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Trends & Issues INTE 6750

Change Project Document

Moving to a Culture of Performance Support at the Port of Seattle

CONTEXT

As a public organization, policies and processes at the Port of Seattle are complicated by the need for transparency and accountability to the public and (often politically motivated) Port commissioners. The Port is also continually subject to litigation from a variety of sources and works tirelessly to project an image as a responsible organization that utilizes public money in a prudent and thrifty manner. This creates an environment where caution and fear of standing out prevail. Good benefits such as excellent health care and state employee pension plan encourage employee longevity. A large percentage of Port employees have worked for this organization many years and wish to stay until retirement. Change in this organization of any kind has historically been slow and difficult to implement.

A new CEO with a long history with large private sector corporations is determined to change the climate and culture of the Port. Upon arrival last fall, he began immediately reorganizing and replacing directors and promoting his vision of the future of the Port. This future includes Lean process implementation.

An enterprise-wide lean program is scheduled to be implemented within the next 6 months. The goal is to institute lean principle training to all employees to help reduce waste within the organization.

One change important to the survival of the learning and development function in our new lean and reorganizing era, is for the learning and development function to make the products we

develop and the learning inventions we create strategic, efficient devices which help improve employee day-to-day performance.

PROBLEM

In our world of rapidly-changing technology and hastily expiring information, employees waste hours each day searching for information regarding procedures, policies, and training required to get their work done correctly.

According to Lean definitions, I have identified several types of wastes present within the employee training and development in our organization.

Wastes of:

- **Skills:** Under-utilizing capabilities and delegating tasks with inadequate training.
- **Defects:** Extra efforts caused by rework and incorrect information
- **Waiting:** Wasted time waiting for the next step in a process (or for information)
- **Motion:** Unnecessary movements by people (such as walking to ask a question)
- **Extra-Processing:** More work than is required

What is wrong with current solutions?

1. Instructor-led training classes often occur weeks or months before a process or tool is actually implemented so little is retained by the time the employee needs to apply the information.
2. Instructor-led classes offered, instructor-led during a regular 9-5 shift - the shift the SME works.
3. If reinforcing materials such as job aids exist, they have been produced at the department level and are difficult if not impossible to find on department SharePoint sites.
4. The Port has a large percentage of employees at or nearing retirement age. There is an increasing need to capture organizational knowledge for the next generation of workers.

Below is a link to a video which illustrates this problem:

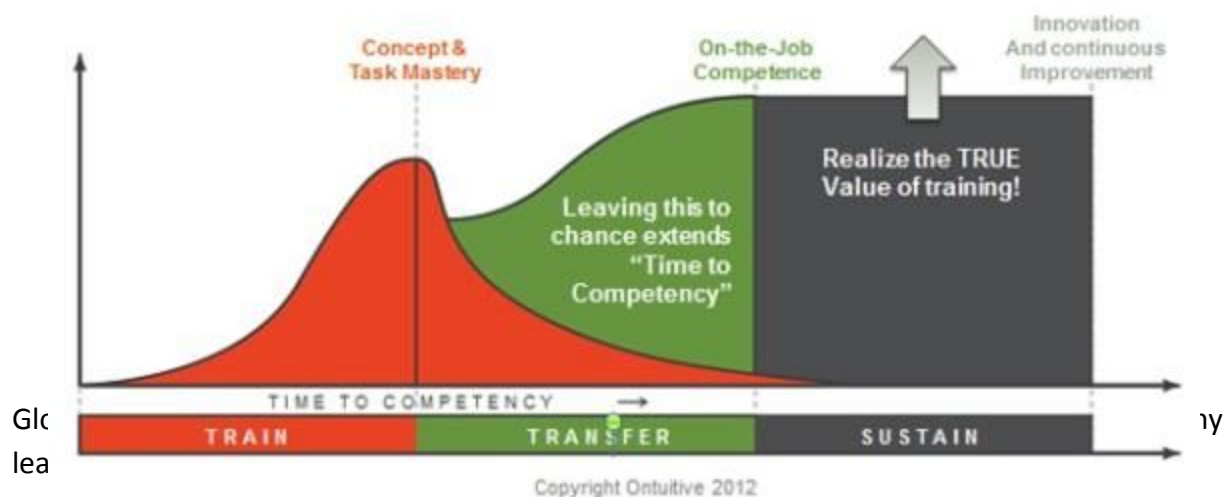
https://www.youtube.com/watch?v=Sflxm2GNc_o

Formal instructor-led training courses are historically the way employees have been trained at the Port from new employee orientation to compliance training. Managers present training classes this way and learning and development departments have evolved out of this system with adult learning professionals hired to instruct leadership and new management courses.

