

School Management System Blended Learning Solution

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## Description of Client Organization and Client Need

The organization is a mid-sized company that provides software and services for K-12 schools to meet their data tracking and reporting needs. The School Management System (SMS) software is a Software as a Service (SaaS) offering, which means it is provided in a hosted environment. SaaS offerings are unique in that basic software training must be provided to customers before revenue can be recognized by the software provider.

In order to achieve an edge over competitors, the company needs a training package that not only provides basic training to meet the SaaS requirement, but also offers customers compelling, fee-based training “add-ons” that promote mastery of the business critical tasks of K-12 schools. The training package will allow clients to increase the return on their software investment and also increase sales and revenue for the company.

## Justification of Media and General Methods

### Program Type

Type 3 (Skills and Competency Development) with a “free” **Library** of asynchronous lessons on basic tasks (serving as the required SaaS training component) and a **Catalog** of instructor-led, face-to-face lessons on business critical tasks, which are taught at the customer site with the customer’s own data.

Authors’ Note: While the ideal training model is the blended model described in the previous paragraph, the **Library** also includes lessons on business critical tasks for three reasons: (1) to meet the SaaS training requirement, (2) to accommodate customers that do not have the budget for **Catalog** classes, and (3) to serve as “just in time” reference guides for software users who have participated in **Catalog** classes.

There is also the option for Type 4 (Certification Programs) with the annual **Training Campus** subscription, which includes the **Evaluation Center**. Following an existing model, it is expected that 80% of software sales will include the **Training Campus** subscription. The annual subscription fee will be “rolled into” the annual SaaS maintenance fee, which is a proven model for consistent renewal.

### Cultural Goals

Software users at the same school and across schools will interact with experts and each other in the **Café** and also in the monthly “best practices” **Webinars**. Software users will also interact

with each other in the **Playground** and **Evaluation Center** where they can earn points and badges. Leader boards display in all components so that participants can track their own progress and compete with others. This engagement enables them to create relationships, promote shared values, learn from each others' experiences, and gain skills to use the software efficiently and effectively.

## **Audience**

Because the audience is very large and widely dispersed (United States, Canada, England, Australia, and English-speaking schools in Asia), a highly scalable medium is necessary. There are numerous job roles in K-12 schools that need to be represented in the training curriculum, such as:

- System Administrator
- Admissions Director
- Admissions Office Data Entry Specialist
- Recruiter
- Guidance Counselor
- Registrar
- Registrar's Office Data Entry Specialist
- Teacher
- Scheduling Supervisor
- Attendance Clerk
- Grades Administrator
- Report Cards Administrator
- Transcripts Administrator
- Reporting Specialist

Depending on each school's size, budget, and business philosophy, each staff member may have one or multiple job roles. The lessons in the **Library** provide the "must-know" topics about the software, along with practice and review quizzes for assessment purposes. If an organization purchases classes from the **Catalog**, an onsite workbook with a training schedule is provided. Some of the **Library** lessons are identified as pre-class work and others are identified as post-class work.

**Audience Size:** The audience consists of software users at approximately 3,000 K-12 schools.

**Education Level:** Variable. High school Diploma to Ph.D.

At one end of the spectrum, there are job roles (such as Data Entry Specialist) that may require

only a high school degree at some organizations. At the other end of the spectrum, there are job roles (such as Systems Administrator) that may require graduate degrees at some organizations.

**Familiarity with Technology:** Variable. 0 to 10 on a 10-point scale.

At some schools, office staff and faculty have been in their positions for (literally) decades and are not very familiar with technology. At other schools, Generation X and Y personnel, who are very familiar with technology, are the standard. At still other schools, there is a mix of both of these user profiles.

**Motivation to Learn:** Variable. 0 to 10 on a 10-point scale.

Office staff members, who are entrenched in their ways, resistant to change, and possibly uncomfortable with technology, will have a low level of motivation. New personnel and those who are computer savvy will have more intrinsic motivation to learn because they are experiencing “pain points” with their existing software. They will be willing to take the time to learn a new program that will resolve their issues. Others will have extrinsic motivations, such as recruiters who want to learn how to correctly enter their data so they can get credit for their work.

**Time Available to Learn:** Variable. Depending on job role, number of job roles per person, and culture.

**Access to Network and PC:** Variable. At some organizations, personnel share computers to maximize their resources.

**Manager Involvement in Program:** As with all customer offerings, involvement cannot be mandated. We expect manager involvement to vary greatly, with the most involvement from managers at organizations that purchase the **Training Campus** subscription. The greater involvement relates to two issues: Branding and Accountability.

- **Branding:** The **Training Campus** subscription is branded as a vehicle for enhanced tracking of employee training, a gauge of employee engagement, and a method for ensuring mastery of business critical software skills.
- **Enhanced tracking of training:** The activities and scores in the **Playground** and **Evaluation Center** are tracked in the LMS.
- **Gauge of employee engagement:** In the **Café**, participants receive points based on the number and quality of their posts. They can also achieve badges identifying them as experts, such as guru.

- **Method for ensuring mastery of business critical software skills:** The games and activities in the Playground require speed, which is a measure of retention. The scenario-based activities in the **Evaluation Center** require software users to use higher-order cognitive skills, such as synthesis and evaluation to prove their mastery of topics.
- **Accountability:** Due to the ease of tracking and reporting and the monetary investment, organizations that purchase the **Training Campus** subscription will likely hold front line managers accountable for high participation rates.

## **Budget**

The budget for this project does not need to include the infrastructure and the LMS as it is already in place. Additionally, this model of training has been created for other software packages by the company and will require less process mapping. Therefore the budget includes the manpower required to develop training, the ongoing maintenance cost of the **Training Campus** subscription, and salaries and benefits for instructors of the **Catalog** of face-to-face training classes. These maintenance costs will be covered by the subscription fees and **Catalog** training costs to clients. The availability of these resources and the ongoing revenue from the **Training Campus** will keep the development budget manageable.

## **Resources**

Currently, there are people employed by the company that can fulfill the roles of Program Manager, Project Manager, Instructional Designer, Web Developer and Subject Matter Expert (SME). The Program Manager will be the Practice Manager of the Learning Technologies Team. The Project Manager is a former instructor who has over four years experience in project management. The Project Manager oversees a team of six instructional designers and two multimedia experts. The SMEs are members of both the Products Division (software designers and quality assurance analysts) and Customer Support Department (product leads). There will also need to be some information gathering from the sales force and other client experts (in the Product Management Department) to help the design team understand the features and characteristics that will motivate new clients to purchase the School Management System and **Training Campus**.

