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

report from

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 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, understanding of software applications, knowledge of the Internet, and web design.

- Keeping current and up-to-date with the multitude of new courseware.

- Closely aligning training programs to the work of departments, campus communities, and the individual needs of end users.

- Overcoming hardware/software inconsistencies across campuses.

- Providing high quality, cost-effective training.

In 1998, Information Technology Trainers from Boston-area colleges and universities began meeting regularly 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 Winter 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.

In the spring of 1998, Doreen Nicastro, 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.
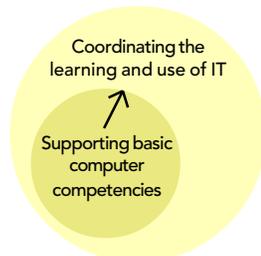
As Doreen hung up, she thought about the considerable challenges her campus was confronting in meeting the IT training needs of Boston University's Medical Campus staff and faculty. Rapid advances in technology; changing job responsibilities; constrained institutional resources; and incompatible hardware 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 the similar issues at the upcoming Boston Consortium Information Technology Training Group meeting. These questions would be excellent topics for discussion.

A Changing and Complex Environment

The needs and expectations of computer users across university campuses increased considerably 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 experimenting with computer-based group collaboration tools and other new 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

professional from supporting basic computer competencies, to coordinating learning and the use of IT tools on college campuses.

Growth of the Role of IT Training Professionals

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.

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 member schools' administrators 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, the schools are encouraged to work collaboratively to address common interests.

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 to know you" stage, group members embraced the idea of completing a formal Needs Assessment survey. The survey was created to identify common concerns, understand opportunities, and facilitate discussion.

IT Training Group Members 2001

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

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

Todd Lamothe, WGBH

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 which included students, staff, faculty members, 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.

- 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
were linux and unix represented?	
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	$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 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 the sense that their 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 agreed that IT trainers needed a full range of skills that went beyond being technical experts. 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

Armed with better understanding of each other's perspectives, situations, and needs, ITTG members brainstormed possible solutions for their challenges.

Massachusetts Institute of Technology (MIT), well-known for its technical training classes and seminars, offered to immediately open these classes to Consortium schools when they had availability. 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 high number of unfilled seats, schools agreed to cross register staff and faculty into certain types of training. This helped the schools pool resources, expand their training offerings, and provide networking opportunitiesfor staff.

Meeting with their peers also had another unexpected positive outcome. 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*
> *Information Systems Team Leader*
> *MIT*

These positive outcomes paved the way for additional compelling reasons to 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.
>
> *Michelle Jedry*
> *VP Information Services &*
> *College Librarian*
> *Wellesley College*

Preferred Vendor Selection Process

ITTG members decided their next project would be to identify 'preferred vendors' for classroom based learning (CBT). 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. For Example, 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 the 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 ____
> > Babson College

> Need a quotes from Pinnacle's president and Dan Allen at New Horizons. They were both VERY involved and willing to take a risk with us.

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

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 June 30, 2000, the eleven schools who participated in the Consortium partnership invested $242,849 in the IT HELP Program. Total savings during this period – as a result of leveraging the collective buying power of the schools and negotiated favorable price point — was $179,559.

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

> (Being part of) the Consortium is gives us added knowledge and power to find more cost-effective solutions which make an important difference.
>
> > Will Reed
> > VP, Wellesley College
> > Chairman, The Boston Consortium

> To attract and retain quality employees, we need to ensure our staff is fluent in information technology. The work of the Consortium IT Trainers' group helps us make an important contribution to the development of our staff.
>
> > Maureen Fessenden
> > VP, Human Resources
> > 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 of their work together.

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 during Winter 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 system

History & Background

The Boston Consortium for Higher Education was established in 1996 by Chief Financial Officers from Boston-area four-year private colleges and universities to address a shared interest: how to make higher education affordable for all students.

The Boston Consortium is a vehicle for its member schools to explore ways to lower costs and maintain or improve quality through collaborative action.
A nonprofit organization, the Consortium:

- 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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