The Training proposal for 'Training the Trainer'

The Office of International Programs

A commitment to customer service

Prepared By: AiXia, BS, MSIT Graduate Student

Newman S. Lanier, BS, MSIT Graduate Student

For: Assistant Provost Dr. Adrian Sherman, Director
UNCW International Programs

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Executive Summary

The Office of International Programs (OIP) is a UNCW department in the Division of Academic Affairs, and it is tasked with increasing the international dimension of the UNCW campus.   The operations are split: One half deals with students and faculty going abroad and the other half deals with students and faculty coming to UNCW.   The director of the office is an assistant provost and manages 16 full-time time employees, and part-time student workers.   This year, 431 students and faculty went abroad in 47 programs and 120 students came to UNCW from 41 foreign countries.   The OIP plans and implements programs in support of these customers.

Meeting the service needs of its community is the overall goal of the Office.   Helping students plan and prepare for trips abroad and helping international students before and during their studies here, are the primary goals of the system.   International students, according to a survey, are not impressed with the OIP customer service, particularly in the area of "staff knowledge".   The directors of both subdivisions, Study Abroad (SA) and International Students and Scholars Services (ISSS) have noticed an inefficient office workflow and low morale among staff.

Currently, neither formal training nor standard reference material is provided for new employees. The coaching and on-the-job training received by the staff is not systematically implemented nor measured for effectiveness.   Because of this, customer service, particularly with International students, is low.   This has led to attempts at formalizing office training, increasing the number of staff, and providing reference material for all staff.

The most effective method to improve international student customer satisfaction is to implement an initial and recurrent training program, to include all office duties and specific skills that support the goals of the department.   Subject matter experts and training professionals, both internal and external to the organization, would design and develop the training program based on the research and recommendations in this proposal and the front-end analysis.

The process for designing, developing, implementing, and evaluating the proposed training is detailed in this document.   In it, we detail the products and tasks needed, which we organize into phases of development. In the appendix, you will find charts and graphs that represent the process, the staff requirements, and an estimated budget.

Problem Statement

The unit of International Student & Scholar Services (ISSS) falls organizationally into the Office of International Programs (OIP) of UNCW, which is under the purview of the academic affairs department. OIP is split into five groups, three operational and two in supports. The operational units are – English as a Second Language, Study Abroad, and ISSS.   And the support units are Office Management and Administrative Support. Of them, ISSS is a key service window of OIP, which serves more than 100 international students, scholars, faculty, and their dependents, as well as producing international programs in support of the OIP mission.

The observation data shows that currently students who refer to the ISSS for help are not satisfied with the assistance that they have received, and revisiting and/or visiting back for the same case often happen to students in need of relevant assistance. "I", as an international student, is a case in point. There is no case that has been solved immediately, need visiting back at least for two times, during my six visiting experiences for separate problems. The same complaints, I heard from my Chinese friends and several Japanese friends during my ESL class and leisure communication. In addition, the director of ISSS, reports that staffs are not using the database available to search and track their work for service efficiency when providing assistance. Of 13 staff members, just two use the database software when providing assistance, making up 20% of all staff. Observation and survey among the international students hint that staff providing assistance is not knowledgeable and competent; interview records show that current lunch hour training is not professional and enough, there is no formal training in the job tasks for the staff, and there is no performance measurements to assess current staff or hire new staff.

The director of ISSS is concerned that not taking the problems seriously and solving it may result in decrease in enrollment of international students and scholars and the number of UNCW students and faculty studying abroad as well as international exchange program. As a result, it impacts seriously the accomplishment of the mission of OIP to develop and increase the international dimension of the UNCW campus. Consequently, the director wants to improve customer service efficiency to achieve 80% customer satisfaction in the rest of this academic year measured by a survey through enhancing knowledge and skills of staff providing customer service and increasing the number of staff who can use the database when assisting customers from UNCW to 10, making up 92% of all staff.

Proposed solution and rationale

As revealed by the frond-end analysis, the most effective solution for closing the performance gap identified among the OIP is the implementation of a weeklong instructor-led training program plus a post-training test and survey.