Formal training courses are a great way to get people together to build relationships, give each other feedback and discuss common problems. However formal workforce training can be problematic with regard to effective training of procedures and tools:

- Training done in a classroom is often presentation-style, involves little or no practice and is out of context of the work situation.
- A large percentage of what is learned is quickly forgotten after a learning “event”. The employee is not able to recall the information at the moment they need to apply it.
- We are good at training people, but transferring that training to knowledge workers can use to competently perform their job and then sustaining the knowledge so employees are performing consistently and efficiency is a process the learning and development department does not support and is left up to individual employee to sort out for themselves on a daily basis – *see figure below from Ontuitive.*

How well are we sustaining competency in an ever-changing work environment?



people's arrival at that moment? There are two contexts for doing this: in courses, or while working. Courses lack authenticity as they are separated from the work context." (1995)

Training, learning and development departments know how to teach formal training classes, but do not have a history of reorganizing or guiding informal learning to be more effective for employees. If informal job aids or support is developed at all it is usually by a forward thinking administrative assistant in a department or the purchaser of a tool in the IT department. These individuals have little or no background in assessing performance needs and building, scaffolding and organizing tools to support employee efficiency.

THE INTERVENTION

Performance support tools, specifically electronic performance support, could help reinforce and extend formal training classes as well as providing support to employees who are unable to attend classes. These tools can help fulfill the business need of increasing efficiencies and reducing wastes, continually improving on the job knowledge leading to more consistently high-quality performance and savings of both time and money to the organization.

What is Performance Support?

The term Performance Support can be difficult to explain and communicate not only to executives but to other learning and training professionals. I have often found colleagues blankly staring while shaking their head in agreement about what I'm proposing. The term itself poses a problem in that it sounds like other HR terms.

In his article Five Reasons to Use Performance Support from Learning Solutions magazine (2013, July, 9), Mark Rosenberg uses this simple definition:

Performance support is a tool or other resource, ranging from print to technology-supported, which provides just the right amount of task guidance, support, and productivity benefits to the user, precisely at the moment of need.

There are many variations of this definition, just as there are many variations of performance support types.

Mark goes on to describe some common examples of performance support we use in our daily lives such as a recipe, assembly instructions, an online information resource such as Wikipedia or an online tool which helps us make a decision.

How Do We Go About this Change?

Even if colleagues do understand, it can feel threatening to a training professional's knowledge and skill. It can also offend some people on a deeper level. They may picture a rather distasteful robot-takeover future where we don't need to know anything anymore, we just look it up.

Performance support may be the missing link needed to help employees complete key tasks and processes more efficiently by providing help they need at the moment of applying the information: within their workflow. But how do we make this change? It involves a cultural shift and requires more than the money and know-how to buy new software and build new systems (which is enough of an undertaking on its own!). It means a shift in the way the learning function views itself within the organization. It will also require an enterprise-wide team to build, catalog, and link resources so employees can find what they need quickly and efficiently. This is work that has not historically been seen as a function of the learning and development department, but rather left to a few departments with smart administrators or occasionally by IT after a new software implementation.

To be successful, one rule of thumb among performance support experts is that relevant resources must be able to be located and accessed easily and quickly (preferably within 2 clicks or 10 seconds).

Moving to a Port-wide system of performance support solutions will help reinforce the current structure of instructor-led courses and self-paced e-learning courses already available and assist all employees in doing their work more effectively.

Implementing Performance Support Systems:

In my change proposal I identified two areas of importance in implementing performance support.

1. Learning professionals at the Port must understand performance support and be convinced of the value it will bring both to their position within the organization and to meeting the organizations strategic, long-term goals.

