HISTORY AND BACKGROUND

Training Programs

In the beginning…

In 1977, it was proposed that a training unit be established within University Administration to promote efficient and uniform transmission of policies and procedures to administrative staff. This unit operated within the Office of Business Policy, and the first manager of this area, Ms. Ann Booker, reported to the Office of the Vice President for Administration.

In 1978, a series of administrative manuals were written and the Administrative Training Program was designed. In 1979, a pilot series was conducted, covering the purchasing, accounts payable, equipment, payroll and expenditure accounting systems. In 1981, the program was expanded from six to sixteen courses and administrative guides were introduced.

In 1983, the Office of Business Policy was split into two areas, Personnel Programs and Business Affairs. The training unit was assigned to Personnel Programs with the understanding that the program would serve both offices.

Over the next several years, the training unit conducted needs assessments, evaluated other programs, and submitted a series of reports identifying areas where training needs existed. Among these needs were secretarial training, supervisory training and management development.

In 1987, a Staff Training and Development Program was created to meet some of the work-related needs of faculty and staff. It was offered through the School of Continuing Studies (SCS), using staff development remission to fund the costs. Since that time, the program has grown from four courses to a much broader program in both depth and variety.

In 1991, the Administrative Computing Program was developed as a companion program to the Administrative Training Program. This program provided hands-on computer training in the electronic forms and systems. It was offered through the Center for Training and Education by the Office of Administrative Computing in the Office of the Vice President for Business Affairs.

The Career Management Program

In 1992, the Career Management Program was established. This program was offered through the School of Continuing Studies, at the Downtown Center. During 1995, SCS notified the Career Management Program that it would like to reconsider its past role in providing that program. This prompted a decision to change the funding of Career Management from a service account funded
through staff development remission to a special project line item in the benefits budget. This freed Career Management to focus less on marketing courses and more on providing career and group counseling services. Currently, a variety of courses are offered as well as individual testing, information and library services along with individual counseling. This program is currently administered through another office and their activity is reported separately.

The GED Program

In 1992, a GED Program was established in cooperation with The Johns Hopkins Hospital. Courses were offered through the Community College of Baltimore. The Hospital Human Resources Department discontinued the program in 1993.

New and Changing Leadership

In July 1993, the Office of Training and Education was expanded and a director, Dr. Ralph Jenkins, was hired. This new position was designed to lead a planned effort to improve organizational units, and the people who comprise them, through the use of internal consultation and structured activities.

During 1994, the addition of a position for a Manager of Management and Staff Development (MSD) led to a broader offering of management and staff development courses, more specific to the Hopkins environment. This person also was to serve as a liaison to SCS and oversee the Business and Management Program courses they provided. However, the decision of SCS to discontinue its relationship with T&E led to the development of the Management and Staff Development Program. In 1995, with the retirement of Dr. Ralph Jenkins, Dr. Linda Dillon Jones, who had been hired the year before to manage the MSD program, became the center director.

The CUFS Financial System

Concurrent with these changes, the new CUFS financial accounting system required a revision of the Administrative Policy Training Program. By the end of 1995, every training program the center offered was in the midst of, or completing, major curriculum restructuring and course revisions. As the CUFS roll out continued, the policy intensive, paper-based Administrative Policy Training Program found it necessary to consider new ways to better intertwine the paper-based policy content with the computer-based focus of the Administrative Computing Training Program. Coordinating these two sources of similar content became the primary goal of the year’s efforts. This was achieved by combining some courses and by coordinating the provision of others through team teaching. In 1997, the two programs were merged into one and renamed the Administrative Training Program.
The Education and Development Study Committee

Between 1994 and 1995, an Education and Development Study Committee made a serious study of all the programs housed within Training and Education. Many of the innovations accomplished since that time, were the result of recommendations offered by that group.

At its inception, the goal of the Management and Staff Development Program was to design a series of well-articulated courses that would meet the staff development needs of the university. In addition, while the Administrative Training Program had always been fiscally responsible, it needed to be proved that a broad Management and Staff Development Program would also be financially viable for the university. These goals were addressed by offering newly designed work-related courses. As a result of the new courses, staff participated so eagerly that a sizeable financial deficit was retired. Both goals then were achieved, creating a value for training activities among staff, and rendering training both cost effective and capable of long-term growth.