To begin the implementation of the solution, a team of instructional designers, a subject matter expert, a training specialist, and an evaluation specialist will be developed. Besides this core team, other excellent personnel, from the international programs among UNC 16 universities, will be hired to participate in designing and developing instructional products, consult on the content, and oversee with formative and summative evaluation for the training. Six directors that will be trained to be the trainers will be required to participate actively in the design and development of the training to ensure usability and success and professionalism of them training other staffs among the OIP.

The training program is designed for training the trainers that will then diffuse the same training to other staffs, within respective office or through hybrid small group training session among the OIP. The designed training program will involve five topics, two hours each: how to teach, ISSS, SA, OIP service policy and workflow, and the administrative office (general customer service). The session "how to teach" focus on the training method as well as knowledge, attitude and skills related to conduct training among other staffs; The session ISSS and SA will emphasize knowledge, attitude, and skills necessary for the staff to serve the customers well. These two sessions will be implemented cross concurrently with their correlation to service content and procedure; the session of OIP service policy and workflow will focus on the entire workflow that happens to the OIP as well as service policy related to job areas; The last session will be designed for the staff working at the front desk, focusing on knowledge, attitude, skills about how to provide right assistance with the right operation office. In each topic's training, both the instructor guide and the student guide will be utilized during and after the training. Furthermore, job aids, job reference material, an FAQ section will be developed and distributed among all staffs in the OIP to extend the diffusion of the training program in daily practice to achieve the staff's proficiency in job tasks. Participants will be involved in all topics' training with some real cases occurred in the office of international program.

An instructor-led "training the trainer" training program during the lunch hour has been chosen for many reasons. First and foremost, currently each staff is very busy with service requested by the customers although the customers are not very satisfied with service due to low work efficiency based on survey. For a service department, persistent and effective customer service is of the essence for it to exist in the world. That all staffs participate the training at the same time is impossible. Among the OIP there is a wide range of knowledge and skills between directors and other staffs. The "training the trainer" training program not only can avoid extra work hours of the Directors but also can sustain the normal service of the system. Furthermore, it also can enhance effectiveness and efficiency of the training that will be diffused across all staffs of the OIP. Second, the diffusion scope of the training program will be very small scale and not complex. The instructor-led training will provide more structured learning-by-doing practice as well as timely and effective guidance requested by the individual learner through the training process, comparing to

computer-based or web-based training. Timely interaction and communication that happens to the process is very helpful to assimilate knowledge and skills learned with the learners. Among the training cooperative learning strategies such as discussion groups and role-playing activities across the learners will be implemented easily and effectively in order to familiarize them with each other's job task area and relevant procedure. More importantly, the instructor-led training will be very useful and effective in demonstrating a complete training process for training the trainee with the learners, which is a key for the learner to be good trainers for the second round training among the OIP. Third, resources and cost is an additional consideration for choosing an instructor-led "training the trainer" training program over web-based or computer-based training. For small budget need, the assistant provost director is able to solve it within the OIP and don't need to ask for the affiliated administrative personnel or department. Instructional development and delivery capabilities identified in the front-end analysis are enough just for the proposed solution. The point is that the proposed solution can solve the performance problem identified with available cost and resources on site and is supported by all staffs in the OIP.

To assess effectiveness of the proposed solution, a post-training test for knowledge, attitude and skills among all staffs and customer satisfaction survey for the customers will be developed. The result of them will work as a guidance of the OIP's future efforts on its mission.

Products

Instructor's guide -

This deliverable will be used by the instructor to plan, prepare, and teach the workshop. It consists of a 3 ring binder to be used by the instructor to plan and teach the workshop. It is broken down into three parts: Front-End Material, Presentation Guidance, and reference Material. The Front End material is simply everything that the instructor needs "in the front" or at the beginning of the class. It is made up of many elements outlined in the appendix section 'The instructor Guide'. The key elements are a detailed outline of the topic content, procedure, and weeklong workshop schedule; and a logistic section listing needed material for each section. For the OIP, this section should include an outline that establishes the how the material is organized and sequenced and how it is broken down into lesson sections. Another important section is the glossary that defines key terms relevant to the OIP operations and instruction.

The Presentation guidance section includes tips and 'best practice' teaching methods which are agreed upon by the designers and validated by formative assessment. This section also lists equipment and material to be used by the instructor and any activities to be completed by the student. For the OIP, instructors will learn how to lead discussion groups and role-playing activities from this section. And, any worksheets, learning games, or activities (and the evaluation methods) would be included in the presentation guidance section of the instructor's guide.