2. Pilot projects will need to be identified, agreed upon, and implemented

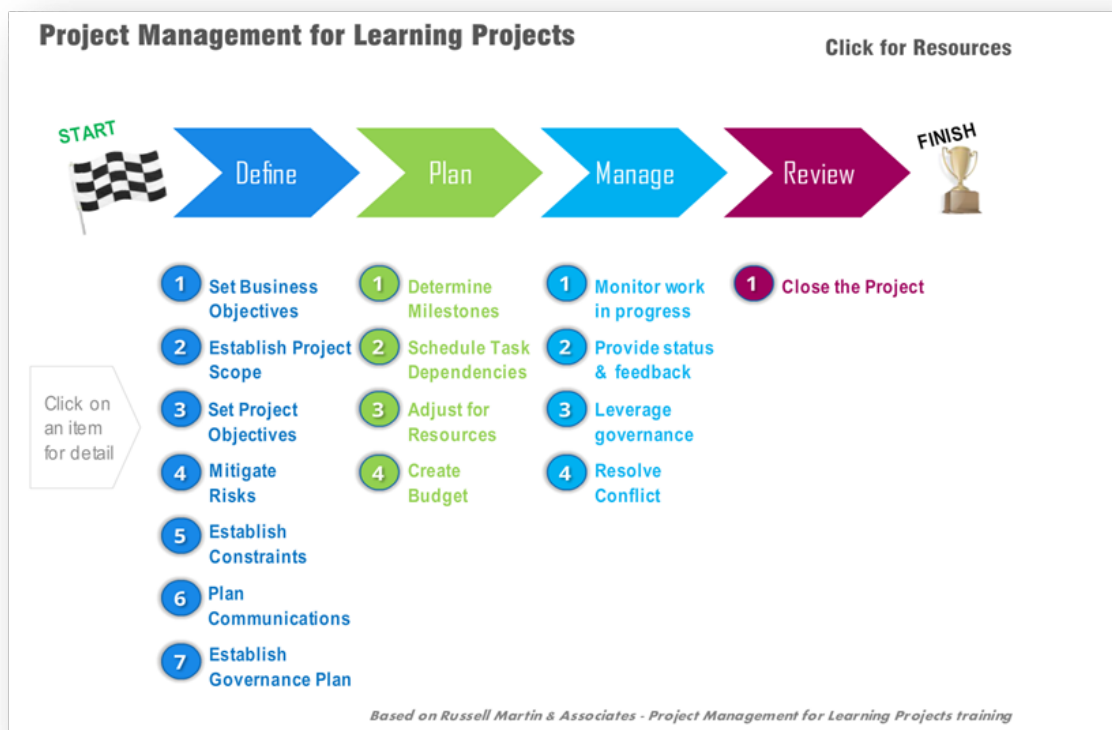
Initially, my manager agreed to carve out money from our 2015 budget for a Performance Support Consultant to help us get started analyzing our current systems and environment, and to advise us on best steps to begin implementing performance support within our organization. I thought bringing someone in with a history of experience and expertise in this field would make it easier to convince other learning professionals that this is an important and constructive change. We met with one of the professionals from Ontuitive and initially planned to hire them for this project. However, when it came to contracting and getting the money, my manager changed her mind and decided this wasn't what our department needed. She instead asked me to find a Project Management course focused on learning projects for the learning leaders at the Port to take together.

Initially I was very disappointed and felt this was a huge setback with my change project, but then I realized I could use this class as a pilot performance support project which I could offer to learning professionals attending the course so they could have a first-hand experience of how performance support can reinforce and support instructor-led training.

Especially when my biggest proponent showed that even she was not convinced of the value of performance support, it became apparent to me that the two areas I initially identified must go hand in hand. The way to convince and educate colleagues in the value of performance support was to create small valuable performance support pilots for use by learning professionals that they will use to see firsthand how this type of product can increase their own efficiency.

PS Pilot #1 – Project Management for Learning Projects Support Tool

I was able to bring Lou Russell to Seattle and developed an interactive tool to support methods and materials from her class which I housed on our department SharePoint site and offered to all employees who attended the class. It contains not only steps she described in managing projects, but also links to worksheets and other resources on the topics.





















Link to Interactive Performance Support module:

<https://3841ccb587c3e2753e245e915c3e14e79add861e.googleusercontent.com/host/0B6F3Bd9-rjScTnJRWG51UFlnOGc/>

PS Pilot #2 – PortTube – A place to find help for everything at the Port!

