

Learning History

Designed to capture lessons learned during the dynamic process of discussion, innovation and cooperation which takes place among members of The Boston Consortium for Higher Education

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THE BOSTON CONSORTIUM
FOR HIGHER EDUCATION

The Boston Consortium for Higher Education's (TBC) mission is to create a collaborative environment that inspires its member colleges and universities in the development and practical implementation of innovative cost management and quality improvement ideas.

Babson College
Bentley College
Berklee College of Music
Boston College
Boston University
Brandeis University
Harvard University
MIT
Northeastern University
Olin College
Tufts University
Wellesley College
Wheaton College

IT Trainers: Collaboration In Action

The growth of technology innovation and usage on college campuses during the past 10 years has had huge implications for information technology training staff. Computers are firmly established as the keys to today's educational environment. However, levels of computer competency vary considerably from school to school, department to department, and individual to individual. Common information technology training challenges facing colleges and universities include:

- Developing and offering a variety of training programs that meet the diverse technology needs of students, staff, and faculty.
- Providing on demand and just-in-time training to increase productivity levels, understanding of software applications, knowledge of the Internet, and web design skills.
- Keeping current and up-to-date with the multitude of new courseware.
- Aligning training programs to the needs and work of departments, campus communities and end users.
- Overcoming hardware/software differences across campuses.
- Providing high quality, cost-effective information technology training.

In 1998, Information Technology Trainers from Boston-area colleges and universities began meeting monthly to discuss their shared concerns and interests. These sessions were convened under the auspices of The Boston Consortium for Higher Education. Founded in 1996, the Consortium is a diverse group of thirteen Boston-area educational institutions, which seeks to develop and implement innovative cost management and quality improvement ideas among its member schools.

This Learning History presents the early history of the IT Training Group's collective work and focuses on how group members discovered solutions to address common challenges to improve quality and increase cost-effectiveness of computer training on their individual campuses. Part 2 of their history (to be released Spring 2002), details the next phase of their collaborative efforts focusing on their exploration and experimentation with web-based training tools, distance education, and learning management systems.

TBC wishes to especially thank current and past members of the IT Training Group, in particular Jeanne Cavanaugh, Bill Germino, Gisele Nedeau, Doreen Nicastro, Pattie Orr and Colleen Wheeler, for their commitment to Consortium activities and their valuable contributions to this Learning History.

A Changing and Complex Environment

The needs and expectations of computer users across university campuses have increased ten fold during the past decade. Today, administrative and academic computing, research, and teaching all require significant information technology, resources, services, support and training. As well, users' needs and expectations vary widely. Some examples include:

- A student using a desktop application to create a document and logging into the network to inquire about grades;
- A professor posting a syllabus on Blackboard or on WebCT, course management systems;
- An administrative assistant checking email and converting an outline to Powerpoint slides;
- An IT professional working with computer-based group collaboration tools and voice recognition technologies.

Add the web, e-commerce, distance education, and learning management systems to the mix and one can easily see that providing information technology, resources, services, support and training in the higher education environment is a complex endeavor.

IT Training's Role Grows

Prior to 1995, information technology training departments were typically responsible for providing software training, help desk assistance, and other computer-related services. In the late 1990s, the explosion of computer availability, functionality, use, and power presented opportunities and challenges for IT departments.

On many campuses, schools responded by using a combination of centralized and decentralized approaches to training. IT professionals were hired within individual departments to meet huge and immediate demands for training. This decentralized approach facilitated staff and faculty getting the level and type of help they needed when they needed it. It also began to change the role of the IT training

In the spring of 1998, Doreen Nicaastro, Director of Training and Communications at Boston University Medical Campus, received a call from a colleague at BU who wanted IT training for her staff. Doreen explained that the newly formed IT department was planning to address training at an upcoming directors' meeting. She promised to call her with more details soon.

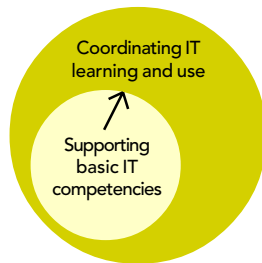
As Doreen hung up, she thought about the considerable challenges her campus was confronting in meeting the IT training needs of Boston University's Medical Campus staff and faculty. Rapid advances in technology; changing job responsibilities; constrained institutional resources; and incompatible hardware and software across the campus were creating many challenges including "skill gaps" within her institution. As well, the Internet was quickly expanding and impacting the way students, educators, staff and others were interacting. The implications for how organizations and people would function were changing in new, exciting, and unexpected ways.