Finally, the reference section would include copies of all student material and reference material relevant to the course. This section of the Instructor's guide is the 'required reading' for both the student and the instructor. It should include the workshop student guide, handouts, background reading in content and teaching methods, and 'OIP handbook'.

Student's guide -

The Student guide is a packet of material that is used by the student during the instruction and as a reference after the instruction is complete. It includes two sections: front-end material and lesson guidance. The front-end section's key element is an overview of the workshop that communicates the expectations of the student achievement including grading procedures and classroom procedures, among other topics that address the workshop atmosphere. Above all, it should be written from a student perspective and provide firm orientation to the workshop. OIP training sessions will happen during the lunch hour and the atmosphere must be light and conversational. Also, the glossary of OIP specific terms is included in the front-end material. The second section is the 'Lesson Guidance'. It is a detailed, chronological guide to each lesson section and includes: objectives of the lesson, needed materials and equipment and time to complete the lesson, activity explanation and instruction, reading material, and self-testing material.

Instructional materials -

Instructional materials for the student

- An organization chart - used to explain the job descriptions and responsibilities of each member of the office

- A world map - used to explain where international students come from and where study abroad students go to

- Artifacts from various countries - coins, artwork, money, flags, photos

- A FAQ document - used to explain the common questions answered by OIP staff.

Instructional materials for the instructor

- Cooperative learning strategies - Because of the conversational style of a luncheon workshop, the lessons must be implemented easily and effectively with humor and light atmosphere.   Cooperation between all staff is a key to success and can be supported by role-playing and small group discussions.

- Discussion group activity ideas

- Role-playing activities

- Matrix for the instructor to use (for grading or evaluation) - Student assessment materials - Tests and activities that assess student learning and achievement of the class objectives.   Discussion and Role-play activities are more difficult to evaluate than multiple-choice tests.   This deliverable will assist the instructor in making meaningful evaluation of student learning.

Materials for awareness activities –

Flyers or email announcements will be created that introduce the workshop to the trainees and explain what is expected of them and what they will need to bring. As well as date and time and who is expected to attend with the topics and instructors also listed.   This will be distributed at the staff meeting the week before the training and attached to the minutes.

Certificate for workshop participants –

There will be two series of workshops: Round one and round two. Both sets of graduates will receive a certificate identifying new skills and knowledge.   As identified in the FNA, student staff are motivated by 'resume building' and career path.   A certificate is a meaningful evidence of acquired job skills.

Materials for evaluation –

Formative Evaluation packet - training should be tested in a one-on-one and small group scenario, in order to get feedback and make improvements before implementation.   Each component must be evaluated, as well as the whole workshop.   This deliverable will be used by the person performing the formative evaluation and include surveys, as well as interview protocols and observation worksheets.

Summative Evaluation packet - Summative evaluation tests for the effectiveness of the workshops for meeting objectives and solving the performance problem. This deliverable consists of all workshop material and formative evaluation surveys. An evaluation specialist will conduct a summative

evaluation of the program in the Spr08 semester based on the information in this package.   At this time, the workshop will have been completed twice (at the beginning of Fall07 and Spr08 semesters), and will have allowed time for the changes to be diffused through the office.

Project description

Project planning phase

Tasks:
    Hold project planning meeting
    Generate rough draft of project development plan
    Get project development plan reviewed and approved
Staff:
        Lead Project Manager
        Asst. Project Manager
        Administrative coordinator
        Instructional Designer 1
        Instructional Designer 2
        Subject Matter Experts-two directors
        Secretary
Time:
        12 days (Late May)

In this phase the instructional designers plan the entire project. A Project planning meeting is held to discuss staffing, schedule and goals of the project.

Lead instructional designer and the Project manager discuss the project at an operational level. The products of these discussions are: a rough draft of the project development plan, a staffing plan and a budget. This step ensures expectations are clear and known to between Project manager (client side) and Instructional designers (contractor side). The output of this phase is a clear vision and plan for the project.