All these people are employed at company headquarters in Charleston, South Carolina, and have easy access to one another. However, timely access to SMEs is always difficult because their primary job roles are very time-intensive, especially close to the time of a software release.

## Time

**Development Time (Target Launch Date):** Development of the training curriculum will be done in phases approximately nine months before the identified launch date.

- The **Library** lessons, which can be accessed by all customers, must be completed first because the revenue for SaaS offerings cannot be recognized until training is provided. Also, the introductory lessons in the **Library** are pre-work for onsite training classes.
- The **Catalog** classes will be developed next because:
  - Onsite training is very lucrative for the company.
  - Historically, there is a large demand for onsite training from our larger customers.
  - This allows us to offer onsite training as “Train the Trainer” to organizations that cannot afford to train all employees (because of class size limits), but can afford one training class.
- The rest of the **Subscription** components in the **Training Campus (Café, Playground, and Evaluation Center)** will then be developed so that the company can offer:
  - A comprehensive training option to organizations that cannot afford onsite training.
  - A vehicle for ongoing learning.
  - A way to achieve socialization goals, such as access to experts and industry peers (in the **Café**), skill-building gaming (in the **Playground**), and a “funware loop” of games, points, badges, challenges, and levels (in all components). This also serves as a way for employers to gauge the knowledge and engagement of their employees.
  - A testing area (**Evaluation Center**) that allows (a) employers to mandate certification testing by their employees, and (b) individuals at organizations without a testing requirement to proactively seek mastery.

**Time to Complete (Target End Date):** Because the software is provided as SaaS, the **Library** lessons must be client-ready by the software release date (so that revenue can be recognized).

Ideally, they will be completed by the beginning of the beta program, which is slated to start 2 months before release. In practice, the **Library** lessons will be made available (as ready) for review by participants in the Early Adopter Program (EAP) up to six months before the release.

Ideally, the **Catalog** of classes will be available by the release date, but the delay of this component will not impact the recognition of revenue already received.

Ideally, the rest of the **Subscription** components (Café, Playground, and Evaluation Center) will then be available by the release date, but the delay of this component will not impact the recognition of revenue already received.

**Content Shelf Life (When Is Content Obsolete?):** Because the software development model is iterative, not “waterfall,” there will be ongoing additions to the software, and the software is not expected to be obsolete for many years.

To control the impact of the additions to the software, the company will provide scheduled biannual software releases. The extent of the effort required to update training materials for each release will depend on the content of the software updates. That is, are we add new functionality to an existing module or are we add an entirely new module. The required training updates by each release date are the updates to the **Library** lessons. The other components (**Catalog**, **Playground**, and **Evaluation Center**) can be updated as the schedule permits.

## Learning Content

**Content Complexity** – Variable. 1 to 8 on a 10-point scale.

There is a continuum of complexity. Some tasks, such as creating an applicant or room record are very easy. Other tasks, such as performing end of year processing or creating conditional mail merge letters are difficult. Still other tasks, such as defining GPA calculations or creating a master schedule are very complex.

**Content Interactivity (Learning by Doing)** – Variable.

The amount of interactivity increases in direct proportion to the content complexity. The **Catalog** classes, **Library** lessons, **Playground** games, and **Evaluation Center** challenges all incorporate interactivity. However, the **Catalog** classes and **Evaluation Center** include the highest levels of interactivity.

## Level of Tracking Needed (by module)

- **Enrollment** – Must track Enrollment for **Catalog** classes.

- **Activity** – Must track for Library lessons, Playground, and Evaluation Center.
- **Completion** – Must track Completion for **Library** lessons, **Playground**, **Evaluation Center**, and **Catalog** classes.
- **Scores** – Must track Scores for **Library** lessons, **Playground**, and **Evaluation Center**.
- **Certification** – Passing scores in the **Evaluation Center** act as certification.
- **Satisfaction** – Must track Satisfaction for **Library** lessons, **Playground**, **Evaluation Center**, and **Catalog** classes.
- **Business Impact** – This is not tracked by module. It is tracked by annual sales of the **Training Campus** subscription and **Catalog** classes.

## Technology Standards

- **Bandwidth Required:** 1000K
- **Plug-Ins Required:** None, except Flash, which is generally considered a built-in standard.
- **Tracking Standards:** The media will be SCORM-compliant and tested in the LMS. Tracking in terms of both usage and mastery (indicated by scores in the **Library**, **Playground**, and **Evaluation Center**) will be important in two regards. Clients will use tracking to justify the cost of the subscription. The software company's sales and marketing departments will use tracking data to demonstrate value to both prospective customers and existing customers who are considering cancelling their subscriptions.
- **Display Standards:** 800 x 600 pixel display; 16-bit color standards.
- **Security Standards:** No offline versions; Log in to hosted database required to access the **Training Campus**; no copying is permitted.

In general, different clients have different technology available to them, but since this is a SaaS offering, requirements will be made clear to prospective clients during the sales process.

- **Other Risk Areas:** Because the software is a SaaS offering, all clients are hosted on the software company's servers. To keep buffering time to a minimum, the company uses streaming, not embedded video, on a content delivery network (CDN).

## Overview of Blended Design

The blended design consists of two primary components, but also offers additional components, which are bundled in the annual **Training Campus** subscription.

(1) A **Library** of lessons (*Asynchronous*)

(2) A **Catalog** of instructor-led classes (*Face-to-Face*)

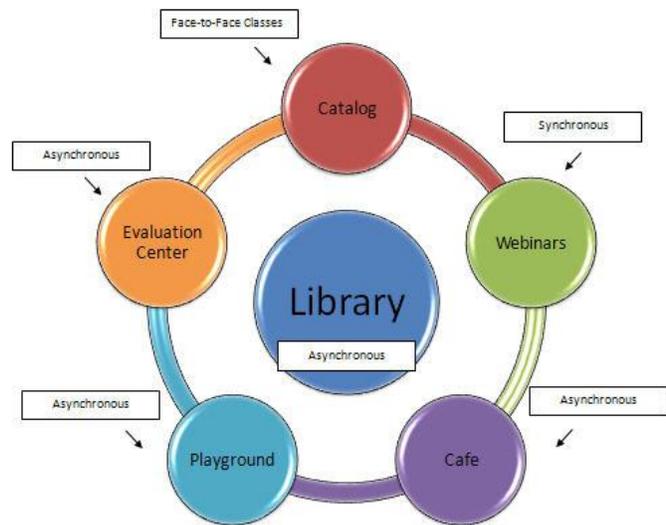
**Plus the optional Training Campus subscription, which includes:**

(3) Monthly instructor-led **Webinars** (*Synchronous*)

(4) **Café** – Discussion Board (*Asynchronous*)

(5) **Playground** – Drill Center (*Asynchronous*)

(6) **Evaluation Center** – Certification (*Asynchronous*) (Type 4: Certification Programs)



The subscription-based components provide additional strategies for learning and retention, such as interaction with experts and peers, gaming, and scored, scenario-based activities.

