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 roadway
- 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

1. Define Learning Objectives
2. Design Course
3. Develop a Script
4. Test Course
5. Deploy/Improve
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

Lecture 5%
Reading 10%
Audio Visual 20%
Demonstration 30%
Group Discussion 50%
Practice by Doing 75%
Teaching Others 90%
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: 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.
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](#)
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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