Doreen was concerned. How could she convince her administration that investments in training were essential to her school's success in meeting future challenges and not just another added expense? How could she help make sure employees were proficient at using computers at their highest level? How should she work with department managers to build understanding that "technology fluency" should be part of every employee's professional development? What mix of training would be the most effective and cost efficient? Which vendors would provide the best training products and quality service?

Doreen looked forward to seeing her professional peers who were facing similar issues at the upcoming Boston Consortium Information Technology Training Group meeting. These questions would be excellent topics for discussion.

professionals from supporting basic computer competencies, to coordinating learning and the use of IT tools on college campuses. However, issues such as differing hardware, a multitude of new courseware, learning management, and duplication of services were challenging to manage within a decentralized structure.

Changing Role of IT Training Professionals



ITTG: "The Peer-to-Peer Network"

In April 1998, The Boston Consortium Information Technology Training Group (ITTG) began meeting to discuss training issues facing their colleges and universities. The ITTG is one of over fifteen groups of higher education administrative professionals facilitated by The Boston Consortium for Higher Education.

ITTG group members typically meet once a month to exchange how they are using various technologies and services, and to share ideas and experiences. The Consortium offers a neutral, no pressure setting where senior managers feel safe to discuss their priorities, planning processes, improvement ideas, and what they think the future holds for their schools and functional areas. And if and when it's feasible, managers work collaboratively to address common interests. Advancing these efforts are facilitated and supported by the Consortium's professional staff.

As with any new group, individual participants need time to get acquainted and learn about each others. This process leads to the development of trustful relationships which provide the foundation for collaborative work. During the ITTG's getting acquainted stage, group members decided to complete a formal Needs Assessment. The group developed a survey to identify common concerns and opportunities, and facilitate group discussion.

IT Training Group Members 2002

Wendy Cabot, Babson College
 Cynthia Medd, Babson College
 Matt Reis, Babson College
 Barbara Sydney, Bentley College
 Meg Jennings, Bentley College
 Jill Winnick, Bentley College
 Catherine Yang, Bentley College
 Bill D'Agostino, Berklee College of Music
 Linda Embardo, Berklee College of Music
 Frank Medlar, Berklee College of Music
 Mary Corcoran, Boston College
 David Sangurima, Boston College
 Clare Shawcross, Boston University
 Doreen Nicastro, Boston University
 Linda Jerrett, Boston University
 Alison Fox, Boston University
 Suzanne Kreinsen, Brandeis University
 John Breen, Harvard University
 Ellie Lottero, Harvard University
 Jeanne Cavanaugh, MIT
 Bronwen Heuer, MIT
 John Fotherfill, Jr., MIT
 Gisele Nedeau, Northeastern University
 Joanne Kossuth, Olin College
 Manuel Amaral, Olin College
 Mary Fitzpatrick, Olin College
 Kathleen Cummings Topalian, Tufts University
 Dawn Irish, Tufts University
 Josh Wilson, Tufts University
 Pattie Orr, Wellesley College
 Mary Adele Combe, Wellesley College
 Tracy Keller, WGBH
 Colleen Wheeler, Wheaton College

Needs Assessment Survey 1998

Eleven Consortium schools completed the Needs Assessment Survey. Findings and follow up discussions indicated that in 1998:

- Only \$400,000 was spent on IT training at the 11 schools combined.
- All combined, Consortium IT departments had 64,000 customers to service. This primarily included students, staff, and faculty members. Some schools also provided services to alumni, parents, families of employees, businesses (B2B), technical, and end users.
- Given computer usage trends, group members agreed demand would grow as more individuals would need and expect computer access, training, and service.
- Participants rated the quality of IT training classes high, but many schools were experiencing difficulty in ensuring attendance especially in core classes like Microsoft Word and Excel.
- Several schools had a high percentage of last minute cancellations and empty seats.
- There was significant duplication of classes across campuses.
- Few training departments 'charged back' training costs to individual departments.
- There was a strong need for various levels of application, hardware and technical training at the schools. Many were frustrated by the lack of specialized training available for applications such as SAS and UNIX.
- Computers were being purchased in record numbers with email systems and new applications. However this trend was outpacing IT training's ability to deliver services and support.
- Many heard from their administrators and managers that learning technology application skills was viewed as an unnecessary frill and easily postponed in the face of more immediate demands.