## Library

A collection of lessons that is included in the SaaS software to promote skills and competency development (Type 3 program). Asynchronous lessons are preferable for basic, foundational information for the following reasons:

- The participants can take the lessons at their own pace (Novices can take a long time, while savvy users can skip to practices).

- The participants can repeat lessons before and after training. For example, the lesson on Favorites can be used as "just in time" training in a few months when the information is forgotten.
- The time, expertise, and cost of a trainer are not "squandered" on introductory topics.

Each asynchronous lesson is short, interactive, and composed of reusable learning objects. Lessons are created using rapid elearning tools (PowerPoint and Captivate) and include the following components as appropriate.

There are three categories of elearning lessons in the **Library**. Only lessons in the first two categories are a part of the blended design solution.

- **Category 1** lessons relate to basic navigation and records management tasks that are not covered in the **Catalog** classes. Completion of these lessons is required prior to onsite training. The lessons are promoted as “partners” to the **Catalog** classes and are included in the training schedule provided in the onsite workbook.
- **Category 2** lessons relate to other tasks that are not covered in the **Catalog** classes. The lessons are promoted as “partners” to the **Catalog** classes and are included in the training schedule provided in the onsite workbook.
- **Category 3** lessons relate to business critical tasks that are covered in the **Catalog** classes. This category exists to (a) meet the SaaS training requirement, (b) accommodate customers that do not have the budget for onsite classes, and (c) serve as just-in-time refresher training for customers who have completed onsite classes.

Lessons in all three categories use a variety of strategies to promote learning and retention, such as The Big Picture and Practice.

Strategy	Description
The Big Picture	To gain attention and set context, each lesson includes a narrated slide with a graphical representation of how the feature fits into the overall strategy for getting work done quickly and efficiently. For example, defining Favorites helps a user more quickly access the program functions needed for specific tasks.
How It Helps	To gain attention and establish relevance, each slide includes a

Strategy	Description
	slide that states how the feature benefits the user (“What’s In It For Me” (WIIFM)). For example, saving links to important but infrequently used functions as Favorites can shorten the work cycle.
The Process	To act as an advance organizer and inspire confidence, lessons about multiple-step tasks include a narrated slide with a graphical representation (SmartArt) of the steps. For example, there are five steps to create a query: (1) Select the query type, (2) Select the query format, (3) Define criteria for records to include in the query results, (4) Select fields to display in the results, and (5) Determine the order in which records display in the results.
Guided Tour	Serving as both the Show and Tell components of the “Show-Tell-Do” instructional method, the Guided Tour is a narrated software “walk-thru” that illustrates a feature.
What Would You Do?	A scenario-based question or simulation to reinforce the information and skills presented in the Guided Tour.
Print This	A job aid for future reference.
Review	Questions that test achievement of the learning objectives.
Summary	A restatement of information related to the achievement of the learning objectives.
Reflection	Questions that promote thinking about how to use the feature to complete job tasks.

## Catalog

A **Catalog** of optional instructor-led classes (which are variably priced and taught face-to-face) that emphasize the business critical tasks of the customer. The classes are taught using customer data to promote mastery of the software and also reinforce the organization’s policies and procedures. **Catalog** classes include onsite workbooks that clearly link the two components of the blended model: **Library** and **Catalog**. The workbook lists the **Library** lessons that are required before and after onsite training and provides a recommended schedule for completion of

the lessons to connote their equal value with the onsite classes. The workbook also promotes the components of the Training Campus (**Café**, **Playground**, and **Evaluation Center**).

## **Webinars**

Monthly **Webinars** that discuss industry best practices and allow customers to interact with experts and each other.

## **Café**

A discussion board called the **Café**, which is moderated by software experts and encourages customer interaction.

## **Playground**

The **Playground**, where customers can practice their skills.

## **Evaluation Center**

The **Evaluation Center**, where software users can test their mastery either by choice or as required by their individual organizations.

## **Blended Design Solution**

Authors' Note: For the sake of brevity, this solution presents only the training track for registrar's office staff. All other tracks will be similar, with modified objectives based on job role. This section provides impact statements for all objectives for the **Catalog** classes, two objectives for **Category 1 Library** lessons (required prior to onsite classes), and one objective for a **Category 2 Library** lesson ("scheduled" after onsite classes).

### **Objective 1 – Asynchronous Category 1 Lesson: Required Prior to Onsite Training**

Demonstrate basic software program functions

- a. Navigate the program elements
- b. Manage the Favorites menu (Add, edit, and delete favorites)
- c. Manage the Home page (Add, edit, and delete items)
- d. Define login-specific preferences

## **Asynchronous Design Approach**

The design will utilize scenario-based learning principles with simulations to help users acquire the skills needed to efficiently navigate the software, organize information, and set user options. The design must accommodate learners with different levels of computer proficiency. Novice computer users must be given numerous opportunities to create retention hooks for the objective, such as The Big Picture and Practice. Experienced computer users must be able to “fast forward” the lesson by navigating directly to the scored review quiz. The inclusion of job aids is necessary for users who prefer printed reference materials. Complementary training materials must be designed for the **Playground** and **Evaluation Center**.

## **Impact on Participants**

The objective should be easily met because the concepts are straightforward, and the lesson is well-structured and interactive.

## **Impact on Design**

The design team is responsible for the slides that introduce and assert the relevance of the objective, such as The Big Picture and How It Helps. Simulations and job aids must be designed. Because these are basic functions, the need to update the content is unlikely.

The design team is responsible for the complementary games and evaluation activities that are part of the **Training Campus** subscription.

## **Impact on Facilitation Team**

Other than being aware of the included content and promoting the lesson as a “partner” to onsite training, the facilitation team has no responsibility for this objective.

## **Impact on the Organization**

The organization will benefit from employees who are able to easily navigate the software and are familiar with the available options for customizing their experience with the software. For example, users who know how to highlight relevant information and hide distracting information are more productive.

