, telephone, connection for laptop and a touch pad screen used to control the projection system. A speaker system has also been installed which is controlled at the Smart Podium. A document scanner has been installed which can be used for many scanning needs, including in conjunction with the ImageNow application. A laser printer is installed and accessible as the default printer by all workstations; this printer has also been defined for use in all Colleague accounts as well. All workstations are connected to the college network administrative server which allows access to shared drives, the Internet and administrative software.

Standard software has been installed on all workstations such as web browsers, Microsoft Office applications, Colleague, GroupWise, ImageNow, etc. As courses, demonstrations, online training, etc require additional software, the technical training coordinator and requestor will work with technology services staff to arrange installation and configuration. All software updates and upgrades are scheduled and handled by technology services as well.

The equipment and configurations should be reviewed periodically to ensure the center will meet the upcoming needs for technical training. Equipment refreshes should be scheduled on a regular basis by the technology services department as budget allows and/or equipment becomes available.

This lab has all the components required to meet the need of an emergency command center or alternate work area in the event some area(s) of the campus are deemed unusable due to natural disaster, hazardous accident, fire, etc.

Prior to January 2011, academic labs at the Prince Frederick and Leonardtown campuses could be configured to allow access to administrative software and network drives. However, as of January 2011, as part of the on-going security initiative, in a measure to completely separate access to academic and administrative servers,
training requiring access to administrative software could no longer be held in the academic labs.

At the Leonardtown campus, an area used for storage was converted to an administrative access lab (B308) that could be utilized for training, meetings or any activity requiring several individuals together to have access to administrative functions. However, in 2014 this lab was converted for another use. Remote Lab has been utilized as needed to deliver lecture / lab format training at Leonardtown.

With the opening of the B building at the Prince Frederick campus in 2013, a portion of a classroom has been configured to allow administrative access to allow for on-campus staff/faculty training. A few workstations are available for use. This lab can be reserved through Prince Frederick scheduling.

10.0 Instruction and Training: Currently lecture / lab format courses are offered in an instructor led format, with students performing hands on activities during most classes. In addition, some courses offer an online option in addition to the lecture format. Courses are facilitated by CSM process owners, subject matter experts, technology staff or the technical training program coordinator. Courses are offered on a rotational schedule, depending on the need or business cycle requiring the particular skills.

10.1 Course Description (Syllabus): A syllabus will be developed for each course where applicable and posted to the technical training web site.

In general, included in the syllabus are the following items of information:

- Course title
- Course description
- Intended audience
- Course length
- Prerequisites
- Course outline
- Contacts for further information

10.2 Manuals (lecture/lab format): A training manual has been developed for most lecture format courses where the need is appropriate. Each participant will receive the printed manual, currently at no cost to their respective department. Course manuals may include such items as course description, custom created
presentations, screen captures for explanation, vendor documentation, policies, procedures, etc. Reference documents may also be included in the manuals.

10.3 **Online Learning:** Some courses will be offered in online format in addition (or as opposed) to lecture/lab format. The college online learning system of choice will be utilized for delivery. While printed materials will not be provided for those enrolled in online courses, links may be posted to provide downloadable versions for the student to print.

11.0 **Training Program Management:** This program must be managed efficiently in order to remain effective. Available tools should be utilized in order to manage the technical training program.

11.1 **Colleague:** From 2001 through 2014 the *CSM Training Management System*, a custom MS Access database, was used to maintain training program records. In 2015, this system was abandoned and Colleague became the system used to manage all aspects of CSM professional development and training programs (Technical Training, HRD and DLF). Legacy data from the *CSM Training Management System* was imported to Colleague in order to preserve historically accurate training history documentation.

Colleague is used for all functions required to support the training program – courses, course equates, prerequisites, faculty, course sections, person entry, documentation of miscellaneous training, correction of training history, registration, academic program entry, section rosters, grading. Colleague is used extensively on a daily basis to manage the training program.

In 2016, the use of Colleague for maintenance of the program was expanded to include self-registration through *Employee Online Services*. Not only can an employee register / drop from classes, a search for classes feature is available. Employees can also view their own transcript or schedule by term.

The *Colleague Reporting and Operating Analytics (CROA)* system, which is synced with Colleague data, must be used for reporting purposes. Reports are developed as needed.

11.2 **Technical Training Website:** The technical training program website is located at [http://info.csmd.edu/training/technical/](http://info.csmd.edu/training/technical/). This website should serve as a resource for staff and faculty to find information related to technical training. This is an ever-evolving
site which will require enhancements and updates as the program grows.

Note, prior to January 2008, the technical training site was an intranet site. Throughout the fall of 2007, Technical Training, Distance Learning & Faculty Development and the Human Resource departments worked collectively to develop a consolidated web site to offer a one-stop approach with links to all available training and development information for CSM staff and faculty.