Another group of individuals whose power I realized I could harness is the ASAP group, an affinity group of Administrative Professionals at the Port. My goal was to gather existing job aids together in one highly searchable location and also encourage production of youtube-style 2 minute-type of screencasts on Port how-to topics in the same list. This list is highly searchable and includes a rating system which will bring more popular resources to the top of the searched list. In addition, employees can search and “follow” screencasters whose products they like.

These employees are some of the most tech savvy individuals at the Port. They are individuals who are constantly producing artifacts of this type and helping other employees make their jobs easier. They are also often people trying to show their value and increase their visibility for promotions. Porttube can serve not only as a vehicle to help all employees locate help in one place, but to reward and bring attention to excellent work done by motivated administrative professionals.

Port TUBE				
<input type="checkbox"/>	Type	Name	File Type	Rating (0-5)
		Project Management for Learning		
		bersin_virtual_onboarding_for_today's_global_workforce(10)	pdf	☆☆☆☆☆
		Community Giving Charity Enrollment JOB AID	aspx	☆☆☆☆☆
		CPR and Stayin' Alive - 2 min video	aspx	☆☆☆☆☆
		Create Project Schedule - dashboard	jpg	☆☆☆☆☆
		D. Cahoon Project Plan	jpg	☆☆☆☆☆
		Determine milestones and tasks	jpg	☆☆☆☆☆
		Document Constraints Worksheet	jpg	☆☆☆☆☆
		documenting risks and constraints	jpg	☆☆☆☆☆
		establish communication plan	jpg	☆☆☆☆☆
		Establish Scope blank worksheet	jpg	☆☆☆☆☆
		Intro to Windows Live Movie Maker - 2 min video	aspx	☆☆☆☆☆
		IRACIS Develop Business Objectives	jpg	☆☆☆☆☆
		lean_learning_-_what_performance_support_can_learn_from_the_lean_manufacturing_revolution	pdf	☆☆☆☆☆
		Learning Objectives Builder Tool	aspx	☆☆☆☆☆
		Learning Technology Community Mind Meld - A google + site	aspx	☆☆☆☆☆
		MakingGoodOnTheCorporateMOOCPromise	mp4	☆☆☆☆☆
		P-Card Purchases - Resource Site	aspx	☆☆☆☆☆

EVALUATION

Initially the reaction to my efforts of performance support have been overwhelmingly positive, however evaluation of these small performance support pilots will take time. Initial success may seem promising, but real success will depend on whether long-term culture will change to accept these types of tools as an important part of learning and development support systems.

SharePoint tracks usage of pages so I can fairly easily track how much use each system is getting, which will most likely be the most important sign of success. I can also send surveys and do interviews with users to receive feedback on improvements to be made.

I will continue to evangelize about the value of performance support and hope to see the Port implement a much larger scale performance support system such as the off-the-shelf integrated electronic performance support tool by Ontuitive for software such as shown in the youtube video below for Office 365.

<https://www.youtube.com/watch?v=RCNSbEnio10>

As more helpful performance support is made available to employees, employees will begin to look to and expect these tools as necessary devices needed to do their work successfully. If successful, we will arrive at a point in the future where employees consider performance support tools the quickest avenue to getting an answer rather than spending the day searching, asking others or waiting for a training course to get information. Employees will expect and demand this type of support.

This is an important time in the life of the learning and development department and I hope that I can be an agent to help our department continue to stay relevant and make a difference in employee productivity. If the learning and development function does not change it will not survive.

“In the future training will either be strategic or it will be marginalized.”

Gloria Gery

Marc My Words: Five Reasons to Use Performance Support by Marc Rosenberg : Learning Solutions Magazine. (2013,). Retrieved November 21, 2015, from:
<http://www.learningsolutionsmag.com/articles/1200/marc-my-words-five-reasons-to-use-performance-support>

Types of Electronic Performance Support Systems: Their Characteristics and Range of Designs by Deborah Alpert Sleight (1993) Retrieved November 19, 2015, from:
https://www.msu.edu/~sleightd/epss_copy.html

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<http://www.learningsolutionsmag.com/articles/934/were-lost-but-were-making-good-time-performance-support-to-the-rescue>

Electronic performance support systems: how and why to remake the workplace through the strategic application of technology by Gloria Gery (1995)