Summary of Results Needs Assessment Survey 1998

Total Customer Base	64,000
Types of Computers Used	100% PC 64% also Mac
Total annual spending on IT training	\$400,000
Range of spending on IT training	\$5,000-110,000
Average % of instruction outsourced	35%
Range of instruction outsourced	10-100%
Average cost/day, on-site class	\$575
Average total number of classes/month	213
Range of available seats/class	9-15
Average % of filled seats/class	58%
Range of unfilled seats/class	2-9
Approx. number of unfilled seats/year	9,400
Average cost per seat	\$100
Approx. \$ loss due to unfilled seats/year	\$94,000

In discussing the findings, ITTG members also acknowledged that they were experiencing higher levels of frustration on the job. It was increasingly challenging for them to: fill IT jobs; provide timely and cost-effective training for their staff; and juggle multiplying training and department demands. Many felt the supply of resources available was simply inadequate to meet rising expectations. They were equally concerned about technical compliance issues and their sense that their campus colleagues were dissatisfied with IT training's customer service record.

With technology moving so fast and our customers' expectations increasing, it's hard to keep up. Training is just a fraction of my job at a small school.

Pattie Orr
Director of User Services
Wellesley College

They discussed the need for IT trainers to demonstrate a full range of skills beyond technical expertise. As users became more technically fluent and experienced, many were needing less help with introductory questions and wanted higher-level assistance. This development required IT trainers to be skilled at the *art* of training including presentation and communication, as well as being an advisor/mentor/coach/consultant to students.

Learners need help navigating opportunities and options. We (trainers) can provide them with valuable insights regarding emerging technology and its relationship to what they do day-in and day-out.

Colleen Wheeler
Senior Specialist, Technology, Education
and Consulting
Wheaton College

End users were quickly beginning to see how they might use new applications and tools to achieve more complex goals. Their questions and support needs required more time and expertise. In order to meet this challenge, ITTG members realized they needed more training on the “softer side” of training -- the ability to anticipate questions, resolve misunderstandings, and evaluate the needs of users.

Shared & Immediate Benefits

With better understanding of each other’s perspectives, situations, and needs, ITTG members brainstormed possible solutions to address their similar challenges.

Massachusetts Institute of Technology (MIT), well-known for its technical training classes and seminars, offered to immediately offer open seats in these classes to Consortium schools. Announcements would be centrally posted on the Consortium’s IT training listserv so that training staff could take advantage of this high-level instruction. To address the large number of unfilled seats, schools agreed to cross register staff and faculty into certain types of training. This would help schools pool resources, expand training offerings, and provide networking opportunities for staff.

Meeting with their peers also had another unexpected benefit. Rather than feeling overwhelmed by their respective individual challenges, group members felt energized and inspired knowing that they could call on each other for advice and support.

I always come away from my meetings and discussions with my Consortium colleagues with renewed enthusiasm and new ideas.

Jeanne Cavanaugh
Manager, IS Training and Publications
MIT

These positive outcomes paved the way for additional compelling reasons to share information and collaborate. ITTG members began to explore opportunities for achieving cost savings and greater accountability from their partner computer-based training vendors.

As a group, we have much more bargaining power than one or even three schools. The possibility of creating partnerships that would deliver better quality at a cost savings was very exciting.

Micheline Jedrey
VP Information Services &
College Librarian
Wellesley College

Preferred Vendor Selection Process

ITTG members decided their first collaborative project would be to identify 'preferred vendors' for classroom based learning. Their goals were to:

- Provide up-to-date, high quality training in a variety of subject areas;
- Negotiate favorable pricing for TBC schools;
- Identify vendors who would work with ITTG to develop mutually-beneficial opportunities;
- Increase vendors understanding of higher education training needs so that they could provide better service.

