



Records and Information Management Training for the Masses

From Classroom to Online

Presented by
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Today!

Agenda

- ▶ Background information
- ▶ Steps to Developing Online Training
- ▶ Examples
- ▶ Resources

Learning Objectives

- ▶ Understand the tools of online training
- ▶ Steps to develop an online training session
- ▶ Resources for online training

About Seattle

- ▶ 12,000 + employees
- ▶ Employees throughout Seattle, North Bend, Skagit River, and Pend Oreille River.
- ▶ Hydro-power utility with 800, 000 of customers; 317 miles of circuits
- ▶ 7 dams, 149 bridges, and 4,000 miles of road way
- ▶ Employees on 24/7 hour schedule

Classroom Sessions

- ▶ New Employee Orientation (10 minutes)
- ▶ Introduction to Records Management (60 minutes)
- ▶ Email Management (90 minutes)
- ▶ Sending Records to Storage (60 minutes)



Employees Trained-Classroom

- ▶ 2019:
- ▶ 2018: 240
- ▶ 2017: 176
- ▶ 2016: 234
- ▶ 2015: 196
- ▶ 2014: 675* (Email Migration project)



Online Courses

- ▶ Introduction to Records Management (approximately 30 minutes) version 6
- ▶ Email Management (approximately 20 minutes) version 10
- ▶ Email Management-Police version (approximately 15 minutes)
- ▶ Managing City's Records and Information (Developing)

Business Driver

- ▶ Email Migration Project
 - ▶ 2015-2016 Email Archive platform was changed
- ▶ Increase RIM Knowledge at the City
 - ▶ City employees that are on 24/7 schedule or distance can't receive RIM training in Seattle.
- ▶ Online modules would service clientele better!



E-training Software

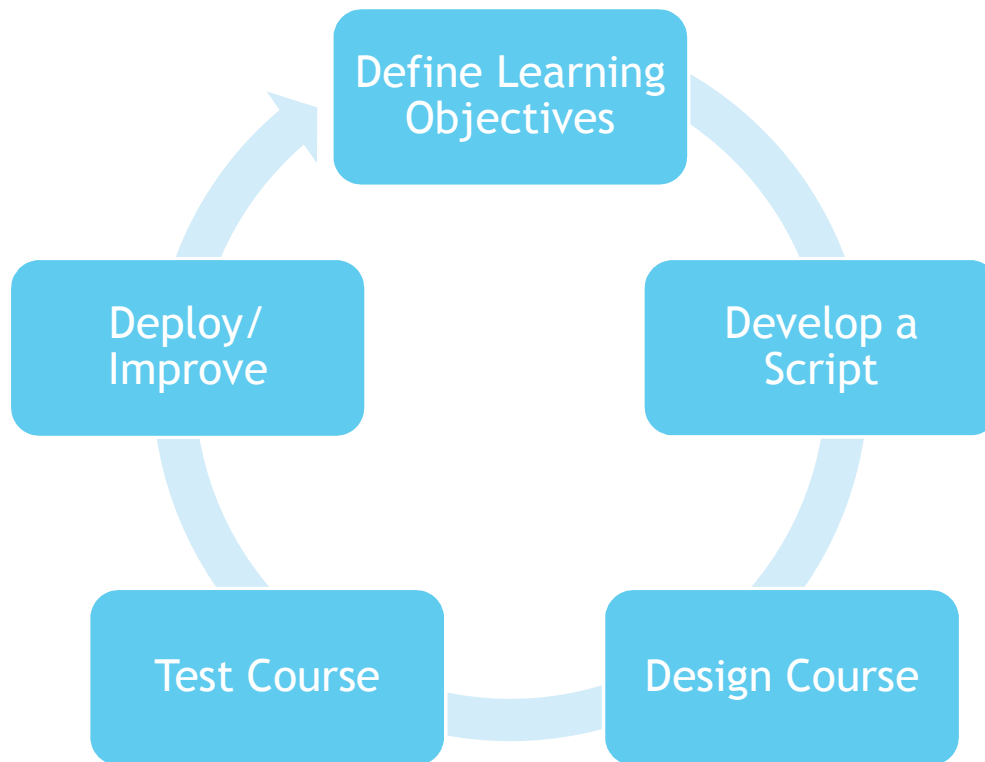
- ▶ Articulate Storyline 3
- ▶ Articulate 360
- ▶ Camtasia
- ▶ Adobe Captivate
- ▶ Many more!



Software - Accessibility: Section 508 Guidelines

- ▶ Close Captions for Narrations of Videos
- ▶ Use Tables to Organize text for screen readers
- ▶ Customize the Tab Order for non-mouse users
- ▶ Add Alternative Text to Slide objects to describe action or activity
- ▶ Customize Text Labels for Screen Readers
- ▶ Change the Player Font Size

Steps for Developing Online Training



Learning Objectives

Definition: Statements that define the expected goals of a course or lesson OR knowledge that will be acquired by a learner after completion of curriculum.

- ▶ Develop Learning Objectives
- ▶ Ensure content aligns with learning objectives
 - ▶ No superfluous content
- ▶ Make sure quiz questions are answered within training and align with learning objectives.

