September 9, 2020

Management Training Protocol

Purpose

The value and benefits of workforce training are many. Training can make staff more efficient by increasing productivity and decreasing costs, waste, and inefficiencies. Effective training can also lead to increased compliance with City policies and guidelines. If successful, a more satisfied and engaged workforce will reduce turnover and the disruption and costs associated with hiring new employees.

Scope

This management training protocol is intended to create more effective training of end users for systems implemented by the Information and Technology Management Division. This document should serve as an effective guide to workforce training solutions for the purpose of effective training as outlined above. The training should be focused so as not to include too much information, support true business goals, and only address problems that training can fix.

This management training protocol relates to those systems installed and maintained by the Information and Technology Management Division. Public Safety (MPD & MFD) and elected officials' departments (City Clerk/Common Council, City Treasurer, City Comptroller and City Attorney) maintain their own systems and are therefore not covered by this protocol. However, these departments should review and consider integrating these practices as part of their department procedures.

Management Training Protocol Steps

Step 1: Perform a Training Needs Assessment

As part of any new software deployment and general project management process, perform a training needs assessment. This includes:

1) Work with the user group(s) to identify the clear business goals that this software and the associated training supports:

   The training must directly support the business goals. Business goals include things like increasing efficiency or decreasing costs and waste. The new software isn't implemented simply to replace an existing solution doing everything in the same manner as the old solution. Rather, the new software may require performing different tasks or performing tasks in a different manner to meet the clear business goals.

2) Determine the tasks the staff need to perform using the software so that the business goals can be met:

   Once the business goals have been identified, the process and tasks utilizing the new software need to be identified that enable staff to meet those business goals. The focus should be on what is new or different than the previous solution so the staff can learn how to perform those new tasks and “unlearn” old methods that are no longer needed. This may require reviewing job descriptions to identify those tasks, or even updating job descriptions if those job tasks will be changing.

3) Determine the training activities that will help the staff learn to perform the tasks

   Identify the training activities that will help staff learn to do these tasks using the new solution. This may include a short explanation of the new software, a short overview of the new process, and demonstrations mixed with hands-on practice of the tasks staff will have to perform to complete the job.

4) Determine the learning characteristics of the staff that will make the training more effective

   Consider the characteristics of the staff to determine the type of training that will be most effective for them. In small groups, training may be catered to each individual, but in larger groups it will be necessary to find common characteristics of the group as a whole, such as are they more comfortable with computer-based training or instructor-led training; do they like self-guided or self-paced learning, or would they struggle in that environment; do they learn better from reading, listening, or doing; etc. Training should consider several different methods to provide a better opportunity to reach everyone.

   As part of this, there should be a focus on adult learning principals. Adult learning principals are tailored to those characteristics shared by adults to make training more effective for them. Adult learners:

   - Are self-directed
   - Come to training with a lifetime of existing knowledge, experience, and opinions
   - Are goal-oriented
   - Want training that is relevant
   - Want training that is task-oriented
   - Learn when they see “what’s in it for them”
   - Want to be and feel respected

Step 2: Develop Learning Objectives

Based on the training needs assessment, a list of learning objectives should be developed that outlines what the staff must be able to do after training. Learning objectives can be structured around frameworks such as SMART and ABCD:

> When you write an objective, it should have five characteristics, known collectively by the acronym SMART. The objective should be specific, meaning it’s very clearly stated and its meaning is equally apparent to everyone. It should be measurable, meaning everyone

can agree if the learner satisfies it or not. It should be achievable, meaning the learner truly has a chance to satisfy it. It should be relevant, meaning it's important for the worker's job. And it should be time-bound, meaning it will be clear when the learner must be able to satisfy the objective (typically, after training).

A learning objective should include four parts, which you can remember with the letters ABCD. It should include an actor who will perform the objective (the employees being trained). It should include a behavior that the actor must perform (this behavior should be stated as a verb that defines the workers' behavior, such as "recite" or "turn"). It should include conditions under which the employees must perform the behavior (for example, "given a wrench, the employee must…"). It should also include the degree to which the employee must perform the behavior (for example, "90 times an hour").

Step 3: Designing Training Materials

While designing training materials, keep the following points in mind:

- Always focus primarily on the learning needs of your employees, and not on what's easy for your trainers
- Only create training content and assessments that relate directly to your learning objectives
- Remember the adult learning principles
- Include as much hands-on practice or simulation as possible: people learn by doing
- Whenever possible, put the employees in control of the learning process (instead of the trainer)
- Do everything possible to let the employees talk and interact with the trainer and with each other during the training
- Make sure there's plenty of opportunity for feedback during training
- Break your training materials up into small "chunks" that are easier to take in and understand
- Order your "chunked" training materials in a logical manner—one step that builds on top of another, or chronologically, etc.
- Try to use a "blended learning" approach that includes training in several different formats (computer-based, instructor-led, etc.).
- Try to integrate storytelling and scenarios into your training

Step 4: Develop Training Materials

While pre-built training materials may be available from the software vendor, they should be customized or integrated as only a portion of the training so as to meet the criteria developed in the previous steps. The training materials should cover the learning objectives—and nothing but. In addition, any quizzes, tests, case studies, or hands-on exercises performed during training to evaluate staff comprehension of the training should assess only the staff's understanding of the objectives. These materials may take the form of tradional PowerPoint presentations, online videos, interactive web-based training, e-learning modules such as Canvas, Desire2Learn, Moodle or Blackboard, or other tools. While creating materials, always keep in mind two primary concerns: (1) the things that will help your employees learn most effectively and (2) the learning objectives.

Step 5: Implement the Training

Training should be provided with ample notification and organized in a way to minimize disruption to regular operations.

The actual training may take a variety of forms. It may be classroom instruction; small group assignments; on-the-job skills-based training; the delivery of paper-based hand-outs for individual reading and study; the completion of e-learning modules on a computer; a combination of some or all of these; or more.

When developing training, exactly what the employees must do to demonstrate competence must be identified. Define this in advance, when you're creating your learning objectives, and don't leave it unstated or vague.

Step 6: Evaluate the Training

To confirm that the training was effective, staff should be observed when they're back on the job to evaluate the effectiveness of the training. The means to evaluate the effectiveness include:

1) Employees' reaction to training:

   Did the employees like the training? Did they feel like they learned? You can find this out by observing the employees during training, asking their opinions, or handing out surveys. You can hand out paper-based surveys after training if you want, but you may get better results if the survey is online and anonymous.

2) Employees' actual learning:

   Assessments during the training should evaluate the employees' actual learning of the objectives. This might include simple tests for knowledge issues, or case studies, job simulations, or hands-on exercises for skills and attitudes.

3) Employee's post-training job behavior:

Are the workers taking the new knowledge/skills/attitudes from training and applying them at work where it counts? Observations of the employees' on-the-job work behavior will determine this, as will other performance-based metrics.

4) Quantifiable business results:

Did the training result in reaching the desired business goals (identified in step #1)?

Step 7: Repeat Any Step When Necessary

If the original training proved to be ineffective at any of the four levels, revise at repeat the training as needed. Include the training as appropriate as part of any new employee orientation.