## **Impact on the Job**

The job aid and the constant availability of the lesson provide immediate support for novice users. Subscribers to **Training Campus** are able to access additional support structures in the **Café, Playground, and Evaluation Center**.

## **Assessment Plan**

There are two needs to be assessed: (1) the learning need of the end user, and (2) the business need of the software company. Achievement of the learning need is determined by users' scores on the review quiz. Achievement of the business goal of providing compelling, fee-based training add-ons to increase revenue is determined by subscribers' involvement in the **Café**, **Playground**, and **Evaluation Center** for this topic and the percentage of customers who renew their subscriptions.

## **Objective 2 – Asynchronous Category 1 Lesson: Required Prior to Onsite Training**

Manage records

- a. Search for records (Define criteria, search within a grouping, use wildcards)
- b. Identify the types of data stored on each record type
- c. Manage records (Add, edit, link, convert, and delete records)
- d. Manage default sets of information (Create, edit, and load defaults)

## **Asynchronous Design Approach**

The design will utilize scenario-based learning principles with simulations to help users acquire the skills needed to successfully maintain accurate, robust data on all people and organizations affiliated with their schools. The design will provide numerous practices for more complicated topics, such as linking records to each other, using default sets to expedite data entry, and converting a record to another record type (for example, when a sibling becomes a student).

The design will include a section on the importance of defining and enforcing data entry policies, and the lesson will link to a sample policies and procedures guide.

The inclusion of job aids is necessary for users who prefer printed reference materials. Complementary training materials must be designed for the **Playground** and **Evaluation Center**.

## **Impact on Participants**

Users are often intimidated by new software because they are comfortable with their existing software. This is the case even if the existing software does not provide all the functionality they need or offer options for streamlining commonly performed tasks. By having the option to practice important and time-saving skills more than once – and in the context of job-relevant scenarios – participants will gain confidence in their ability to efficiently perform their jobs with the software. They will also gain an appreciation for the new software, which will increase their motivation to continue learning how to use it.

## **Impact on Design**

The design team is responsible for the slides that introduce and assert the relevance of the objective, such as The Big Picture and How It Helps. The design team is also responsible for creating job-relevant simulations, concise job aids, and a sample policies and procedures guide. Because the objective relates to core functions, the need to update the content is unlikely.

The design team is responsible for the complementary games and evaluation activities that are part of the **Training Campus** subscription.

## **Impact on Facilitation Team**

Other than being aware of the included content and promoting the lesson as a “partner” to onsite training, the facilitation team has no responsibility for this objective.

## **Impact on the Organization**

The organization will benefit from employees who are confident in their ability to fulfill their job duties in relation to records and able to implement the time-saving features available in the software.

## **Impact on the Job**

Users can perform tasks related to records after very little “down time,” and they have ongoing support in the job aids and numerous job-relevant practices. Subscribers to **Training Campus** are able to access additional support structures in the **Café, Playground, and Evaluation Center**.

## **Assessment Plan**

There are two needs to be assessed: (1) the learning need of the end user, and (2) the business need of the software company. Achievement of the learning need is determined by users’ scores on the review quizzes. Achievement of the business goal of providing compelling, fee-based training add-ons to increase revenue is determined by subscribers’ involvement in the **Café, Playground, and Evaluation Center** for this topic and the percentage of customers who renew their subscriptions.

### **Objective 3 - ILT**

Configure registration components of School Management System (SMS)

- a. Define an academic year
- b. Define addressee/salutation formulas
- c. Define attributes
- d. Define field settings
- e. Define business rules

### **Classroom Design Approach**

This will be the first day of the training course and is designed to make users more comfortable and competent with School Management System. Before the course, users will have taken some introductory eLearning lessons that will familiarize them with the basic program navigation and management of records. This course will also utilize school-specific data, and instruction will be directed towards the specifics of configuring registration information in ways that are specific to and increase the efficiency of school operations. The class will be onsite using computers that belong to the school and are set up with the configuration and software that is available to the learners in their work setting. This portion of the training will be relevant to most/all registration personnel and class size will depend on the number of staff in the registrar's office.

This topic will be addressed through a combination of facilitator demonstration of tasks in the software, guided practice through the software, and opportunity to practice the process. Learners will work with partners to define an academic year and then individually to work with attributes and fields in order to accomplish job-specific tasks. The facilitators will be available during practice times to work with learners who need additional instruction and to show advanced techniques to those who desire additional knowledge.

### **Impact on Participants**

This learning approach will enable learners to make effective transitions to their daily job tasks because the data will be familiar and they will be defining the processes specific to their school setting. The learners will work with school data to learn about configuring the software for registration tasks according to their current needs. This allows for guided learning through this complex process and a model to be used in the future.

## **Impact on Design**

It will be important that the design is able to accommodate learners with different levels of computer proficiency. It is also important that the design provides time for (a) looking at tasks as a group, and (b) practicing processes individually. This strategy allows those with greater computer proficiency to assist those with more difficulty. These activities will need to be alternated with breaks and opportunities for questions so that there is ample time for people to process and practice what is being taught.

The design team is responsible for the complementary games and evaluation activities that are part of the **Training Campus** subscription.

Designers will need to include the appropriate job aid(s) in the onsite workbook.

## **Impact on Facilitation Team**

Before the training session, the facilitation team will need to contact the client school to determine their needs in relation to academic years, addressee/salutation formulas, attributes, field settings and business rules. They will also need to discuss the type of data the school has available and how they would like it incorporated. Specific business critical tasks will also need to be determined so that training can address all these areas and be customized for the client's needs.

During the training, the facilitators will need to confirm the identified business critical tasks to become aware of and meet any additional needs. They will also need to be aware of the learner levels in the class to provide advanced knowledge and additional instruction to those who need it.

## **Impact on the Organization**

By using a customized classroom approach, the employees of the school will have greater workplace transfer thereby increasing effectiveness and competence with the new software. Also, while it will take some time for someone to speak to the facilitation team about the business critical tasks and school data, this will translate into job- and data-relevant training exercises in a guided setting, which ensures that learners develop an understanding of the processes and can accomplish them effectively.

## **Impact on the Job**

Learning tasks that are specific to real job tasks with the actual data will communicate the relevance of the training to learners and help in retention of learning.