My Tips!

- ▶ Upfront decide what are the most important points of the course.
- ▶ Keep it to three to five objectives.
- ▶ Pay close attention during the testing phase: make sure Learners perceive the quiz questions are answered within training.
- ▶ Management agreement!

Develop a Script

Definition: A script is detailed outline of the Online Course.

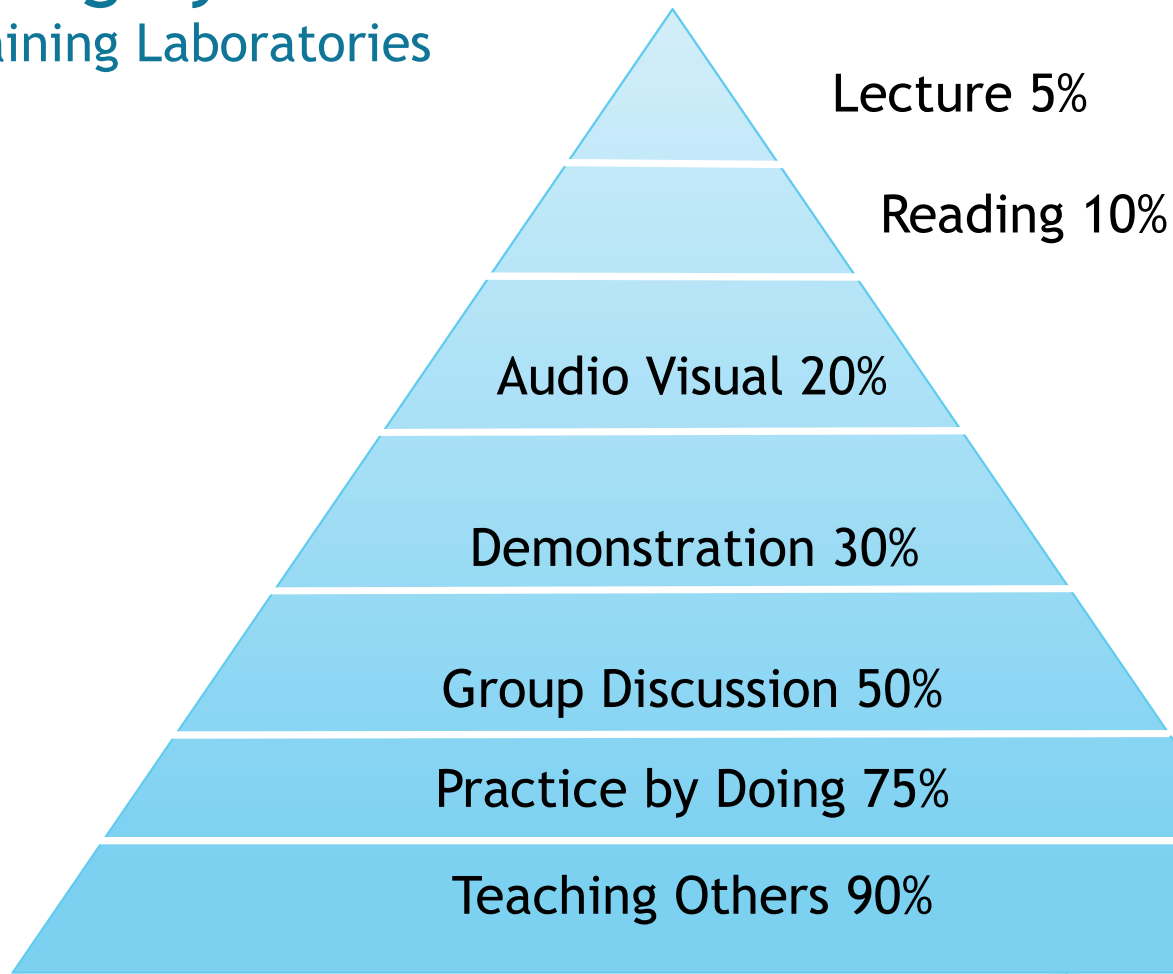
- ▶ Script outlines the course step by step.
- ▶ Provides text, important points, and themes of the course.
- ▶ Indicate actions of Learners in the course.
- ▶ Include outline of games or activities to enforce learning objectives.
- ▶ Review/Include supplementary materials-handouts.

My Tips!

- ▶ Make sure all team members review the script.
- ▶ Diverse group of reviewers.
- ▶ Consider activities upfront and develop them.
- ▶ Some groups may need different activities within your organization.
 - ▶ Such as Utility, Police, Legal, etc.
 - ▶ TMS can identify Learners by department.
- ▶ Use current classroom presentation as foundation.
- ▶ [Script example](#)

Training Pyramid

National Training Laboratories



Design Course Creation

Definition: The act of creating and designing the online course through an e-learning tool.

1. Keep training under 30 minutes
 - ▶ Overall training and many sub modules
 - ▶ Limited outside links
2. Use clear and concise language:
 - ▶ RIM jargon to a minimum
3. Convey ideas with images
 - ▶ Is an image worth a 1000 words?
 - ▶ Videos for show and tell
4. Include Interactive options:
 - ▶ Drag and drop, flash cards, matching, hotspot, etc.
 - ▶ Audio track ?—No, only 5% retention.

