W&M Training & Development Advisory Committee
December 9, 2009
MINUTES (RED ARE ACTION ITEMS)

NEXT MEETING
March 24, 2-4pm
Miller Hall – Room 2023


ACTION ITEMS

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<th>2010 Committee Meeting Dates &amp; Locations</th>
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<td>• March 24, 2-4 pm – Miller Hall, Room 2023</td>
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<td>• May 19, 2-4 pm – Bell Building (new HR office)</td>
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#1 Training Needs Assessment Data

Discuss high level analysis to date
The committee reviewed the high level analysis provided by Susan in the read ahead materials. In addition, Susan reviewed the overall training report including the following facts:
- 513 people completed the survey. Of that 513, the respondents reported their function at the College to be:
  - Executive 4%
  - Teaching 7%
  - Researcher 10%
  - Program Manager 13%
  - Administrative 41%
  - Technical 7%
  - Other 6%
- 78% work on the Williamsburg campus area and 20% at VIMS – the balance out of the area
- Most respondents are full-time 91% versus part-time 9%
- 49% of the respondents are NOT supervisors, 51% have supervisory responsibilities
- The baseline collection of how people feel about training (6 questions) should that 74-88% report usually or sometimes (versus seldom) in response to the questions
- Learning style preference – 45-55% prefer classroom/instructor led and one-on-one; 25-33% prefer online and self-guided
High Level Analysis Results - Five (5) categories rose to the top with specific topics within category ranking a priority:

**Professional and Professional Development**
- Planning & Organizing to Stay on Track
- Organizing Your Work: Time Management A-Z
- Problem Solving
- Negotiating for Win-Win
- Achieving Results

**Financial Management**
- Budget Management
- Budget Tracking and Reporting
- Travel Regulations, Approvals and Reimbursements
- W&M Budget Process and Cycle
- Procurement – General Purchasing Policies, Principles & Tips

**Information Technology**
- Banner Financial
- Project Management Software
- Discoverer – Banner Reports
- MS Excel
- MS PowerPoint

**Communication**
- Difficult Conversations
- Presentation Techniques
- Public Speaking
- Business Writing & Proofreading

**Leadership**
- Leadership Skills
- Team Building – How to Build & Maintain a Team
- Project Management
- Conducting Productive Meetings
- Business Process Improvement
- Succession Planning: Planning for Changes in Leadership

**Leadership Skills**
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In reviewing the topics that fall under categories that were NOT reported as a high priority – patterns of need can be seen based on the number who responded they needed the topic. A quick look at those topics...

**Administrative Professional Development**
- Who am I? Department Overview
- Who do I call? (Where do you get help when you need it?)
- Planning for a New Hire: Phone, Furniture, Supplies, IT and MORE!

**Health & Safety Professional Development**
- CPR/First Aid
- Ergonomics
- Stress Management
- Wellness: Exercise & Healthy Habits

**Benefits Professional Development**
- Benefits Overview
- Health Insurance and Flex Reimbursement Accounts
- Retirement 101 – Understanding your VRS
- Retirement 102 – Understanding your ORP
- Saving Opportunities – Cash Match & You!

**Sustainability Professional Development**
- Greening of Your Office
- Sustainability at W&M
- What Can You Do to Help?

**Supervisory Professional Development**
- Coaching & Mentoring
- Employee Motivation
- Performance Management: Best Practices
- Working with Difficult Conversations

**Diversity Professional Development**
- Cross-cultural Communications
- Intergenerational Differences
- Who Attends W&M? Understanding our Students
- Who Works at W&M? Understanding our Employees
- Respect in the Workplace
**Discuss next steps analysis**

1. A graduate student from the School of Business has offered to analyze the data over the winter break. Susan will meet with the student prior to the break and set a goal for when the student should have an analysis completed.

2. The raw data needs to be analyzed and responses that should be combined into one of the forced choice responses moved. Based on this a new bar/pie chart report should be developed for posting to the website.