The Report on Administrative Training

In both the 1996 and 1997 Management Letter, The Johns Hopkins University’s external auditors, KPMG Peat Marwick, recommended that the university redesign and strengthen its Administrative Training Program. As a response to this recommendation, in 1997 the Vice President for Business Affairs and the Vice President for Human Resources commissioned a study to review the Administrative Training Program, consider and evaluate options, and make recommendations for the redesign of administrative training. Dr. Russell Morris, of the Controller’s Office, and Dr. Linda Dillon Jones, Director of the Center for Training and Education, were charged with leading the study. A number of individuals were surveyed or interviewed in the process of this study, and two task forces were formed, one made up of administrators, and one made up of members of divisional business offices. A report of this activity, *The Report on Administrative Training*, and the recommendations that it generated, was distributed during August of 1998. The recommendations presented in the report were primarily of a process nature, and the authors stated that in order for a redesign of administrative training to be successful there must be an articulation of the importance of the program from the highest levels of the university and an inclusive involvement in the design, delivery and measurement of training.

New Employee Orientation

In FY98, the Center for Training and Education hired a trainer responsible for the creation and delivery of a university-wide New Employee Orientation program. The goal of the orientation program was to provide new university staff members with a general overview of the history, structure, policies, and benefits in a uniform manner. In July 1997, the first monthly orientation session was held on
the Homewood campus. By October 1997, bimonthly sessions for the East Baltimore campus were added.

Expanding Resources

FY97-98 saw an expansion of Training and Education’s physical capacity with the identification and renovation of space at the 2024 East Monument Building on the East Baltimore campus, called the Center for Training and Education – East. This space contained a large lecture hall, and could be renovated to house two additional classrooms, one for use by T&E and another allocated for the Physicians Billing Service’s Computer Training classroom. An additional trainer office, reception area, supply room, and materials production area completed the facility. Further, an adjacent conference room was outfitted to be an Interactive Multimedia Learning Lab. A complete set of CD-ROM-based training materials are housed there along with a video library on management and supervisory training topics. In FY01, the Physician’s Billing Service moved to another location in the 2024 E. Monument Street building and the Financial and Information Technology Training (FITT) program [formerly the Administrative Training Program] began using the classroom.

Unprecedented Growth

This report provides brief historical data about the growth T&E has experienced across the last decade. Resources of all kinds have increased, and center staff has developed the ability to provide programs seamlessly across four facilities. As the demand for courses increases, and the number of details dealt with increase exponentially, it is difficult to maintain a high level of customer service and quality, yet T&E staff continue to do so everyday.

ATP Becomes FITT

Administrative Training Program staff had always been aware of the long wait lists that some participants had to endure before they could enroll in financial administrative training courses. This need was highlighted again in 1999, in the Report on Administrative Training. As a result, funds were identified for three new staff positions (an Associate Director and two instructors) assigned to financial administrative training.

With high quality programs in place, it is important to embed these courses, and the value for training, into the head and heart of the university. The Report on Administrative Training led to the design and development of the Financial Administrative Training area (FAT) and several important innovations:

- An Administrative Training Advisory Committee was created to serve in an advisory capacity to Audrey Smith, Vice President of Human Resources, and they appointed individuals to an Administrative
Training Work Group that was available to collaborate with the Associate Director of T&E.

- In 2000, a recommendation to create standard web-based courses for the most basic financial content proceeded nicely with five modules under development including the four modules in Introduction to Financial Administration: The University as a Business Organization; Basic Accounting Principles; Business Transactions; The JHU Chart of Accounts.

- FY00 saw training programs growing in both breadth and depth. The desire to encourage and create more solid collaboration between the Administrative Training Programs offered through Hopkins Information Technology Services, and the Center for Training and Education, led to an agreement between Audrey Smith, Vice President of Human Resources, and Stephanie Reel, Chief Information Officer, to structure Administrative Training under a matrix management approach, and staff began to work in earnest to make this a reality. The new program is referred to as the Financial and Information Technology Training program (FITT) and it includes the former Financial Administrative Training (FAT) program along with hardware, software, and mainframe training, which came to HITS when Homewood Academic Computing was closed.