Content planning phase

Tasks:
    Hold content planning meeting
    Analyze content and tasks
    Identify goals and objectives
    Plan rough project deliverables
    Produce a prototype of the project content plan
    Validate and finalize the project content plan
Staff:
        Instructional designer 1
        Instructional designer 2
        Subject Matter Experts-two directors
        Assistant manager
        Administrative coordinator
        Secretary
        Technical writer
Time:
    6 days (May 14 – May 21)

In this phase the instructional designers use the front-end analysis document to do the majority of detailed planning for the training content.

The first priority is ascertaining the workshop goals and deriving the objectives from those goals.

The Instructional Developers will work as SMEs to provide objectives that address the OIPs goals and need. The instructional designers will work to create a task analysis and organize the content into user friendly 'chunks'.

At this point, assessment items are planned and test specifications created. This is the responsibility of the evaluation specialist / test developer.

The guidebooks for both the students and instructors are planned in this stage, as well as any instructional materials.

The end of the phase is the validation of the planning package, which includes task analysis, test specifications, and instructional strategy. This package must be validated and reviewed by the project manager.

Development Phase

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Tasks:
    Hold deliverables development meeting
    Develop assessments
    Develop instructional materials
    Develop instructor's guide
    Develop student's guide
    Edit deliverables
    Review deliverables
    Conduct formative evaluation
    Revise project deliverables
    Print project deliverables
Staff:
        Instructional Designer 1
        Instructional Designer 2
        Technical writer
        Subject Matter Experts-two directors
        Administrative Coordinator
        Field test instructor and learners
Time:
    31 days (June 5-July 17)
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In this phase the asst. instructional designer along with the Art director and content experts develop the guidebooks and materials for use in the workshops (both round one and round two) based on the previous planning phase.

The instructional designer and the content experts produce the Instructor and Student guidebooks and all off their components as described in the 'Deliverables' section. Of particular importance are the assessments instruments, which will help the instructors provide meaningful feedback and support to the learners. The assessment must be inline with the objectives and goals of the workshops.

The art director establishes the look and feel by choosing colors and layouts, fonts and works with the photographer to capture the correct photographic elements, which communicate the desired message.

The editor / writer is involved to create and assist the others in maintaining a cohesive and pleasing

text content that compliments the other elements of the workshop.

The products developed here will be a valuable teaching tool, as well as help edify the body of knowledge for the OIP staff.

The formative evaluation is planned, built, and conducted.   Time must be allowed to conduct at least one-to-one user testing of the all student and instructor material (Guidebooks, manuals, job aids, teaching aids and materials), as well as a full evaluation of the entire training package.

In this phase the asst. instructional designer along with two directors take the materials and conduct a small group field test.   This is the dress rehearsal of the training workshops.   This is done to allow feedback and revision for improvement of the final product.

Implementing phase

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Tasks:
    Hold a workshop meeting
    Plan workshop logistics
    Locate training facilities and equipments
    Develop awareness materials
    Review awareness materials
    Implement awareness activities
    Proceed registrations
    Conduct training the trainer workshop
    Implement training
    Complete training
Staff:
        Lead Project Manager
        Asst. Graphic Designer / media specialist
        Training specialist
        Instructional designer 1
        Instructional designer 2
        Round one instructor
Time:
    25.5 days (July 18-August 24)
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In the Implementing phase includes the final preparations and actually conducting the workshops. The awareness material implementation is also included.

The Project and assist project managers set the dates and arrange the specifics of the training workshops. With this information, the Art director, Writer / Editor, and media specialist can build the awareness materials. The Awareness materials need to be implemented - there should be a flyer or announcement to the staff.

The Round one instructor conducts the workshop.

Summative Evaluation phase

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Tasks:
    Plan summative evaluation planned
    Develop relevant evaluation materials
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Conduct summative evaluation
Product summative evaluation report
Review summative evaluation report
Staff:
  Lead Project Manager
  Assistant manager
  Two directors
  Administrative coordinator
  Instructional Designer 1
  Instructional Designer 2
  Technical writer
  Evaluation Specialist - Test Developer
Time:
  25 days (August 27- October 2)

This is the closing and final stage of the project.

The test / evaluation team plan and conduct summative evaluation. This summative evaluation seeks to find if the project has reduced or eliminated the performance problem and to what degree. The summative evaluation should be conducted in the Spr08 semester to allow for effects of the training intervention to be realized.