## **Assessment Plan**

Throughout the training, learners will define a new academic year, addressee/salutation formulas, attributes, field settings, and business rules that apply to their workplace setting. They will also have an opportunity to test these to determine that they operate correctly. Facilitators will be able to provide remediation if necessary and reinforce the correct setup of components. While this is an informal assessment, it demonstrates ability to perform critical business tasks and will have greater impact on job success than a quiz.

At the end of the training day, there will also be an opportunity for participants to explain how the different processes work to determine if there is retention and to allow for any correction that is needed.

## **Objective 4 – ILT**

Define administration options of School Management System (SMS).

- a. Define system security options
  - i. Security groups
  - ii. Security users
- b. Define the criteria for identifying duplicate records and merge duplicate records
- c. Add records to the database using the Global Add wizard
- d. Update existing records using the Global Change wizard

## **Classroom Design Approach**

This will be the second day of the training course and is designed to make users more comfortable and competent with School Management System. Before the course, users will have taken some introductory eLearning lessons that will familiarize them with the basic program navigation and management of records. This course will also utilize school-specific data, and instruction will be directed towards the specifics of security and administrative tasks common to the registrar's office. The class will be onsite using computers that belong to the school and are set-up with the configuration and software that is available to the learners in their work setting. This portion of the training may not be relevant to all registration personnel and class size will depend on the number of staff whose job tasks relate to the topic.

This topic will be addressed through a combination of facilitator demonstration of tasks in the software, guided practice through the software, and opportunity to practice the process. Participants will work in pairs defining security options and then manipulate records by using a copy of the client's student record database to merge, add, and update records. The facilitators

will be available during practice times to work with learners who need additional instruction and to show advanced techniques to those who desire additional knowledge.

### **Impact on Participants**

This learning approach will enable learners to make effective transitions to their daily job tasks because the data will be familiar and they will be defining the processes specific to their school setting. The learners will work with school data to learn about merging records and adding and updating existing records using Global wizards. This allows for guided learning with school-specific definitions through this complex process.

### **Impact on Design**

It will be important that the design is able to accommodate learners with different levels of computer proficiency and provides time for looking at tasks as a group in addition to opportunities to practice processes individually. This strategy allows those with greater computer proficiency to assist those with more difficulty. These activities will need to be alternated with breaks and opportunities for questions so that there is ample time for people to process and practice what is being taught.

The design team is responsible for the complementary games and evaluation activities that are part of the **Training Campus** subscription.

Designers will need to include the appropriate job aid(s) in the onsite workbook.

### **Impact on the Facilitation Team**

Before the training session, the facilitation team will need to contact the client school to determine their needs in relation to security, determining duplicate records and globally adding or updating records. They will also need to discuss the type of data the school has available and how they would like it incorporated. Specific business critical tasks will also need to be determined so that training can address all these areas and be customized for the client's needs.

During the training, the facilitators will need to confirm the identified business critical tasks to become aware of and meet any additional needs. They will also need to be aware of the learner levels in the class to provide advanced knowledge and additional instruction to those who need it.

### **Impact on the Organization**

By using a customized classroom approach, the employees of the school will have greater workplace transfer thereby increasing effectiveness and competence with the new software.

Also, while it will take some time for someone to speak to the facilitation team about the business critical tasks and school data, this will translate into job- and data-relevant training exercises in a guided setting, which ensures that learners develop an understanding of the processes and can accomplish them effectively.

### **Impact on the Job**

Learning tasks that are specific to real job tasks with the actual data will communicate the relevance of the training to learners and help in retention of learning.

### **Assessment Plan**

Throughout the training, learners will define security settings including users and groups and will have an opportunity to test these to determine that they operate correctly. They will also work with current data to practice globally creating and updating existing records. Facilitators will be able to provide remediation if necessary and reinforce the correct setup of components. While this is an informal assessment, it demonstrates ability to perform critical business tasks and will have greater impact on job success than a quiz.

At the end of the training day, there will also be an opportunity for participants to explain how the different processes work to determine if there is retention and to allow for any correction that is needed.

### **Objective 5 - ILT**

Define a master schedule and scheduling tasks with School Management System (SMS).

- a. Perform preparation steps (Review academic year, define settings on records, define core curricula, and define scheduling options)
- b. Create and edit a master schedule
- c. Assign faculty and rooms
- d. Enroll/transfer/drop/withdraw students from a class
- e. Generate schedule reports

### **Classroom Design Approach**

This will be the morning portion of the third day of the training course and is designed to make users more comfortable and competent with School Management System. Before the course, users will have taken some introductory eLearning lessons that will familiarize them with the basic program navigation and record management. This course will also utilize school-specific data, and instruction will be directed towards the specifics of scheduling tasks common to the

registrar's office. The class will be on-site using computers that belong to the school and are set up with the configuration and software that is available to the learners in their work setting. This portion of the training may not be relevant to all registration personnel and class size will depend on the number of staff whose job tasks relate to the topic.

This topic will be addressed through a combination of facilitator demonstration of tasks in the software, guided practice through the software, and opportunity to practice the process. Participants will define a master schedule template and then practice each scheduling topic, creating a usable master schedule. The facilitators will be available during practice times to work with learners who need additional instruction and to show advanced techniques to those who desire additional knowledge.

### **Impact on Participants**

This approach to learning these topics will enable the learner to make effective transitions to the work they actually have to accomplish because the data will be familiar and they will be setting up security users and groups for their setting. The learners will work with school data to learn about scheduling tasks. This allows for guided learning through this more complex process that use school specific definitions.

### **Impact on Design**

It will be important that the design is able to accommodate learners with different levels of computer proficiency and provides time for looking at tasks as a group in addition to opportunities to practice processes individually, taking advantage of those with greater computer proficiency to assist those with more difficulty. These activities will need to be alternated with breaks and opportunities for questions so that there is ample time for people to process and practice what is being taught.

The design team is responsible for the complementary games and evaluation activities that are part of the **Training Campus** subscription.

Designers will need to include the appropriate job aid(s) in the onsite workbook.

### **Impact on Facilitation Team**

Before the training session, the facilitation team will need to contact the client school to determine their needs in relation to scheduling. They will also need to discuss the type of data the school has available and how they would like it incorporated. Specific business critical tasks will also need to be determined so that training can address all these areas and be customized for the client's needs.

During the training, the facilitators will need to confirm the identified business critical tasks to become aware of and meet any additional needs. They will also need to be aware of the learner levels in the class to provide advanced knowledge and additional instruction to those who need it.