3. Questions that still need answers:
   - Using ranking methodology, what are the differences in category/topic responses based on FT/PT?
   - Using ranking methodology, what are the differences in category/topic responses based on Supervisor/Non-Supervisor?
   - Using ranking methodology, what are the differences in learning style preferences based on Function and Location?
   - Are there patterns of “other” responses to any question that would change the data interpretation? Add a new topic to a category? Add a new category?
   - When analyzing the responses to the last three open questions, 1) what percentage of the total actually responded to the one or all three of the open questions, 2) under each open question how can those responses be categorized/grouped?
   - Using percentage of responses methodology – order the category priorities and topical priorities. Based on total percentage, do the categories change? Change priority order? What are the categories, in order, below the “top 5”?
   - Using total percentage of responses methodology – examine the topics under each category. Are their topics that rise to the surface based on total responses that should be prioritized for development/delivery? For examples – what topics have the MOST responses regardless of categories? What is the priority order list of topics based purely on total percentage (list topic and category)?

**In addition** to the list of questions to be answered (above) the committee would like to know how the respondents break down for the topics above (i.e. who predominantly wanted these topics and where are they located).

**Discuss method(s) for distributing the information to employees**

The committee has a lengthy discussion about many aspects of how to distribute this information. The minutes summarize the decisions made by the committee:

1. Finalized data analysis and develop two reports a) data analysis methodology and results and b) 2010-2011 training plan.

2. Develop a presentation. This presentation should include information on the demographics (who responded, how the data was analyzed) as well as information on how the courses will be delivered (instructor led first priority followed by webinar and development of online courses), length of courses (2 hours), coordination of courses across campus delivery entities and timing of course offerings (avoid beginning and end of semesters; offer different times of days and days of the week, offer on both W’burg and VIMS campuses), emphasis should be placed on employee and supervisor planning employee development (how many classes in a year is realistic, balancing required versus growth training).

3. Provide presentation and training plan to HR leadership for review then present to Provost/President to obtain input and support with Deans/Department Chair for employee release and faculty/graduate student instructor time to count as community service requirement.

4. Once presentation materials and training plan for finalized, offer open forums on both campuses for employees to attend and ask questions. Publish the materials on the website and announce release
Presentation must be sensitive to the fact that people will want to know how they will have time for training when they are covering workloads for people who have been laid off or why training is supported during a time of no raises.

Discuss method(s) for recruiting instructors
While not discussed extensively, the general plan is to:
1. Identify W&M courses that mirror needed content and/or identify the W&M department that has the business owners for needed content
2. Recruit targeted individual to include faculty, adjunct faculty, graduate students, Professional and Operational employees
3. Provided benefit to instructors to include presentation skills training, research/presentational material development, logistics support, community service credit (to be negotiated with Provost) and letter to supervisor regarding contribution and class evaluation. Note that at this time no funds are available to pay for instructors.

#2 WM Knowledge Center Discussion/Decision Points
- Branding our site –
  - T.L.C – The Learning Center; Tribe Learning Center; Learning Center
  - Graphics selected by Communications
  - Class suffix – W&M-VIMS or WM-VIMS (depends on if IT system will take the & sign)
- Hiding functions & domain topics – Committee agreed to hide Career Center & Conference Center as well as to hide domain topics that have no content. All hidden features can be turned on when/if needed.
- Hierarchy – Committee decided to leave organization flat for site administration purposes. Departments will be trained to use the team rooms for department only functions. Susan will develop team room instructions and provide training to the team room administrators as needed.
- Discuss rollout plan and finalize – With above decisions made Susan will complete the implementation plan.

#3 Ambassador Program
The committee discussed the proposal circulated earlier in the week. After a good discussion the input to program design and rollout revisions included:
1. Enhance the information on the selection of the Ambassadors to include targeting high achievers or employees who would perceive being nominated as an Ambassador a perk
2. Include participation as an Ambassador an element to include in an employee development plan
3. Include a benefit to the Ambassador to include receiving a letter of commendation sent to the supervisor after the Ambassador completes a pairing

To be done –
- Committee members have until 12/18 to submit additional comments
- Susan to finalize proposal, handbook and program management guide
- Susan to present to Provost (in order to obtain support from Deans, Dept. Chair and Faculty to release Prof and Operational employees to serve as Ambassadors)