

NC State University Office of Human Resources 2007

QuickStart:

Orienting Administrative Staff to University Business Practices

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Abstract

Campus departments depend on knowledgeable support staff to understand and navigate the administrative processes at the institution -- from purchasing, travel, and facilities requests; to HR/payroll actions; to budgeting, accounting, and IT system transactions. When a 'right-hand' person leaves, as one academic department chair says, "We're dead in the water. Even if I can hire someone immediately, I have no idea how this stuff works behind the scenes. That's why I need a department admin! I can't train them, so I just throw them in the deep end and pray they can swim. They have to learn the hard way."

When there's no "administrative mentor" for a new staff person (or new manager) to turn to, wouldn't it be great if someone could orient your newcomer to the wide variety of operational tasks specific to your institution's environment? Someone to cover all the basics on how to process requisitions, reserve rooms, manage email accounts, and process an FTE change? Someone to decipher the weird campus acronyms (like FTE), answer the stupid questions, and provide a toolkit of useful campus resources and references?

That frustrated department head was the inspiration for NC State's QuickStart training program, an introduction to University business practices for new administrative support staff – and for new administrators themselves. QuickStart not only helps participants hit the ground running on critical institutional procedures, it creates a cohort of campus colleagues; it connects participants to essential offices and content experts across the institution; and it points participants to subsequent training opportunities that offer more in-depth content applicable to their particular roles and responsibilities.

Although QuickStart is targeted for individuals in new administrative roles, even seasoned participants say they gained many useful new tips and resources. If "you don't know what you don't know" about NC State, QuickStart is a great beginning.

Introduction of the Organization

NC State is the largest university in North Carolina, with more than 30,000 students and 7,000 employees, including 1,800 faculty members. NC State is a public, land-grant institution founded in 1887, with historic strengths in the sciences, engineering, technology, and agriculture. The main campus is in the state capital of Raleigh, with operations in all 100 NC counties and the Cherokee reservation, as well as other 35 other states and several countries. NC State provides top-tier education in the humanities and social sciences, design, education, life sciences, management, natural resources, physical and mathematical sciences, textiles and veterinary medicine. The University offers bachelors and master's degrees in more than 110 fields, and doctoral degrees in 61 fields, as well as the professional DVM degree.

NC State's Office of Finance and Business comprises the areas of budget, treasurer, financial services, facilities management, human resources, environmental health & public safety, administrative computing, and auxiliary enterprises such as parking/transportation and bookstore operations.

Statement (restatement) of the Problem/Initiative

University administrators lacked an efficient and effective way to ensure that new employees gained immediate working knowledge of the essential university business practices needed in their positions.

Using an 80/20 paradigm (employees can accomplish 80% of recurring activities using a core 20% of required knowledge), Human Resources conceived a novel orientation program to introduce many fundamental business practices – the basic things you need to

know to accomplish the most common business activities of the university – such as purchasing, human resources actions, university budgeting and accounting procedures, laws and policies specific to this workplace, campus IT systems and processes, facilities activities, campus safety, and other business procedures.

Design

HR's Training and Organizational Development (T&OD) department utilized the ADDIE model of instructional systems design in building QuickStart (Assessment, Design and Development, Implementation, and Evaluation).

Design Steps Included:

- ◇ Focus groups (3) open to faculty and staff
- ◇ Identification of optimal potential content areas
- ◇ Design of project timeline
- ◇ Identification of program modules
- ◇ Identification of best content owners/facilitators from relevant units
- ◇ Meetings with senior university leadership to secure buy-in and commitment
- ◇ Distribution of draft content outline
- ◇ Partnering of divisional Subject Matter Experts (SMEs) with T&OD staff members to ensure consistent instructional design and presentation of content
- ◇ Review of program intent, design, project plan, and timelines with content owners
- ◇ Creation of logistic tools in support of project, including a shared directory to electronically access materials under development, session outlines, and presentation templates
- ◇ Meetings with content owners/facilitators to review expectations
- ◇ Determine the training time required (= Four 6-hour days, 1 day/wk for a month)
- ◇ Build pilot training schedule (= Offer every month as long as demand warrants)
- ◇ Conduct 'table reading' of proposed content with presenters to ensure they were on-track
- ◇ Conduct "Train-the-Trainer" sessions for individuals who would be delivering the content for their area
- ◇ Revise content, based on working-group and T&OD feedback
- ◇ Market QuickStart concept to the university to build anticipation & support
- ◇ Conduct pilot "dress rehearsal" with volunteer campus participants
- ◇ From pilot, review successes and enhancement opportunities
- ◇ Make final revisions to content and schedule
- ◇ Program Roll-Out
- ◇ Evaluate program at end of each module (4-6 modules per day across 4 days)

- ◇ Report evaluation feedback to content owners and facilitators
- ◇ Hold quarterly facilitator meetings to review content, facilitator role, and impact
- ◇ Use cumulative feedback to evaluate program effectiveness and enhancements over time

QuickStart Modules

Content areas were identified and organized based on focus group feedback and included:

DAY ONE
Welcome & Program Overview
University History, Organizational Structures
Training & Organizational Development Services
Benefits Essentials
Payroll Processing
HR Information Systems & Personnel Records
DAY TWO
Academic & Administrative IT Services
Facilities Management & Services
Employee Relations Services
Legal and Policy Overview
Equal Opportunity/Affirmative Action & Diversity
DAY THREE
Accounting Transactions
Budget Management
Contract & Grants Administration
Foundation Investments & Accounting / Endowment
Purchasing & Travel Processes
Graphics, Printing & Copy Services
Internal Audit
DAY FOUR
Classification & Compensation /State Personnel System
Employment Services / Temp & International Employment
Transportation, Parking & Motor Fleet Services
Environmental Health & Safety / Public Safety

Implementation

Gaining Presenter Commitment

The Training & Organizational Development team knew that corralling the wide variety of topics and content areas into a unified, logical program would require extensive cooperation and active involvement from “subject matter experts” all over campus – not

only in program design, but also in content delivery. Likely organizations were identified during the preliminary program assessment, and twenty-two key campus units were invited to participate in the program.

The catch was that units couldn't just submit content and expect T&OD trainers to conduct all the platform delivery. Inherent in the value of such a program was the recognition that newcomers (a) should be exposed directly to, and learn directly from, the first-hand content experts in each area who would be able to answer specific questions; and (b) should be able to connect names, faces, and institutional responsibilities to establish effective work relationships for the future. That meant T&OD had to convince 22 administrative departments to commit some of their busiest, most valuable professionals to an ongoing obligation of at least a couple hours every month.

One major barrier -- departmental willingness to redirect resources to this program -- was circumvented by gaining senior leaders' buy-in and sponsorship of the QuickStart initiative, particularly that of the Vice Chancellor for Finance & Business, who urged all his divisions to make a commitment of time and staff to the program.

Facilitated by the T&OD professional staff, the QuickStart program was a collaborative effort that engaged the University's entire Finance and Business realm, as well as a number of other campus divisions.

Building Presenter Skills: From the Back Office to the Front Line

Just because professionals know their specialty areas backward and forward doesn't mean they're naturals at training others in that content. In fact, cognitive research shows that the more expert someone is at an activity, the less able they are to articulate to others how they do it (the Zen state of "unconsciously aware"). So T&OD had to be prepared to train these content experts to deliver their content in "plain English;" to focus on the main ideas and not get bogged in obscure details; and to avoid their customary insider code terminology. T&OD had to help sometimes back-office professionals become front-line, stand-up trainers. T&OD was very interactive in assisting presenters with the development of their program materials and with coaching on presentation skills.