### **Impact on Organization**

By using a customized classroom approach, the employees of the school will have greater workplace transfer thereby increasing effectiveness and competence with the new software. Also, while it will take some time for someone to speak to the facilitation team about the business critical tasks and school data, this will translate into job- and data-relevant training exercises in a guided setting, which ensures that learners develop an understanding of the processes and can accomplish them effectively.

### **Impact on the Job**

Learning tasks that are specific to real job tasks with the actual data will communicate the relevance of the training to learners and help in retention of learning.

### **Assessment Plan**

Throughout the training, learners will create a master schedule. They will also work with current data to practice scheduling faculty, rooms, and students, and generate reports. Participants will also demonstrate a scheduling task for their fellow participants to both reinforce the learning and provide an assessment check for the facilitators. Facilitators will be able to provide remediation if necessary and reinforce correctly set up components. While this is an informal assessment, it demonstrates ability to perform critical business tasks and will have greater impact on job success than a quiz.

At the end of the morning, there will also be an opportunity for participants to explain how the different processes work to determine if there is retention and to allow for any correction that is needed.

## **Objective 6 - ILT**

Describe and define custom reports and queries

- a. Define and edit a custom report
- b. Open a saved customized report
- c. Define user options for a query
- d. Describe and define available query types, properties and parameters.
- e. Create a query
- f. Open a saved query

### **Classroom Design Approach**

This will be the afternoon portion of the third day of the training course and is designed to make users more comfortable and competent with School Management System (SMS). Before the course, users will have taken some introductory eLearning lessons that will familiarize them with the basic program navigation and management of records. This course will also utilize school-specific data, and instruction will be directed towards creating and using customized reports and queries common to the registrar's office. The class will be onsite using computers that belong to the school and are set-up with the configuration and software that is available to the learners in their work setting. . This portion of the training will be relevant to most/all registration personnel and class size will depend on the number of staff in the registrar's office.

This topic will be addressed through a combination of facilitator demonstration of tasks in the software, guided practice through the software, opportunity to practice the process, and, finally, using the knowledge to create custom reports and set up job-related queries that will be helpful to their job task. The facilitators will be available during practice times to work with learners who need additional instruction and to show advanced techniques to those who desire additional knowledge.

### **Impact on Participants**

This learning approach will enable learners to make effective transitions to their daily job tasks because the data will be familiar and they will be creating relevant reports and queries. The learners will work with school data to learn about reporting and grouping (query) tasks according to their current needs. This allows for guided learning through this process using school-specific definitions.

### **Impact on Design**

It will be important that the design is able to accommodate learners with different levels of computer proficiency. It is also important that the design provides time for (a) looking at tasks as a group, and (b) practicing processes individually. This strategy allows those with greater computer proficiency to assist those with more difficulty. These activities will need to be alternated with breaks and opportunities for questions so that there is ample time for people to process and practice what is being taught.

The design team is responsible for the complementary games and evaluation activities that are part of the **Training Campus** subscription.

Designers will need to include the appropriate job aid(s) in the onsite workbook.

### **Impact on Facilitation Team**

Before the training session, the facilitation team will need to contact the client school to determine their needs in relation to customized reports and queries. They will also need to discuss the type of data the school has available and how they would like it incorporated. Specific business critical tasks will also need to be determined so that training can address all these areas and be customized for the client's needs.

During the training, the facilitators will need to confirm the identified business critical tasks to become aware of and meet any additional needs. They will also need to be aware of the learner levels in the class to provide advanced knowledge and additional instruction to those who need it

### **Impact on the Organization**

By using a customized classroom approach, the employees of the school will have greater workplace transfer thereby increasing effectiveness and competence with the new software. Also, while it will take some time for someone to speak to the facilitation team about the business critical tasks and school data, this will translate into job- and data-relevant training exercises in a guided setting, which ensures that learners develop an understanding of the processes and can accomplish them effectively.

### **Impact on the Job**

Learning tasks that are specific to real job tasks with the actual data will communicate the relevance of the training to learners and help in retention of learning.

### **Assessment Plan**

Throughout the training, learners will create customized reports. They will also define and use using queries. Facilitators will be able to provide remediation if necessary and reinforce correctly

setup components. While this is an informal assessment, it demonstrates ability to perform critical business tasks and will have greater impact on job success than a quiz.

At the end of the afternoon, there will also be an opportunity for participants to explain how the different processes work to determine if there is retention and to allow for any correction that is needed.

## **Objective 7 – Asynchronous Category 2 Lesson: “Scheduled” After Onsite Training**

Perform Export functions

- a. Describe the common uses of exported data
- b. Identify export components (Types, filters, fields, styles, and format)
- c. Manage exports (Add, edit, and delete exports)

### **Asynchronous Design Approach**

The design will utilize scenario-based learning principles with simulations to help users acquire the skills needed to export data for use in other applications, such as Microsoft Excel®. The design will provide practices for each individual step in the multi-step process and will also provide “Put It Together” simulations to promote synthesis and retention.

The inclusion of job aids is necessary for users who prefer printed reference materials. Complementary training materials must be designed for the **Playground** and **Evaluation Center**.

### **Impact on Participants**

Exporting data is a complex process. By practicing each step in the process multiple times and then practicing the entire process multiple times, participants will gain proficiency, confidence, and satisfaction.

### **Impact on Design**

The design team is responsible for the slides that introduce and assert the relevance of the objective, such as The Big Picture, How It Helps, and The Process. The design team is also responsible for creating job-relevant simulations and the job aid. Because the only changes to the feature will relate to new fields in the available list of fields, the need to update the content is unlikely.

The design team is responsible for the complementary games and evaluation activities that are part of the **Training Campus** subscription.

### **Impact on Facilitation Team**

Other than being aware of the included content and promoting the lesson as a “partner” to onsite training, the facilitation team has no responsibility for this objective.

### **Impact on the Organization**

The organization will benefit from employees who are able to perform a complex task successfully without consulting assistance. The organization will therefore be able to resume its important data export tasks – for analysis and reporting purposes – quickly after adoption of the new software.

### **Impact on the Job**

Users can export data after very little “down time,” and they have ongoing support in the job aid and numerous job-relevant practices. Subscribers to **Training Campus** are able to access additional support structures in the Café, Playground, and Evaluation Center.

### **Assessment Plan**

There are two needs to be assessed: (1) the learning need of the end user, and (2) the business need of the software company. Achievement of the learning need is determined by users’ scores on the review quiz. Achievement of the business goal of providing compelling, fee-based training add-ons to increase revenue is determined by subscribers’ involvement in the **Café**, **Playground**, and **Evaluation Center** for this topic and the percentage of customers who renew their subscriptions.