[Design Course Examples](#)

Design Course: My Tips

- ▶ Have a solid current classroom presentation than import into e-learning tool as a foundation.
- ▶ Tone and cultural fit: Race, Social Justice and/ or International issues.
- ▶ Use Gaming or Interaction to instruct Learners:
 - ▶ File it/ Trash it; Sorting; Matching or Drag/Drop
 - ▶ Hot spot; Pick Many, Sequence of events, etc.

Test Course



Definition: Analysis of learning course to make sure it meets all learning objectives and session is functional.

- ▶ Alpha Test Group: Course Designers, Partners and Co-workers.
- ▶ Beta Test Group: Select group of testers i.e. champions.
- ▶ Online Feedback: Review regularly to determine errors of improvements.

Testing: Alpha Test Group

Alpha test group: Course Designers, Partners, and colleagues

- ▶ Tested through temporary site and sent message with evaluation tool.
- ▶ Completion Time?
- ▶ Evaluation tool asked for specific feedback:
 - ▶ Was navigation throughout the presentation was clear?
 - ▶ Was Training clear and well organized?
 - ▶ Unfamiliar technical terms were defined?
 - ▶ Ask of each slide if it didn't read well, typos, or grammar errors..

My Lessons Learned

- ▶ Adjusted and clarified navigation issues.
- ▶ Reduced fancy text usage (fly-ins).
- ▶ Removed images that served no purpose.
- ▶ Identified trouble spots and corrected.
- ▶ Clarified language to simplest level.
- ▶ Use images as buttons to lock the lessons.

A large, stylized blue Greek letter alpha symbol (α) is positioned in the bottom right corner of the slide, set against a background of overlapping blue geometric shapes.

Beta Test Group

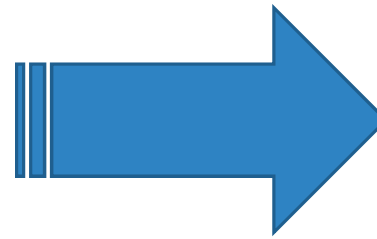
- ▶ Beta version should be 95% complete
- ▶ Beta test group-Records Coordinators/ Champions
 - ▶ Loaded to Talent Management System (TMS) with evaluation
- ▶ Beta group received credit in the system
- ▶ Online Evaluation asks for specific feedback
 - ▶ Similar evaluation questions
 - ▶ Evaluation is part of the TMS
 - ▶ [Test Group Evaluation Form](#)

A large, bold, black Greek letter Beta symbol (β) is positioned on the right side of the slide. It is set against a background of overlapping, semi-transparent blue geometric shapes, including triangles and polygons, creating a modern, abstract design.

Deployment

Definition: Distribute the completed online course to the organization.

- ▶ Training was loaded to the Talent Management System (TMS)
- ▶ RIM course available to all City employees
- ▶ TMS reports on completes and incomplete
- ▶ Market to HR staff, Records Coordinators, and Managers
- ▶ Part of email migration encourage to take the course



My Tips

- ▶ Market to HR staff, Records Coordinators, and Managers
- ▶ Promote to select groups: IT, HR, etc.
- ▶ Include at the end of your emails.
- ▶ Advertise on inWeb, Blog, or other training notice locations.
- ▶ Training Flip: Online session and then Q/A.

Improve: Gather Feedback

- ▶ Regularly check feedback forms for any issues with the course.
- ▶ Check in with management to make sure policies or systems have not changed.
- ▶ Review slides biannually for updates or improvements-you will find them!
- ▶ [Online Evaluation Tool](#)

Improve!

Employees Trained Online

Email Management

- ▶ 2017: 134
- ▶ 2018: 44
- ▶ 2019: 65 Targeted Announcements
- ▶ Jan-March 6, 2020: 13
- ▶ March 9-April 8: 43

Intro to Records Management

- ▶ 2017: 87
- ▶ 2018: 42
- ▶ 2019: 46
- ▶ Jan-March 6, 2020: 16
- ▶ March 9-April 8: 22

Target 1200 completions
10% of employees

My Overall Lessons Learned

- ▶ Moving to the Online training format takes time!
- ▶ Internal cultural issue—City employees don't like online training-at present.
- ▶ Scripting-you might want to avoid, but don't this is great planning tool!
- ▶ Make it interactive and fun!

Online Training Examples

- ▶ [Example of Script](#)
- ▶ [Design Course Examples](#) (Link expires 5/14/20)
- ▶ [Test Group Evaluation Form](#)
- ▶ [User Online Evaluation](#)

Resources

General

- ▶ LinkedIn Learning
 - ▶ Articulate Storyline
 - ▶ Camtasia
 - ▶ Adobe Captive
- ▶ [eLearning Brothers](#)
- ▶ [Online Learning Consortium](#)

} Active
Community
Groups

ARMA International

- ▶ [How to Deliver RIM Training That Really Works](#) (Free)
- ▶ Generally Accepted Recordkeeping Principles Maturity Model

Contact Information

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