- In December of 1998, Linda Dillon Jones contracted with the DACUM Resource Group of the Baltimore City Community Colleges to conduct a series of focus groups of administrators and managers to identify and discuss the attributes of the current training program as well as the areas where growth and revision were needed. In July of 1999, a former program administrator from the School of Engineering, Mike Alexander, was hired as Associate Director to oversee the program and immediately began working with Penny Jung, the facilitator from DACUM, in conducting functional analysis panels consisting of the outstanding financial administrators to identify the nine major subject areas of the financial process of the university.

A New Training Policy

This DACUM analysis of administrative functions and tasks was completed in 2000, just in time for the approval of the university’s Policy on Management and Staff Development. The policy states:

1. *Within two years of initial employment, it is expected that all new managers and supervisors will complete the JHU Supervisory Training Program established by the administration and conducted by Human*
Resources, the Department of Health and Safety and the General Counsel’s Office.

2. All staff with access to the university’s financial and administrative information systems must complete the appropriate modules of the Financial Administrative Training Program and maintain current knowledge of changes and systems as they occur.

3. All faculty, managers, and supervisors should insure that each non-bargaining unit staff member reporting to them has a minimum of three full days of training per year in areas of knowledge and skill relevant to their job duties and professional aspirations.

In response to this new policy, T&E staff has worked through HR and the Administrative Training Work Group to draft a list of recommended courses for each program area.

Co-habiting with OHS

In May 2001, both the Center for Training and Education (which had been located at 2715 North Charles Street) and the Technologies Learning Center created by the Administrative Training Program (which had been located at 2701 North Charles Street), moved to Johns Hopkins at Eastern. This move provided a continued opportunity to take advantage of the efficiencies of “co-location”. Not only does the additional space support the increased numbers of participants that the new training policy generated, but it provided a state-of-the-art facility that supports the variety of methods and needs that exist for all the training programs.

The Learning Management System (LMS)

By this time, the growth of all the center programs had rendered the paper and pencil registration system, a cumbersome, work-intensive relic. The decision was made to seek alternatives. Throughout 2001, Lisa Finnen from HITS assumed the role as project manager and made major strides in identifying the adjustments and changes required and worked tirelessly to install the Ingenium Registration System. This software program was purchased in June 2000 to be shared by the following programs in the Office of Human Services:

- The Center for Training and Education – for Financial and Information Technology Training programs, Management and Staff Development Program, and the New Employee Orientation program.
- Career Management Program – for course registration and tracking confidential information.
- Worklife Program – for courses and tracking confidential information.
Each of the above programs was asked to identify and define deliverables along with a list of customizations that would be required. As the project moved forward, the working group of representatives from each of the above offices met to discuss such items as importation of data from the current Paradox database to Ingenium, the capabilities of the system, and a time line of events that included training for the administrators identified to support the administration of each program system. Much attention has been paid to the various details required by each program. In this effort, Lisa addressed the most specific information including how web course registration would be coordinated through Ingenium, as well as special registration situations that would arise in each program. Ingenium became the registration system in use across OHS in September 2001. In 2002 the company changed the name of this system to Aspen, and it is now referred to across OHS by that name.

The DACUM Process Continues

In 2001, the DACUM Resource Center Project continued and focused on the redesign of Financial Administrative Training at Hopkins. Core content from nine subject areas was identified and with the assistance of selected financial administrators and managers, five panels were formed to design and develop curriculum plans for the following content areas: Budget/Account Management, Cash Accounting, Payroll, Procurement, and Sponsored Projects. Each panel met for a full day (in some instances two or three full days) to discuss how the core content and financial procedures would be taught in sequential order. As a result, a total of 41 courses were proposed by the panels and presented to the Administrative Training Work Group for review and approval. Since the course format varied for each subject area, the recommendations from each panel included a redesign of current courses to include both web-based as well as instructor-led training. After the Work Group endorsed the plan, it was diagramed on a Financial Administrative Training Plan Program Sequence chart that was circulated to the Administrative Training Advisory Committee.

