

Professional Development in Tough Financial Times

Tight budgets do not mean giving up professional development opportunities, although they do demand some creativity

By **Paul B. Gandel** and **Cynthia Golden**

Meetings with colleagues have taken on a decidedly pessimistic tone lately as conversations quickly turn to budgets. Like parents who tell their children how much harder it was for them when they were growing up, we too have our “I had to walk five miles to school, uphill both ways” stories to share. Each tale of budget woe is now automatically followed by another tale of even more dire woe. In fact, our meetings are beginning to resemble the old television show “Queen for a Day.”

For those too young (or too old) to remember this reality television pioneer, its premise was quite simple. In each show, four women told their tales of woe to Jack Bailey, an ex-carnival roadie from Iowa, and a live studio audience hooked to an applause meter. The tale (and woman) considered most pitiful—measured by the applause meter—was crowned queen-for-a-day. The queen might receive her requested iron lung for a sick son, as well as a mink coat and a new washer and dryer. “Queen for a Day” was a leader among tasteless television shows of the 1950s.¹

While some of us might consider honoring our tales of woe for the day when Fox revives “Queen for a Day,” it’s clear that we need to learn how to operate within the tight fiscal constraints that are with us for the foreseeable future. First on the chopping block are often professional development activities, though it is these same professional development activities that maintain the foun-

dation of a learning organization—one that can work smarter and be more efficient. Likewise, it’s professional development that can help leverage limited resources by breaking down organizational barriers through improved understanding and communication.

How then do we maintain a vigorous and active professional development program when campus administrations are under pressure to cut travel, conferences, workshops, and other “nonessential” expenses from budgets? Do we plan to have our staffs hitchhike to and camp out at the next annual EDUCAUSE conference? Or do we play our own version of queen-for-a-day by arguing for more funds from our presidents, provosts, and CFOs?

Well, nobody said it would be easy. To explore other options, we asked a diverse cross-section of our colleagues how they are addressing professional development in tight economic times, when we are all being asked to work more effectively across organizational boundaries.

While our survey was informal and not scientific, we found that many organizations have maintained strong professional development activities despite budgetary pressures. Most of the ideas suggested in this article are not new. Nevertheless, we thought it would be useful to summarize and share these ideas as both a reminder of what is possible and a reaffirmation of the incredible creativity and commitment our profession has demonstrated over the years to professional development, even when

the funds to support these activities have not been as available as we would like. We’ll take a look at the following approaches:

- Find out what’s going on in your neighborhood, specifically trade shows and conferences.
- Look around your own campus for existing events.
- Initiate “home schooling” by bringing classes to your campus instead of sending staff elsewhere.
- Request help from friends by networking with nearby institutions.
- Turn routine staff meetings into professional development opportunities. They don’t have to be boring.
- “Do lunch” with brown-bag lunch meetings and other informal gatherings.
- “Walk a mile” in another staff member’s shoes to broaden your horizons.
- Involve the community.
- Provide special orientation programs for new staff members.
- Take advantage of Web broadcasts.
- Expect the unexpected, and be ready to take advantage of opportunities as they arise.
- Make time for your personal professional development.

In Your Neighborhood

Taking advantage of local trade shows and conferences was the most popular solution offered. Local events avoid hotel and travel costs, and many vendors will offer complimentary admission to these events.

Additional professional development benefits can be reaped by planning for these events as a group. For example, staff can be organized into teams to cover particular topics or areas to make everyone's time spent more effective and worthwhile.

Attending a local trade show or conference can also be a catalyst for organizational as well as personal reflection if you hold formal or informal staff discussions after the event. Discussing how to apply what staff have learned can prompt rethinking of existing structures and processes.

At Home on Campus

Of course, it's not necessary to wait until a conference or trade show comes to your neighborhood. For years, campuses have held their own on-site technology fairs and conferences. Holding your own conference enables you to gear the event directly to your institution's needs.

Campus events are often designed to educate faculty and the rest of the campus about IT, but they can just as easily serve as a professional development venue for IT staff. Campus events are an excellent way to build staff pride in a unit's accomplishments and to share information across the entire institution. These events also offer additional opportunities for staff to improve their communication and presentation skills. Moreover, they provide an opportunity for self reflection and self improvement of individual skills and knowledge.

Ron Bleed, Associate Vice Chancellor of the Maricopa Community College System, pointed us to his institution's "visioning forums," which bring a series of distinguished professionals to campus to examine aspects of instructional technology and facilities for learning. Each of the campuses participates in the forums as a team, and they meet at a year-end retreat to develop plans for the future.

Home Schooling

Bringing classes or workshops to your campus may prove to be not only cost-effective but also an efficient way of offering professional development opportunities to your staff. In addition to

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avoiding large travel costs, bringing these events to campus has the added advantage of enabling more staff to attend.