## **Additional Objectives – Asynchronous Category 2 Lessons: “Scheduled” After Onsite Training**

### **Objective 8: Manage Attendance tasks**

- a. Identify attendance entry methods (By day, class, and student)
- b. Manage attendance tasks (Searching for attendance entries, selecting attendance codes, and entering comments)
- c. Use global functions (Globally add and delete attendance entries)

### **Objective 9: Generate Mailings**

- a. Identify mail categories
- b. Describe the use of each tab on a mailing parameter set
- c. Manage mailings (Add, preview, edit, export, and delete mailings)

### **Objective 10: Generate Report Cards**

- a. Identify report card sections

- b. Describe the use of each tab on a report card parameter set
- c. Manage report cards (Add, preview, edit, export, and delete report cards)

### **Objective 11: Generate Transcripts**

- a. Identify report card sections
- b. Describe the use of each tab on a transcript parameter set
- c. Manage transcripts (Add, preview, edit, export, and delete transcripts)

## **Detailed Description of the Supplemental Components of the Blended Solution**

As previously stated, the blended design consists of two primary components, but also offers additional components, which are bundled in the annual **Training Campus** subscription.

### **Café (Discussion Board)**

In order to encourage best practices and sharing of new techniques a discussion board (called the **Café**) will be set-up. The discussion board will be available to all clients who purchase subscription training. As with the software and other supplemental components, the **Café** will be hosted by the software company. Discussion threads will target different job functions and tasks and bring together users that have common job roles to share tips and best practices. The **Café** will also feature an “Experts’ Tips” section written by the facilitator team.

Through this discussion board, the software company will be able quickly inform participants about features of new software releases, and participants will (a) increase their knowledge and competencies with the software, and (b) build a community of support. The facilitator team will need to be aware of what is going on in the discussion board on a regular basis to ensure that information is accurate and up-to-date.

To encourage involvement and contribute to the “funware loop” in the **Training Campus**, participants will earn points for their posts in the **Café**. They will also earn points and badges (such as Guru) based on the ratings they receive from other participants regarding the helpfulness of their posts. In all components of the **Training Campus**, points will be tallied on a leaderboard visible to all participants.

### **Playground**

The **Playground** is an area that provides reinforcement games and activities based on the learning objectives for the School Management System. It will be available to all clients who purchase the supplemental subscription training. This area is hosted by the software company. The design team and facilitator team will create activities that align with the objectives and provide “real world” simulation type practice of the software. The **Playground** will also have “drill” type activities so that participants can grow more comfortable and competent in the software through an engaging variety of activities instead of continually repeating the same lessons.

As participants engage in these games and activities, they will earn points that will (a) advance them on leaderboard, and (b) open new levels of gaming to them. Points will be awarded based on success in games, activities, and challenges from other participants. This friendly competition will motivate participants to continue engaging with the **Training Campus** and the software.

## **Evaluation Center**

The **Evaluation Center** is geared to those clients who want their employees to achieve certification in the School Management System, but it is also available to any participant who would like to achieve this status. This area is hosted by the software company and takes advantage of the LMS system to track the participant’s progress through the **Evaluation Center**. The certification tests will be directly related to the learning objectives and measure the participant’s ability and knowledge of the School Management System. Participants can get certification in a specific role or a master certification that covers all aspects of the software.

Participants will receive points for each activity they complete in the **Evaluation Center**. Participants who complete certification will receive a badge showing their certification. Like all other badges, this badge will be visible on the leaderboard and in the users’ profiles.

**Blended Design Schedule**

**Before Day 1 Schedule (elearning lessons)**

<b>Daily Activities</b>	<b>Time Required</b>	<b>Resources Required</b>
Participants will complete Introduction to Program elearning lessons. Participants will complete Introduction to Records elearning lessons	Sixty minutes in synchronous lessons.	Computer with Internet access  Onsite Workbook (which will be sent to the client site two weeks before the scheduled training)

**Day 1 Schedule (ILT)**

<b>Timing</b>	<b>Topic</b>	<b>Objective</b>	<b>Materials Needed</b>	<b>Process/Activity</b>	<b>Potential for Assessment</b>
8:00 – 8:15 am	Housekeeping and Welcome				
8:15 – 8:45 am	Learner Goals & Review of Basic Navigation			Learners will have an opportunity to share their specific goals for the training session  Basic navigation will be reviewed	

<b>Timing</b>	<b>Topic</b>	<b>Objective</b>	<b>Materials Needed</b>	<b>Process/Activity</b>	<b>Potential for Assessment</b>
8:45 – 11:15 am  (includes 10 minute break)	Define an Academic Year	Configure registration components of software	Computers  Academic year information  Job Aid: Define Academic Year (in onsite workbook)	10 minute lecture/discussion  20 minute demonstration  50 minute partner try-it  30 minute debrief and review and answer questions  20 minute fix and create final  10 minute wrap-up	Debrief of defining academic year will allow facilitators to asses understanding.
11:15 – 12:05 pm	Define addressee/salutation formulas	Configure registration components of software	Computers  Job Aid: Addressee/Salutation formulas (in onsite workbook)	10 minute discussion  20 minute guided demonstration and try-it  10 minute individual practice  10 minute review, questions and wrap-up	Participants will test their work by creating a job document during individual practice.

<b>Timing</b>	<b>Topic</b>	<b>Objective</b>	<b>Materials Needed</b>	<b>Process/Activity</b>	<b>Potential for Assessment</b>
12:15 – 1:00 pm	LUNCH				
1:00 – 1:50 pm	Define attributes	Configure registration components of software	Computers  Job Aid: Attributes (in onsite workbook)	10 minute discussion  20 minute guided demonstration and try-it  10 minute individual practice  10 minute review, questions and wrap-up	Participants will test their work by creating a job document during individual practice.
1:50 – 2:50 pm  (includes 10 minute break)	Define field settings	Configure registration components of software	Computers  Job Aid: Field Settings (in onsite workbook)	10 minute discussion  20 minute guided demonstration and try-it  10 minute individual practice  10 minute review, questions and wrap-up	Participants will test their work by creating a job document during individual practice.