Each school suggested the names of vendors whose service and reputation were worthy of recommendation. Once the list was compiled, it was distributed to each school for individual ratings. ITTG members used criteria based on their experiences, priorities, expectations, and values concerning training partnerships. (See inset for criteria used in Vendor Rating Survey.) After the survey results were tallied, ITTG members completed site visits and interviews with the highest-rated training vendors.

To achieve discounted pricing, Bill Germino, former Training Manager at Babson College, proposed negotiating a favorable price point, which would entice schools to use the selected vendors as their preferred training vendor. It was agreed that all arrangements would be non-exclusive. However, each school would use these vendors as their primary selection for outside IT training needs.

Following extensive interviews and site visits the ITTG selected five vendors. Two vendors were awarded 'top tier' status. Each of these vendors offered different types of training – one focused on basic training for end users and the other would offer specialized, higher-end, technical training. These vendors were awarded 'top tier' status given the depth and breadth of their classes and their flexible pricing arrangements. One example of such a pricing arrangement was providing 'fire-sale' classes – a 50% reduction in the price on any empty seat prior to two weeks before a class.

Preferred Vendor Rating Criteria

Instructor-led Training

Depth of PC offerings
Depth of Mac offerings
Depth of technical offerings
Open enrollment PC offerings
Open enrollment Mac offerings
Open enrollment technical offerings
Quality of courseware
Quality of instructors
Ability to offer LearnPro style class

Pricing for instructors

Overall price competitiveness
Options/flexibility for 1/2 day pricing

Related-services

Web-based training
Follow-up phone support
Web-based registration
Skills assessment
Marketing of schedule
Custom documentation services
Computer-based training
Certified testing center facilities

Vendor training sites

Appearance/organization
Refreshments
Parking
Quantity/diversity
T-accessible

Operations

Knowledge/experience with higher ed
Retention of account reps
Willingness to work with other vendors
Ability to handle high request volume
Merger/acquisition potential

Bringing Vendors Together

The two 'top tier' vendors agreed to meet with the ITTG to strategize how best to 'roll-out' their programs and promote the Consortium partnership. ITTG members noted that this was the first time in their experience when two competing vendors were willing to come together to discuss benefits of partnership.

Engaging vendors in discussions about how to increase quality is a good thing. And if we can get vendors to communicate with each other, it helps to reduce the confusion caused by too many players and products.

*Bill Germino
Former IT Training Manager
Babson College*

We are grateful to be a preferred vendor for The Boston Consortium. The opportunity to provide training and education to the faculty and staff of some of the most prestigious U.S. colleges and universities is truly exciting.

*Dan Allen
Senior Account Executive
New Horizons Computer Learning Center*

Group members developed the strategy and agreed to a name to market their partnership: The "IT Higher Education Learning Partnership" (IT HELP). This new program would be the vehicle for convincing their peers and administrators on their campuses of the benefits of partnering to improve training opportunities.

This partnership takes the burden off my department to develop specialized training internally. We have found that vendors understand it is their best interest to keep up with technological changes and provide high quality, just-in-time training.

*Gisele Nedeau
Assistant Director for Training Services
Northeastern University*

Additional Lessons Learned & Benefits

In 1999, one year from the start of the preferred vendor selection process, Bentley College hosted a 'Meet the Training Vendor Fair'. The IT HELP Program was unveiled to approximately 30 training managers and human resource representatives across Consortium schools. At the event, staff learned how their school community would benefit from the IT HELP program. Today, Each school maintains their individuality by choosing their own method for promoting and rolling out the IT HELP Program. Many use it as a compliment to a host of other professional staff development trainings; others post the information with direct links to the vendors on their school's training web pages. Many schools have made it a part of their training by offering the classes on site with a vendor trainer.

Between July 1, 1999 and December 31, 2001, the schools participating in the Consortium partnership **cumulatively spent \$688,503 on training programs** with the two 'top tier' vendors. Cumulative savings during this period – as a result of leveraging the collective buying power of the schools and negotiating a favorable price point — **was \$550,003 or a 44% reduction of costs.**

The IT trainers' success also is demonstrated by feedback received from their colleagues:

The Consortium is at its best when it brings together professionals from our campuses to find cost-effective solutions to address our common concerns.