After forming the Program Sequence and finalizing the five curriculum plans, Mike Alexander, Associate Director of T&E, formed a partnership with the Office of Compensation to support the identification of job families and job clusters. The generic job descriptions currently made available from the Office of Compensation, Mike and Penny Jung were able to design training profile guides for the Financial and Office, Clerical Job Families using the duties, responsibilities, knowledge, skills, and abilities identified in each job description. After completing that phase of the project, Mike and Penny were able to conduct two training identification profile activities in the Krieger School of Arts and Sciences and the Peabody Institute. Divisional business officers, human resources managers, and selected administrators and members of their staffs attended a half-day session in each division that was designed to identify the
training requirements for each position. In addition to required training, specialized courses as well as courses that would enhance performance were also identified for each position pending the approval of the supervisor and human resources manager. Each of these activities were successful in presenting a proposed training plan which allowed flexibility for each person to recognize training for their position as well as build a personal training profile which would open the possibilities for growth and advancement. The IT portion of the DACUM process proceeded under the direction of Tina Cole, and was completed in March of 2003.

E-Learning

During 1999 and 2000, the development of six web-based training courses became one of the major priorities of the Financial and Information Technology Training Programs. Working closely with representatives from LearnWare International Corporation, a team of four subject experts served as the sub-group for web course development. Barbara Warren and Maxine Given of the Controller’s Office and Mike Alexander and L. Hunter Alfriend of the Center for Training and Education, met on a regular basis to compose and edit storyboard scripts and design web-based training using the information and materials identified in the DACUM Resource Center Project. Currently, five web courses have been successfully produced. The first four courses comprise the workshop entitled “Introduction to Financial Administration” and were released to the Hopkins community in September 2001. Each course contains specific content relevant to the business practices of the university, along with practice quizzes and knowledge assessments containing questions based upon the course subject matter. After successful completion of each assessment, the participant can log on to the next course until completing the workshop and eventually receive a certificate of completion for the workshop. In 2003 the original contract with LearnWare Corporation to support the design and development of e-learning expired, and a search for a new vendor was completed. The contract was eventually given to General Physics, and work has begun on a series of workshops related to Sponsored Projects.

New Programs for Management and Staff Development

In FY01, three new programs were added to the overall MSD program: JHU Supervisory Training, Certified Professional Manager, and GED/Adult Education Programs:

- The Supervisory Training Program was developed in response to the new training policy. Target participants include newly hired or promoted managers and supervisors identified by the divisional human resources offices. The training program is comprised of 8 courses that can be completed over a period of 9 days. These include: Success for Supervisors, Basic Supervision, Employment Law for Supervisors (in a

- The Certified Professional Managers Training Program was created in the spring of 2001. Course materials developed by the Institute of Certified Professional Managers (ICPM) at James Madison University in Harrisburg, Pennsylvania, are used in the program. There are three, three-day training modules that must be completed by program participants: Personal Skills for the Manager, Interpersonal Skills for the Manager, and Administrative Skills for the Manager. At the completion of this program, participants may elect to take the Institute’s Certification exam.

Settling In

FY02 was a year of continued growth for T&E. The Center completed its first full year at its new location at Johns Hopkins at Eastern. All equipment and facilities adjustments were completed, and the general belief was that the new location did a great deal to improve the quality of instruction, and the convenience to participants. In January of 2002, the matrix reporting relationship which had existed in the FITT areas was dissolved, and all FITT staff, including those with IT backgrounds, began to report directly to Mike Alexander, who had a direct line reporting relationship to Audrey Smith. Later that year, Mike accepted a position in the Provost’s Office for University Projects Administration, and Kevin Kobylski was hired to take over leadership of the FITT area. At the same time, the reporting relationship for the Associate Director position changed to one of a direct line to the Director of Training and Education and a dotted line to the Vice President of Human Resources.

In the MSD area, participation in both the Supervisory Certificate and the Certified Professional Manager’s training programs continued to increase. Further, the JHM Leadership Program requested and scheduled the first ever offsite FOUNDATIONS course as a part of the JHM Leadership Development Program. As a result, the Leadership Development Service Account was created to support the work of ODD staff that participates in providing the two LDP programs.

The Cross Institutional Training Policy

On July 1, 2003 (to be effective for FY 04), the vice presidents of Human Resources for the university and hospital, Audrey Smith and Pamela Paulk, approved a policy that would allow these two institutions to "trade" training. For several years, issues had been raised about how to best support the offerings of the two training programs when one institution offered an event, and employees
of the other institution wanted to attend. In the recent past, T&E had begun to receive payment from hospital employees to attend catalog courses, but there were many occasions when a departmental group of 20 people might have two or three hospital employees that they would like to include in an activity. One example of this situation was the shared Leadership Development initiative with JHM in which both Health System staff and University faculty and staff participate. In this program, Toby Gordon’s office at JHM accepted the responsibility to provide 9 two-hour sessions, and the university provided three additional days of leadership “retreats” which contain the exact same content as the university’s three-day Leadership FOUNDATIONS “course”. Custom Service Excellence training classes provided by the hospital were another situation where participants might be employees of both institutions.