This was an extensive initiative which accomplished:

- Development of an Internet site available on and off campus with additional links to the coordinating departments
- Conversion of coordinating department sites from intranet to Internet sites to allow access off campus
- Consistent look and navigation to training sites
- A consolidated calendar with entries for all opportunities including links to course descriptions (when available), contacts and on-line registration *(Note, use of this calendar was discontinued in 2015)*
- Open access to training information 24-hours / day, 7 days / week, on and off campus

11.2.1 Schedule: The technical training program coordinator is responsible for scheduling courses in a frequency and/or in conjunction with business cycles. Input should be requested from instructors, process owners and subject matter experts as to the appropriate scheduling of various courses in line with college business functions. Input regarding courses at each campus location should also be considered. All scheduled sections will be listed on the technical training site along with current registration information.

11.2.2 Course Descriptions (Syllabi): When applicable, a full course description and outline for each course is developed and posted online for staff and faculty to review. These course descriptions should provide information to determine if a course is relevant for a certain position and/or employee.

11.2.3 Registration Information: In 2016, use of a web form for registration was abandoned and all registration submissions began being submitted into Colleague via self-service functions accessed through Employee Online Services, which includes the ability to search for classes, register / drop from classes, view transcript and
schedule. Instructions for using these functions are posted to the technical training registration information page. A chronological list of upcoming training sections is also maintained, as well as courses that are offered in online and one-on-one formats.

**11.2.4 Training Plan:** The technical training plan should be posted to the web site for reference and review by all employees. Periodically (at least annually), this plan should be evaluated and amended based on the growth of the program. The current plan should be posted at all times.

**11.2.5 Other Information:** Components such as annual statistics, news, and contact information should be added/updated as changes in the program occur. Topic-specific pages should be added as needed to provide an avenue for distributing information to staff and faculty.

**11.3 Learn Management System (LMS):** The college online learning system of choice will be utilized for delivery / maintenance of online courses. Technical training staff will utilize the LMS for enrollment and to verify completions. Instructors will be responsible for course content, assessments, grading any assessments not automatically scored and keeping the content current. As is required for all permanent and adjunct faculty instructing an online course, LMS training (typically eight hours, offered by the Distance Learning and Faculty Development (DLF) department), is required for any instructor of an online technical training course.

**12.0 Communications:** Several methods will be used to communicate information regarding the technical training program to staff and faculty.

**12.1 Advertising** – A current training schedule will be maintained on the technical training web site. In addition, regular advertising should take place via the *Friday Report* and weekly *Spotlight on Training Everyone* Emails in order to reach as many staff and faculty as possible. Special contact to target audiences may be made with those in need of particular training.

**12.2 Confirmation appointment / email** – A confirmation GroupWise email or appointment will be sent to each participant as their registration is received. Any information needed in relation to the training (for example, online courses) will be communicated via this avenue.

**12.3 Reminder** – In order to reduce the number of ‘no shows’, a reminder email will be sent to everyone on the roster for each lecture
format section. Generally, this reminder should be sent out the business day before the training.

**12.4 Follow up email** – After attending a training session, each participant will receive a follow up email. This email will include contact information for additional questions, Colleague access requirements, etc. It will also thank the participant for attending and encourage the submission of the training evaluation if it was not completed and handed in prior to leaving the session.

**12.5 Orientations** - The technical training program coordinator will attend as many new employee orientations as possible and present information regarding technical training opportunities to the new employees.

**13.0 Feedback System:** The purpose of this phase is to determine the value or worth of each training session. At the end of each training session (if desired by the instructor), each participant will have an opportunity to evaluate the class. The feedback is consolidated for review by the instructor. The consolidated results are emailed to each respective instructor, generally within three business days. Modifications can be made to the course materials and/or delivery based on the participants’ feedback.

In addition, CROA reports should be created and maintained as need to meet need for training program information and statistics in the current period as well as extended periods of time (for instance, annual reporting). Annual highlights/statistics should be produced and incorporated into a presentation which will be posted to the web site for all employees to review.

Several training specific questions have been added to the last few Personal Assessment of the College Environment (PACE) surveys which is administered to employees every two years. Responses from these questions should be considered as input for improvements to the program as well as a gauge to measure the successfulness of the program.

**14.0 Resources Required:** Resources needed to operate the training program include both technical and non-technical resources. Those resources are outlined below.

**14.1 Technical**
- Required hardware and software for technical training center and administrative labs
• Classroom projection and sound system in conjunction with existing Smart Podium
• Projection screen
• Microphone (when needed)
• Web camera (some include microphone)
• Printer
• Wireless mouse, laser pointer, etc (as needed by instructors)
• Colleague Training Account
• Software licenses (i.e. Colleague, CROA, AdAstra, etc)
• Shared drive access appropriate for training purposes

14.2 Non Technical
• Document printing and duplication
• Binding system and associated supplies
• Special and stock paper
• Normal office supplies (notebooks, manual tabs, staples, clips, pens/pencils, etc)
• White and/or bulletin boards with appropriate markers, cleaner, erasers, etc
• Literature displays
• Refreshment supplies
• Administrative support

14.3 Technical Training Budget: The budget for technical training program will be compiled yearly in conjunction with Information Management Team budget. When appropriate, requests will be submitted yearly to the College Technology Council budget for software and hardware needs related to technical training.

15.0 Training Plan Enhancements: This plan will be review by the program coordinator and updated at least annually to address the current extent and requirements of the technical training program. The scope of this program will continue to grow and evolve; therefore the plan will be modified accordingly.