*Will Reed
Vice President, Wellesley College
Chairman, The Boston Consortium*

IT training is vital to attract and retain competent staff. In addition, sharing information and collaborating with our colleagues enables us to stay current on industry trends and proactively respond to our mutual challenges.

*Maureen Fessenden
Associate Vice President
Human Resources and Employee Relations
Brandeis University*

Another valuable outcome of the collaboration has been the establishment of trustful relationships between Consortium schools IT Trainers. It has allowed the IT Trainers to deliver more innovative service to their schools and be prepared to handle future challenges.

The real value for me is knowing that I can pick up a phone and call any of my colleagues to discuss a challenge or problem, and more importantly, knowing that a potential solution is out there... just across the river, in the suburbs, or out in farm country.

*Doreen Nicastro
Director of Training and Communications
Boston University Medical Campus*

The Burning Questions

As the IT HELP initiative started deployment at the individual schools, the IT Trainer group knew that this was just the beginning.

They realized that IT training was increasingly viewed -- both inside and outside of higher education -- as a strategy for organizational growth, innovation, professional development, and retention. This factor, combined with the pressure to keep up with the fast pace of changing technology, was foremost on their minds. The burning questions they discussed:

- What is the real level of commitment to IT training and support?
- What level of financial resources are available to meet the challenges?
- What are considered “core” technology skills?
- How can we best provide just-in-time training?
- How are staff and faculty using current and new technologies?
- How best to capture use data to better understand constituency needs and interests?
- How does one learn without a formal training program in place?
- How can schools develop comprehensive training that gives users quality courseware on demand and at a variety of levels?
- How best can IT training programs foster independent active self-initiated learning?
- What kind of training program can effectively address the mix of hardware and software found on university campuses?
- What kind of training delivery structure and system is the most effective?
- What kinds of training and support do IT training professionals need to do their jobs effectively?

The Future

As members of the ITTG discussed questions of how to elevate learning as a strategic priority at their schools, the web was making major inroads at college campuses, and e-learning was the latest buzz. Additional questions were raised:

- How best to support the movement to training customization?
- How can we help each other evaluate the overwhelming array of new learning tools, “testbed” opportunities, and environments?
- Where might we find additional funds to help support our progress?
- How can we partner with human resources to achieve our mutual goals?
- How can organizations build the most effective messages and internal marketing in support of learning?
- Where’s the biggest bang for the buck? Where’s our energy?
- What has worked well in our group process? How might we improve it?

Answering these questions quickly became the new focus for this dynamic group of training managers.

Stay tuned: Part 2 of IT Trainers’ history will be released Spring 2002. This Learning History will detail the next phase of their collaborative efforts focusing on their exploration and experimentation with web-based training tools, distance education, and learning management systems.



History & Background

The Boston Consortium for Higher Education (TBC) is a not-for-profit membership organization founded in 1995 by the chief financial officers of Boston-area colleges and universities. Its mission is to create a collaborative environment that inspires member institutions in the development and practical implementations of innovative cost management and quality improvement ideas. TBC assists higher education professionals and institutions as they envision the future, initiate dialogue, share knowledge, create trustful relationships, and build collaborative partnerships that enable them to realize their goals. The Boston Consortium actively:

- Facilitates 'communities of practice' for dialogue, innovation, shared effort, and mutual learning between and among its member schools;
- Advances initiatives and programs which are quality-enhancing, practical and cost-effective;
- Supports the creation of economies of scale and intellect to push administrative costs down and drive quality up;
- Enhances individual and organizational capacity by supporting work-based learning and offering professional development opportunities.

The Boston Consortium is unique among consortia. Where traditional consortia focus on combining forces for the primary purpose of purchasing goods and services at reduced rates, The Boston Consortium goes a few steps further. Our distinction is that we also provide informal forums for leaders and senior managers from non-academic functions to explore similar interests and concerns. Consortium participants embrace sharing best practices, utilizing systems thinking, and engaging the intrinsic motivation to excel. They use The Boston Consortium to augment and expand their on-going efforts to reduce costs and improve operations on their individual campuses.

The Consortium's successes demonstrate how each school benefits from their association as well as how collaborative actions can extend and even multiply increasingly constrained resources.

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The Boston Consortium Learning History is published periodically. Please address questions, comments, and Learning History ideas to:

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