Appendix 1: Milestone events and activities

Project Planning Phase

Hold project planning meeting

Generate rough draft of project development plan

Get the project development plan reviewed and approved

Content planning phase

Hold content planning meeting

Analyze content and tasks

Identify goals and objectives

Plan rough project deliverables

Produce a prototype of project content plan

Validate and finalize the content plan

Development   Phase

Hold deliverables development meeting

Develop assessments

Develop instructional materials

Develop instructor's guide

Develop student's guide

Edit Deliverables

Review deliverables

Conduct formative evaluation

Revise project deliverables

Implementing phase

Hold a workshop meeting

Plan workshop logistic

Locate training facilities and equipment

Develop awareness materials

Review awareness materials

Implement awareness activities

Proceed registrations

Conduct training the trainer workshop
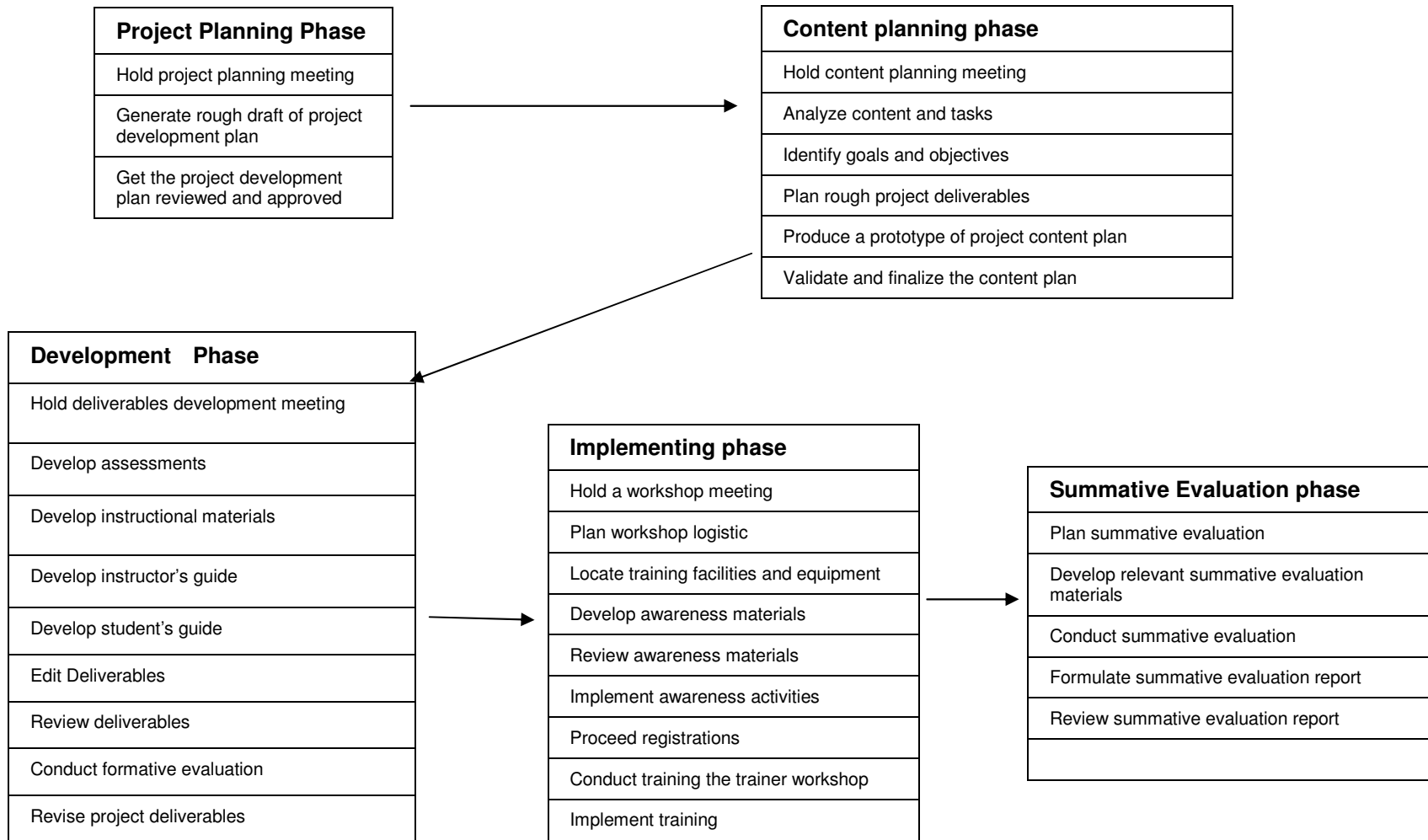
Implement training