The service account structure in use at the University will not allow JHU to accept any individual from any other Hopkins institution as an unpaying "guest" in its courses. In every instance, any outside person who wishes to attend T&E’s training must pay the going rate which is being charged staff development remission for JHU employees. The department of Organization Development and Training at the Johns Hopkins Hospital is under no such constraint, and does not compute a daily course rate for its program. The JHH Organizational Development and Training has historically not discriminated against JHU employees attending JHH custom programs for their departments.

This new policy proposed that:

1. Assessment: During the assessment phase of departmental custom training design, the training professional should determine which institution the majority of participants are from, and make a referral so that the institution of the majority "owns" the training event. If the OD or training effort is primarily for employees of the other institution, the practitioner should call a counterpart from the other institution to make a project referral.

2. Account/Pay For Attendance by Employees from Other Institution: Ongoing discussions with Jerry Bridges, of the JHU Controller’s Office, and Frank Kellner, Director of Benefits, led to the conclusion that the easiest accounting mechanism to manage this situation was to set aside a small amount of funds on which both programs can draw to pay the cost necessary to fund this training. Since the university does compute a daily course rate, and since this issue is a point of compliance with federal regulation for the University, it was agreed that the JHU course rate be used as the standard for both programs. It was agreed that each institution should identify a minimum of $15,000 in available funds to cover potential charges. JHU’s portion of this commitment should be paid with General Funds.
The intention of this new policy was not to fund individual participation in catalog courses, but rather to fund the participation of individuals who attend departmental group training. The policy was not meant to fund OD interventions or custom training that is not based on a catalog course. A bi-annual review of expenditures will be conducted by the Director of Training on the university side, and Director of Organization Development and Training on the hospital side, to monitor the success of this program and to reconcile spending so that the institution running a larger total cost can reimburse the other for the difference in spending.

The Enterprise Resource Plan

FY03 saw the initial discussion of the purchase of an Enterprise Resource Plan (ERP) to govern the financial work of all the Hopkins enterprise. Kevin Kobylski, the Associate Director of FITT, began to take a leadership role during the planning phase for the purchase, and began to strategize an appropriate role for the FITT team in the ERP roll out. In March of 2004, Kevin left Training and Education to become the Director of Training for the HopkinsOne project. An extensive recruitment process followed and in June of 2004, Louis Biggie became the new Associate Director of FITT.

The person who had been the lead financial administrative policy trainer, Maxine Given, was also tapped by the HopkinsOne project to lead the work related to Endowments. At the time of her departure, the decision was made to use this vacant position to hire an Instructional Designer. Each of the Training Specialists took on a heavier teaching load in order to be able to identify an individual capable of leading the e-learning development efforts. A search was held and a well qualified candidate for the position was made an offer, but she later declined and the position became vacant again just at the same time when the need for a long-term ISIS Training Specialist present itself. As of this writing, the position remains vacant, and discussions are proceeding as to how best to staff the FITT area.

Cross-Institutional Training Policy

The pilot year of the Cross-Institutional Training Policy came to a close, with a zero balance on both sides of the ledger after all activity had been counted. This policy allows hospital employees to attend department level training at the University, in university employees to attend similar programs at the hospital. In effect, the two institutions are “trading chairs” in an effort to allow employees who are in the minority to join their work group in training events which have been planned and sponsored as a benefit by an institution which does not employ them.

However, the policy doesn't really work well for JHH. First of all, it's not really an even playing field. The hospital doesn't offer nearly the amount of training that
the university does, so JHH risks owing the University money at the end of the year unless they can make significant efforts to build a balance of training on their side. Second, the amount of training that will be requested is always an unknown. We might end the year with a significant amount owing on either side. JHH offers departmental retreats in the same way that the Organization Development and Diversity department of the Office of Human Services does, but that doesn't equate to training. Once we make this option available to departments, we have no way to control or limit spending.

