

ALUMNI/DEVELOPMENT DATABASE SYSTEM - POST IMPLEMENTATION TRAINING PLAN

TRAINING 101:

Def. 1: the act, process, of one who trains 2: the state of being trained.

- Prepare – a good training program should reflect the needs of end-users as well as the needs of the IT staff
- Why – training is the one area where the IT staff can collaboratively work with the entire Advancement organization to set up global expectations and standards for the database, as well as communicate why decisions were made.
- Tool – both for insuring quality control, and for setting minimum standards for staff.
- Control – a good training program serves as a control point for the IT staff. If end-users are self-sufficient, that means your staff will have more time to dedicate to their primary job functions.

NOTE:

I think the biggest stumbling block to implementing new ideas is time – when you get back from the conference you are already behind and have to play catch up for a week. By that time, you have lost some enthusiasm for the new ideas you picked up. One thing that works for me is making a list of new ideas on a separate sheet of paper from all the other stuff I get at the conference, and then posting it in a visible place at my desk. I have been able to at least start on 2 things on my list!! One is accomplished and one is in the works.

SETTING UP THE TRAINING PROGRAM

Who? – What? – Where? – When? – Why? – How?

Steps:

1. IDENTIFY WHAT TO TRAIN AND WHY

- What does your end user staff need to know?
- How did/do they use your legacy ADDS?
- How is your system compartmentalized?
- Document the courses (see yellow sheet)
- Build a matrix (see AAR Training Courses sheet)

2. IDENTIFY WHO TO TRAIN

- How is your advancement division segmented?
- Are their key staff in each department who can be trained to a higher level of proficiency and act as “resources” for their staffs?
- Self-sufficiency vs. spoon feeding
- Are some functions related to position?

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3. IDENTIFY WHOM WILL TRAIN

- Identify a trainer's trainer (human resources?). make that person your Training Manager.
- Training Manager Requirements:
 1. Technically competent
 2. Able to communicate effectively
 3. Respected by peers
- Training Manger Responsibilities:
 1. Prepare and oversee curriculum
 2. Edit procedures/handouts
 3. Create training calendar
 4. Functionally manage staff
- Staff who are primarily responsible for the data should be tapped to conduct training. It is a professional development exercise and offers an opportunity for the staff to "bump" themselves up a level in the organization.

4. PREPARE DOCUMENTATION

- The training manager should prepare a syllabus for the specific class and review it with the trainer (see sample syllabus)
- The trainer and training manager should prepare, edit and test the documentation for the class.

5. CONDUCT CLASS

- The trainer should conduct test runs of the class with eh training manager as the audience (work out the kinks here).
- Provide students with a feedback response device (form, SurveyMonkey, etc...) , to ascertain curriculum, trainer and other issues to be addressed.
- The training manager should provide performance reviews for the trainer (or at least participate in the review cycle – if the manager only has functional management responsibility).

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Introduction to Reporting Techniques Class Syllabus

General Description:

This course covers the basic skills necessary for creating a "Saved List" using values, dictionaries, and formulas. The course is designed to provide the need user a degree of self-sufficiency for preparing lists of people from the Alumni/Development Database System (ADDs). The class will also cover enhancing, downloading, saving, orienting, graphing and sorting the data files using canned system reports.

Objectives:

Participants will be able to:

1. Understand information fields stored in the ADDs person file.
2. Construct basic person file query statements via the database's query tool on demand, and amend if necessary
3. Save and recall these query statements for later use

Audience:

Any ADDs users or users with who want to learn efficient procedures for creating and manipulating data records in the system

Prerequisite:

- Introduction to ADDs
- ADDs Biographic Inquiry
- ADDs Gift and Pledge Inquiry (recommended)

Workshop Specifics:

- Duration : 2 hours
- Location: Multi-Media Conference Room (SFL-328)
- Instructor: Anka Pruszynska-Garcia, AIS Training Manager

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Advancement & Alumni Relations ADDS Training Courses

	Advancement Services	Alumni Association	Advancement Communications & Events	Development (ADR, EAP, OFR, & OPG)	External Offices	AAR Support Staff	President's Office	Instructor(s)
Introduction to ADDS	X	X	X	X	X		X	Online/Self-Study
Biographic Inquiry (I)	X	X	X	X	X		X	Pruszynska-Garcia
Gift and Pledge Inquiry (I)	X	X		X			X	Meneses
Activities & Events (M)	X					X		Haylock
Correspondence Control (M)	X					X		Haylock
Prospect Management (M)	X			X		X	X	Boyle
Introduction to Reporting techniques	X	X	X	X		X		Pruszynska-Garcia
Advanced Reporting Techniques	X	(Recommended)	(Recommended)	(Recommended)		(Recommended)	(Recommended)	Hanson