A "train the trainer" approach also offers some great benefits, both fiscal and operational. That is, one staff member attends the seminar or workshop with the understanding that, having learned the material, he or she will be responsible for teaching the same material to other staff members. Not only is this approach cost-effective, it also reflects current knowledge in effective learning—those who can teach what they know have deeper knowledge of the content they teach.

Help from Friends

While the first three suggestions are important components of a strong professional development program, typically they do not provide opportunities for staff to meet and exchange information with colleagues at other institutions. The opportunity to network with colleagues is a chief reason to attend national and regional professional conferences. Unfortunately, the expense often limits the number of staff members who can attend these events—even in good financial times. Therefore, an inexpensive way to create opportunities for your staff to network with colleagues is simply to arrange visits to nearby institutions.

Professional visits to nearby institutions need not be highly orchestrated affairs. They can be very successful as simple, free-wheeling discussions where everyone has a chance to share ideas and concerns and to suggest solutions to problems brought up by others. In other words, everyone gets a chance to tell

colleagues "what's happening at my place" and to hear "what's happening at their place." Such dialogues are effective ways to gather good advice from colleagues, to build pride in one's own accomplishments, and to begin to develop a network of fellow IT professionals to call on in the future.

Multipurpose Staff Meetings

The ideas discussed so far pertain to special events or activities. However, routine meetings can be turned into professional development opportunities as well. For example, formal staff presentations at meetings offer an excellent way to share information and improve organizational communication. Such presentations both inform the team and break down organizational boundaries by creating a forum to discuss projects and issues facing all areas of the organization. Moreover, staff meetings can be used as a venue for conference-goers to report back to colleagues who could not attend.

Outside speakers can also be an effective strategy for staff meetings. Colleagues working nearby are often willing to come and speak as a professional courtesy and for the price of a good lunch. Even paying a modest honorarium and travel expenses for an outside speaker is still a cost-effective method of introducing issues and ideas into the organization and generating discussion among staff.

When thinking about "outside" speakers, recognize that the old adage "an expert is someone 50 miles away" is not necessarily true. Inviting your president, provost, CFO, or deans to share their ideas and concerns with the staff can be a mutually rewarding experience. Knowing where your president plans to take the university, understanding the financial rules that a CFO must operate within, or hearing the plans a dean has for reenergizing or reorganizing his or her college can be very enlightening. Staff learn about the key issues facing the institution and the needs of their administrative customers, while administrators gain insight into the issues and concerns of the very people helping them to accomplish their objectives.

Doing Lunch

Formal meetings are not the only vehicle for encouraging information sharing throughout your organization, of course. The “brown bag” lunch has probably been around longer than the brown bag, yet it remains a highly effective mechanism for encouraging staff members to get together and discuss projects or to give reports on recent conferences or workshops. Known at one institution as “Lunch Bytes,” a collaboration between the faculty development and IT staff, this gathering provides opportunities for staff and faculty to present and discuss current work and for anyone on campus to learn about new ideas and initiatives. Informality is key here, and the ability to “drop in” on an occasional or regular basis creates an inviting and casual atmosphere.

Another way to encourage informal information exchange, suggested by Gene Spencer from Bucknell University, is to create a resource library and encourage staff to use the resources as well as meet informally to discuss these materials. Spencer also encourages the creation of “reading groups,” much like “journal clubs,” where staff get together to read and discuss a particular article or book that is germane to issues being faced by the organization or group.

A Mile in My Shoes

Spencer, along with a number of other CIOs, also suggested that an excellent way to broaden everyone’s horizon as well as improve understanding and communications between departments is to have staff members spend regular time helping out in another area. This type of IT “job swap” can last a day, a week, a month, or even as little as a few hours every month. During a reorganization, for example, a program like this can be especially important for building bonds and improving understanding between areas. (The obvious example that comes to mind is trying to integrate libraries and IT organizations.)

“Job swaps” can also be effective tools for any areas that need to work closely together; for example, help desks and application support groups. In fact, it’s not unusual to find that many success-

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ful help desks have programs where all IT staff regularly spend at least a few hours on the help desk so that there is a smoother escalation of helpdesk problems to other members of the IT staff.

Community Involvement

There is more to professional development than having staff improve within their own areas of expertise. When budgets are tight, it is critical for IT and information services staff to understand the issues and concerns of the broader community they serve. Jim Neal, from Columbia University, works to place his IT and library staff on a broad range of university committees and task forces—some of which do not address technology or library issues. Participation in university-wide activities not only serves to build better bridges between staff and the university community, but it also helps staff develop skills and assume broader leadership roles within higher education.