As of this writing, Greg Finnegan, Director of Organization Development and Training for JHH, has asked that we suspend the program until we can arrange for a meeting to discuss its future.

Web Connect

By the close of the year, efforts to install Web Connect (to provide the ability to register online) into the Aspen Registration System were nearing completion. This work was led by Lisa Finnen, Training Specialist in our FITT area, who did an outstanding job of navigating the maze of requirements to be addressed in working collaboratively with HITS and the vendor SumTotalSystems (formally Click2Learn) to make this system communicate accurately with the Johns Hopkins Enterprise Directory (JHED). This effort allows for employees to use their JHED ID to access this registration system, it verifies eligibility via the employee’s employment status and automatically creates/maintains employee records in this registration database from the JHED data.

ISIS Project

ISIS is the student registration system that Hopkins Information Technology Services has delivered for the institution across several divisions. Nicole Westrick was hired by HITS to be the Instructional Systems Designer and lead trainer for the roll out. As her workload increased, an additional designer, Jason Smith, was hired to support the project. But as the work of the project came to a close in the spring of 2005, HITS began to think about how the project could be established and training be made available in perpetuity. The FITT team was asked to take over responsibility for ISIS training, and to welcome Nicole Westrick and Jason Smith into the work unit.

As FY05 came to a close, the FITT Team had begun their work with the HopkinsOne ERP rollout effort, designing instructional materials as a way to develop expertise in the new SAP system, and preparing to deliver instruction and take over responsibility for the ongoing training for each new module after its initial delivery. When Maxine Given left her position as a Financial Administrative Training specialist to go to the HopkinsOne project, her position was restructured to become a position for an Instructional Technologist, and Joe McSharry was
hired to fill this position. Efforts were under way to move the design of e-learning coursework and learning objects in-house.
Educational Assistance Plans

An Educational Assistance Study Committee was formed in 1988 to review training and education needs and to evaluate the use of the Tuition Remission Plan. As a result of their recommendations, remission policies were revised in 1989 and responsibility for administering the plan was assigned to the training unit in the Office of the Vice President for Personnel programs. During the first year, a half million dollars were saved and reallocated to Staff Development Remission for support of training and development programs.

In 1992, responsibility for the Tuition Grant Plan was assigned to the Center for Training and Education. This plan pays a portion of the cost of tuition and mandatory academic fees for dependent children of full-time staff.

In 1994, two Tuition Reimbursement Plans were created. The first plan was negotiated as part of the Bargaining Unit contract and now covers only Bargaining Unit Members. The second plan was established to address the educational needs of staff that live and work in outlying areas such as Hagerstown, MD, Arizona, and California. Responsibility for both plans was assigned to the Center for Training and Education.

In 1996, an Information Technology systems analyst was hired to automate record keeping and the payment process for the Tuition Remission program. While some progress was made toward this goal, in 1999 an audit of the program led to the termination of the project. The decision was made to delay the plan until advances in the JHU university-wide student registration system could provide a platform that will support a more automated, computer-based version of the Tuition Remission system. Further, the university’s decision to purchase an Enterprise Resource Plan offers promise that more sophisticated and automated methods may be available to this program within a few years, so all efforts to modernize the program have been placed on hold until the new ERP becomes available.

FY 2006

Fiscal year 2006 found T&E staff participating in the Hopkins One rollout in a variety of ways. The Leadership Development Program went on as planned and experienced record numbers. At the same time, in response to the planned Hopkins One rollout, the Management Staff Development program canceled its spring semester offering, and then had to scramble to re-create a training schedule when the Hopkins One rollout was delayed until the fall. Even under this extreme situation, both programs were able to function without going into a deficit.
FITT staff spent two days a week at Mount Washington working to develop the custom help feature of the system and at the same time gained expertise in the functions of SAP. The addition of ISIS training staff members had allowed the addition of an instructional designer to work part time with the instructional technologist so that all e-learning design and development can now occur in house. Further, FITT was identified as the posts go-live training organization.

In the Educational Assistance Plan area, input was provided to the Hopkins One team about the functional requirements necessary for the system to meet the needs of the program. This was a year that was dominated by preparations for Hopkins One. Work to design a new tuition remission voucher process that would interact with the new SAP database began, along with efforts to make the paper tuition remission application form available online.