Summative Evaluation phase

Plan summative evaluation

Develop relevant summative evaluation materials

Conduct summative evaluation

Formulate summative evaluation report

Review summative evaluation report

Appendix 2: Staffing

Lead Instructional Designer, Student Hire – This person should have completed the first year of the MIT program (MIT 500 and 510), or have equivalent experience with instructional design projects. They supervise the assistant instructional designer directly and oversee the ID (instructional design) portions of the project.

Asst. Instructional Designer, Student Hire – This person should be enrolled in the MIT program or have interest and experience in Instructional design. They perform tasks as delegated by the Lead Instructional Designer and assist other project team members in the area of instructional design.

Lead Project Manager, OIP staff – This person takes responsibility for the entire project. They ensure and validate all stages and products of the project are acceptable and meet the goals and objective set in the project plan.

Asst. Project Manager - Administrative assistant, OIP staff – This person assists the lead project manager and provides clerical support for the entire project.

Editor/Writer, Student Hire – This person is in charge of all written material for the project. Their duty is to ensure all end-user documents (student and instructor guides, most importantly) and cohesive and understandable. This person may come from the creative writing program.

Art Director / **Graphic Designer**, Student Hire – This person sets the aesthetic (colors, fonts, layout, etc.) of all end user documents. This person is in charge of supervising and directing the asst. graphic designer to ensure an appealing and cohesive visual appearance for all end user documents. This person may come from the fine arts or film studies department.

Asst. Graphic Designer / **media specialist** / **Photographer**, Student Hire – This person assists the art director in implementing the umbrella aesthesis for the project. They are in charge of creating documents and media necessary for the project, including photography. This person may come from the fine arts or film studies department.

Instructional Developer / **Content Expert** / **SME** (Unit Directors), OIP Staff – These people are the content experts within the OIP staff and will work with all team members to communicate and codify the knowledge needed for the instruction.

Evaluation Specialist / **Test Developer**, Student Hire – This person will be in charge of summative evaluation and will collaborate with the instructional designers to develop formative and student assessment instruments. This person may come for the MIT program.

First round instructor, OIP staff – This person will teach the first round of instruction and perform formative evaluation tests of the entire project.

Appendix 3: Budget

HUMAN RESOURCES	WORKERS	HOURLY WAGE	TOTAL HOURS	ACTUAL EXPENSE
Lead Instructional Designer	Student Hire	12	187	2805
Asst. Instructional Designer	Student Hire	12	150	1800
Lead Project Manager	OIP staff	25		
Asst. Project Manager - Administrative assistant	OIP staff	25		
Editor/Writer	Student Hire	12	60	120
Art Director / Graphic Designer	Student Hire	12	5	60
Asst. Graphic Designer / media specialist / Photographer	Student Hire	15	8	90
Instructional Developer / Content Expert / SME (Unit Directors)	OIP Staff	25		
First round instructor	OIP staff	25		
Training specialist		35	30	1050
Evaluation specialist		50	60	**3000**
TOTAL payroll expenditures				**8925**

Workshop Expenses	Unit cost	Quantity		
Lunch catering	5.00	30		150

| **TOTAL EXPENSES** | | | | **10075** |

*'Student hire' refers to graduate and undergraduate students willing to work on the project at low or no costs or as part of course work. The OIP staff will be responsible for the project management and SME positions because of timeframe and budget limitations.

Appendix 4: 'The instructor Guide'

Front End Material:

- Table of contents-

- "How to use this guide" section-

- Content and instructional procedures overview-

- Logistics section-

    o Materials and equipment list

    o Preparation guidance

- Glossary

- Bibliography

Presentation Guidance: Prepared for each of the five daily workshops, this section includes:

- Objectives for the lesson

- List of all equipment, materials and supplies that must be prepared by the instructor

- A detailed presentation description and instructions

- Answer keys and evaluation matrix

- Estimated timeframe for the lessons and it's parts

Reference:

- Copy of the student guide

- Copies of all student materials

- Reference sources