<b>Timing</b>	<b>Topic</b>	<b>Objective</b>	<b>Materials Needed</b>	<b>Process/Activity</b>	<b>Potential for Assessment</b>
2:50 – 3:40 pm	Define business rules	Configure registration components of software	Computers  Job Aid: Business Rules (in onsite workbook)	10 minute discussion  20 minute guided demonstration and try-it  10 minute individual practice  10 minute review, questions and wrap-up	Participants will test their work by creating a job document during individual practice.
3:40 – 4:00 pm	End of Day 1 wrap-up			Each person will share a key point they learned that will be essential to their job function.	

**Day 2 Schedule (ILT)**

<b>Timing</b>	<b>Topic</b>	<b>Objective</b>	<b>Materials Needed</b>	<b>Process/Activity</b>	<b>Potential for Assessment</b>
8:00 – 8:15 am	Housekeeping and Welcome				
8:15 – 10:15 am (includes 10 min. break)	Define Security Options: Security Groups	Define registration related administrative tasks of the software.	Computers  Job Aid: Define Security Options (in onsite workbook)	10 minute lecture/discussion  20 minute demonstration  50 minute partner try-it  20 minute debrief and review and answer questions  10 minute wrap-up	Debrief of defining security group options will allow facilitators to assess understanding.

<b>Timing</b>	<b>Topic</b>	<b>Objective</b>	<b>Materials Needed</b>	<b>Process/Activity</b>	<b>Potential for Assessment</b>
10:15 – 12:15 pm	Define Security Options: Security User	Configure registration components of software	Computers  Job Aid: Define Security Options (in onsite workbook)	10 minute lecture/discussion  20 minute demonstration  50 minute partner try-it  20 minute debrief and review and answer questions  10 minute wrap-up	Debrief of defining security users options will allow facilitators to assess understanding.
12:15 – 1:00 pm	LUNCH				
1:00 – 1:50 pm	Criteria for identifying and merging duplicate records	Configure registration components of software	Computers  Student Records  Job Aid: Merging Duplicate Records (in onsite workbook)	10 minute discussion  10 minute guided demonstration and try-it  20 minute individual practice and merge duplicate records  10 minute review, questions and wrap-up	Participants will merge duplicate records

<b>Timing</b>	<b>Topic</b>	<b>Objective</b>	<b>Materials Needed</b>	<b>Process/Activity</b>	<b>Potential for Assessment</b>
1:50 – 2:50 pm  (includes 10 min. break)	Global Wizards: Add Records	Configure registration components of software	Computers  Student Records  Job Aid: Global Wizards (in onsite workbook)	10 minute discussion  10 minute guided demonstration and try-it  20 minute individual practice and add records.  10 minute review, questions and wrap-up	Participants will add records using the wizard.
2:50 – 3:40 pm	Global Wizards: Change Records	Configure registration components of software	Computers  Student Records  Job Aid: Global Wizards (in onsite workbook)	10 minute discussion  10 minute guided demonstration and try-it  20 minute individual practice and update records.  10 minute review, questions and wrap-up	Participants will update records using the wizard.
3:40 – 4:00 pm	End of Day 2 wrap-up			Each person will share a key point they learned that will be essential to their job function.	

### Day 3 Schedule (ILT)

<b>Timing</b>	<b>Topic</b>	<b>Objective</b>	<b>Materials Needed</b>	<b>Process/Activity</b>	<b>Potential for Assessment</b>
8:00 – 8:15 am	Housekeeping and Good morning				
8:15 – 11:45 am  (includes 15 min. break)	Scheduling	Define a master schedule and perform scheduling tasks	Computers  Client schedule information  Job Aid: Scheduling Tasks (in onsite workbook)	10 minute lecture/discussion  60 minute guided demonstration and try-it: creating a master schedule  20 minute debrief and review and answer questions  10 minute demonstration followed by 10 minute individual practice (for each scheduling topic)  25 minute participant demonstrations	Participants will demonstrate a scheduling task on the instructor machine for other participants
11:45 – 12:15 pm	Wrap-up of scheduling tasks			Participants will each share a key idea about scheduling.	
12:15 – 1:00 pm	LUNCH				

<b>Timing</b>	<b>Topic</b>	<b>Objective</b>	<b>Materials Needed</b>	<b>Process/Activity</b>	<b>Potential for Assessment</b>
1:00 – 2:00 pm	Reports	Define custom reports and queries	Computers Client data Job Aid: Custom Reports (in onsite workbook)	10 minute discussion 20 minute demonstration 20 minute individual practice and share 10 minute review, questions and wrap-up	Participants will share a custom report they created
2:00 – 3:40 pm  (includes 15 min. break)	Queries	Define custom reports and queries	Computers Client data Job Aid: Queries (in onsite workbook)	15 minute discussion 20 minute demonstration 30 minute partner practice and test 20 minute review, questions and wrap-up	
3:40 – 4:00 pm	End of Day 3 wrap-up			Each person will share a key point they learned that will be essential to their job function.	

### After Day 3 Schedule

<b>Ongoing Activities</b>	<b>Time Required</b>	<b>Resources Required</b>
<b>Library</b> - Participants will complete various elearning lessons that demonstrate more functions of the School Management System.	Varies but individual lessons will be 5-8 minutes. Can be completed in the weeks following the face to face training.	Computer with Internet access Onsite Workbook
<b>Playground</b> Activities - Participants should spend time playing relevant games and activities over the course of their use of training lessons.	Participants may spend as little or as much time as is necessary to reinforce learning.	Computer with Internet access Lesson notes and Job Aids as reference materials (in onsite workbook)
<b>Café</b> Discussion Board – Participants should read and post on the discussion board to learn and share with the client community.	Participants should spend time weekly reviewing posts and participating in discussions to learn and develop industry “best practices”	Computer with Internet access Onsite Workbook
<b>Webinars</b> on “Best Practices”	60- minute monthly webinars	Computer with Internet access Sound card and headphones with microphone
<b>Evaluation Center</b> – Participants will complete assessments for one or more certifications.	4-20 hours depending on what certification(s) being completed.	Computer with Internet access

## Summary

The organization is a mid-sized company that sells hosted software (SaaS) to K-12 schools. As part of the SaaS model, clients must receive training on the software before the company can recognize revenue from software sales. This paper outlined a blended model that allows the company to provide a robust, effective training program in the form of a **Library** of lessons and a **Catalog** of instructor-led classes, which are taught on customer sites using customer data. The training program also includes synchronous (**Webinars**) and asynchronous offerings (**Café**, **Playground**, and **Evaluation Center**) as part of an annual subscription program to help promote client mastery of business critical skills and increase revenue for the software company.