Keeping Materials Current

By the time participants complete the program they have a notebook full of training materials and handouts from each content module to use as a handy future reference manual and resource guide. Because the materials include lots of specifics (names, phone numbers, policy references, website urls), each module's presentation materials were subject to frequent updates. So keeping hard-copy materials current from month to month posed another project challenge. Instead, a shared IT file directory was created, which facilitators update on a weekly basis. Then presentation slides and handouts are printed "just-in-time" -- the morning of each session -- and no hard-copy inventory is maintained.

Ongoing Challenges

QuickStart is in its sixth month post-rollout. One continuing challenge is time management for the module presenters as the training day progresses, because participants' interests, questions, and interaction levels vary. So facilitators are still mastering how to be responsive to their students *and* to stay on schedule so as not to delay the next presenter.

Another challenge has been that, given the size of the University and the success of the program, available slots fill up and not all interested new hires have been able to enroll in the program as immediately as their departments would like. Once the backlog of interested existing employees has cycled through the program, it should be able to keep pace with new-hire volume each month.

Perhaps unique to this campus, reserving permanent space to conduct training on an ongoing monthly basis has been a challenge, although it may be relieved somewhat with an HR building renovation that will provide T&OD additional priority training room access.

Benefits

QuickStart provides departments a resource that enables their new employees to become valuable contributors in a much more efficient and effective manner than the “toss ‘em in the deep end” model. The recurring monthly cycle allows departments to quickly expose and train new hires on basic business practices of the University. It reduces time spent searching for answers, as well as novice errors and rework. This orientation to the

University increases employee confidence and job satisfaction, it reduces job stress, and it supports the message that the institution is interested in the welfare and success of its employees from ‘day one.’ Plus, once they’ve completed all 4 of the day-long sessions, participants receive an official Certificate of Completion to display in their offices.

The QuickStart program benefits not only new hires and their departments, but has also proved beneficial to seasoned employees seeking a skill refresher or overview of processes new to the university.

Feedback from Participants

In post-training evaluations, 100 % of participants have indicated they would recommend this program to a coworker. Participants have voiced success by stating:

“It is very informative and should be taken by all employees. Having been with the university for 17 years, there was a lot of information that was given that a lot of the university employees do not know.”

“The information I received from this program was invaluable. I know it will help me to do my job better.”

“I have bragged about QuickStart to all of my co-workers! What a great tool this class is. I would recommend this class to ANYONE who works on campus. Very clear, concise, well put together program.”

“It was a wonderful and very informative program. I would highly recommend that all new employees be required to attend the QS classes. I have 18 years of service and learned many things that I did not previously know.”

“The QuickStart Program is a very good program; one that I am very proud to have participated in. I would definitely recommend this program to a coworker. Thank you.”

Benefits to the Presenters & Contributing Units

In addition to the benefits received by program participants, the presenters and their co-workers in the administrative content areas acknowledge that, by investing this time early on, they themselves actually benefit – they receive reduced customer errors and fewer requests for individual assistance – thus making their own work environments more efficient.

Further, the continuously recurring modules prompt presenting units to keep their policy and procedure materials updated in a timely fashion. And it's not an expensive program to offer. No outside expertise was required to develop or maintain the program.

In fact, we've yet to identify a substantive downside to the initiative.

Retrospect

While each presenting unit had offered, and continues to offer, other in-depth training in its own areas of interest, it took strategic, cross-functional insight to envision a collaborative effort that cherry-picks the basic highlights from each realm and presents an appetizer 'sampler' course to new employees. In retrospect, program managers and facilitators agree that the program is long overdue: "This seems so obvious! Why didn't anyone think of it before?"

For other institutions contemplating such a program, the single biggest success factor would be, in our view, the commitment of senior institutional leaders (particularly in the

Finance/Business/Administration realms) to encourage their units to dedicate professional staff time and talent on an ongoing basis.

While we'd be happy to share our NC State design and delivery models, the true value of such a program is in its specificity to any university's own policies, procedures, and paradigms. Our program has been worth every penny and every minute... returning dollars and days in effectiveness and efficiency. Sure, you could hire people and make them begin slogging through your all your policy and procedures manuals – or maybe instead you could just give them a QuickStart.