The importance of undertaking broad leadership roles was made very clear to author Paul Gandel earlier in his career as CIO at Ohio University. He was asked to lead the university’s vice presidents, deans, department chairs, and other university administrators in a university-wide strategic planning process. To facilitate this planning process, he asked members of his technology staff (at all levels, not just managers) to be facilitators. When the plan was complete, everyone agreed that it was one of the most successful planning processes they had participated in. Why? Not because of the plan. The plan is probably collecting dust on a shelf. But rather it was because professional staff had worked

directly with university administrators in a meaningful way, addressing concrete concerns. In fact, IT staff felt that this was one of their most career-enriching experiences.

Orientation for New Staff

Getting to know other areas of the department, the division, and the institution can broaden a staff member’s understanding of the institution and help them perform better in their jobs. Opportunities for formal and informal orientations abound, and there is no better place to start than within one’s own organization.

Author Cynthia Golden was given advice long ago by Barbara Horgan, now deceased, who served in the capacity of CIO at several institutions. “On Fridays, I try to grab one of the staff for lunch,” she said. She noted that this can be an informal, relaxed opportunity for staff members to actually spend some time with the person at the top. For the CIO, it is an opportunity to get a little closer to the day-to-day life of the organization and to each person on the staff. In practice it worked well, once the word was out that lunch with the CIO wasn’t something to be feared, but rather an opportunity for interaction and discussion.

New staff members can have “get to know each other” meetings with the CIO and directors during the first few weeks of their employment. This helps break the ice, encourages good communication, and is easy to do. They should be formally scheduled as part of the orientation plan.

Many institutions offer formal orientations to the institution itself for all staff, along with workshops or events targeting specific groups that need to work together. In “merged” organizations, for example, providing IT staff with an orientation to the library functions, and giving librarians an understanding of IT, can help both groups be more effective in supporting the work of the institution.

At Rochester Institute of Technology, CIO Diane Barbour noted that her office has sponsored several development programs in the areas of communications and inclusion/diversity and has offered a series of deaf-awareness programs for IT staff required to work with a campus-

based institute for the deaf. These programs had minimal cost and helped build “deeper understanding and enhanced effectiveness across organizational units,” explained Barbour.

Web Broadcasts

As Web-based seminars, lectures, and other IT events increase in frequency, we have multiple opportunities to hear experts in the field “live and in person,” when before it was only possible to do so by attending a conference. An effective strategy is to arrange group viewing times so that discussion can follow the formal program. This not only helps build great communication and understanding among attendees and across operational areas, but can also lead to implementation of new projects and new ideas. Some campuses choose to schedule these events as open campus seminars, with facilitated discussion following the Webcast. For example, a Webcast on intellectual property and digital rights management would be an ideal opportunity to bring faculty, librarians, and IT staff together to discuss the presentation and exchange ideas.

Expecting the Unexpected

Skidmore College’s Bret Ingerman pointed out that not all professional development opportunities are initially

obvious or expected. He gave the example of the recent rash of computer viruses, which he said brought his staff closer together and facilitated more effective communication.

While crises are better avoided, it is important to recognize the professional development opportunities in effective crisis planning and management. Crises do typically bring out the best in people and are a wonderful opportunity to improve weak links in the organization and build team spirit when celebrating a crisis well managed.

Personal Development

In good budget times or bad, it is critical for staff to know that their own professional development is important—that it is actually one of their responsibilities. Creating an environment where this expectation is clear and where the right coaching and resources are available is key to the staff member’s success.

In addition to the suggestions offered above, some time should be allotted for personal exploration and growth. If staff members can regularly schedule a block of time to work on their own professional development by reading, experimenting, doing online research on a topic, or taking an online tutorial or seminar, the organization will reap the benefits.

No Excuses

All the ideas expressed here demonstrate that it is possible to have an ambitious organization-wide professional development program even in tight financial times. None of the ideas is extremely costly, nor do they need a lot of planning. More importantly, each idea suggested here can involve large numbers of staff and, when done right, can build strong communication links across organizational barriers.

The ideas suggested are only some of the many possibilities for creating low-cost, high-pay-off professional development opportunities. We’re sure each of you can come up with many more ideas. It has been said that the best way to communicate is every way possible. The same holds true for professional development. The real barrier is not funding—it’s not following the Nike tagline “Just do it!” To get this done on your campus, our friend Gene Spencer gave one more piece of good advice: form a professional development group to formally encourage and implement these kinds of activities. *e*

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Endnote

1. Credit for reminding us of this splendid piece of television history goes to Arnold Hirshon, Executive Director of the New England Library Information Network (NELINET), who actually did a wonderful reenactment of this classic show at NELINET’s recent conference.

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