Tailoring Professional Development for IT Staff

When it comes to professional development, one size doesn't fit all—a broad range of professional development activities better serves the institution

By **Christine E. Haile** and **Lisa Trubitt**

Professional development has become an increasingly important topic among IT professionals in higher education. But what does it mean to engage in professional development activities? How does an institution create an initiative that meets broad organizational goals while taking into account the specific needs of the individual?

Information Technology Services (ITS) at the University at Albany, State University of New York, is investing a great deal of time considering these questions. To answer them, one of the first steps is defining professional development in a way that is meaningful both organizationally and individually. Because the term resists a single definition, this might mean enlarging the scope of professional development to encompass a broader range of activities than ever before.

Background

The University at Albany is one of four university centers in the state university system. Three campuses are home to 10 colleges and schools, numerous research centers, approximately 17,000 students, and 4,400 unionized faculty and staff. With a staff of 130, ITS is the centralized provider of IT services; at least another 50 professional staff provide support locally in various colleges, schools, and centers. The chief information officer (CIO) has eight direct reports including five directors, an information security officer, and two assistants. This group, known as the ITS Cabinet, represents

the organization's executive management team. The next management tier consists of 17 assistant and associate directors who have supervisory responsibilities for the workforce.

The ITS management team meets several times a year to discuss a variety of organizational issues and concerns. Professional development was identified by the group as an area requiring its attention. The ITS management team decided to begin working on this initiative in late 2005. ITS employee demographics indicated bimodal distributions in the age of staff and dates of hire. The majority of ITS employees were under 35 or over 50; similarly, most were hired before 1986 or after 1997. There is generally low turnover among staff. The composition of the workforce reveals the organization's need to think about succession planning, as a cluster of retirements could create simultaneous vacancies across the organization.

The distribution of staff at various stages of their careers required the ITS management team to think about avenues of professional development that would accommodate a variety of needs, expertise, and aspirations. The ever-changing demands of technology and the needs of a diverse user community meant that the IT staff would have to acquire additional hard and soft skills in order to fulfill its commitment as a service organization.

Professional development provided the appropriate context for thinking about how ITS staff could prepare for growth while continuing to meet the needs of its constituencies. The ITS management team quickly recognized that a professional development program would need to establish a balance across three priorities: preparing staff for promotional opportunities, building technical expertise, and bringing fresh ideas to the organization. Examining

the characteristics of the workforce and establishing a framework for a definition and goals for professional development clarified the importance of creating a model that considered the needs of both the organization and individual staff.

Planning a Professional Development Program

The ITS management team had many discussions about defining professional development and looked at how the term was interpreted at many other organizations. After considerable research the team selected the definition adopted by the Institution of Engineering and Technology (see http://www.pd-how2.org/6_5.htm), an organization that encourages its members to engage in professional development throughout their working lives. Their definition follows:

The systematic maintenance, improvement, and broadening of knowledge and skills, and the development of personal qualities necessary for the execution of professional duties throughout working life.

ITS added the following statement:

It is the process which keeps us interested in our work, gives us the drive to progress our careers, keeps industry competitive, and, ultimately, makes us employable throughout our lives.

Finally, the team established that a professional development program should have the following critical success factors:

- Aligns with organizational goals
- Is fully supported by the organizational culture, including buy-in from all levels of management
- Is implemented with employee input
- Helps develop skills to support current technology
- Has a budget
- Should be structured, yet flexible
- Improves interpersonal skills
- Encourages professional growth
- Offers career-building certifications
- Is forward-looking

Upon adopting these principles, the management team created three small groups to collect information and best practices to formulate an implementa-

tion strategy. Team 1 examined the current state of professional development within ITS; Team 2 conducted an extensive inventory of skills and competencies across the organization and assessed what new jobs would be needed over the next five years; Team 3 identified best practices at other institutions.

Team 1

Team 1 conducted two surveys to measure perceptions of the current state of professional development in ITS. One survey was given to all staff, inquiring about their satisfaction with existing opportunities. Most staff reported feeling neutral to very satisfied; few were dissatisfied. The second survey asked ITS managers about their satisfaction with professional development opportunities available to staff. Managers reported lower levels of satisfaction with these efforts.

Both surveys revealed that the biggest impediments to professional development were time, money, and awareness. The surveys also revealed that managers had accurately identified the kinds of opportunities their staff would like to receive. (Prior to conducting the survey, it was not clear how accurately management assessed the types of professional development activities staff wanted.) It was also important for the organization
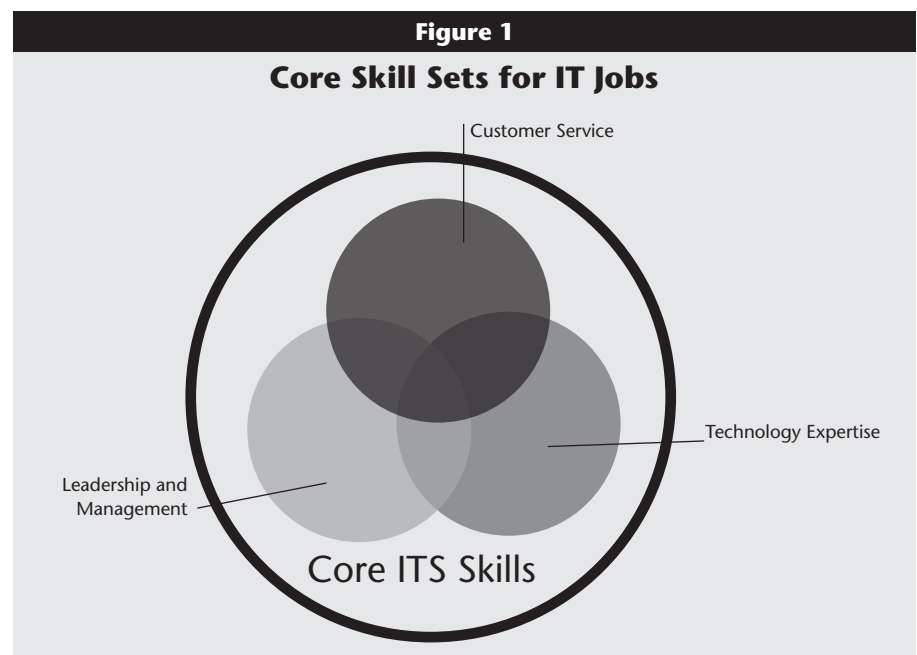
to recognize that professional development needed to become an established ITS priority in order to overcome its perceived impediments.

Team 2

Team 2 examined the state of the IT work force, including the current positions and competencies as well as those that would likely be needed in the next five years. They identified 62 current job types and estimated that 7 new jobs, requiring somewhat different skill sets, would be needed in the near future. They also identified a core set of skills that were common across all ITS jobs. These included functional competencies, technical knowledge, customer service, and leadership/management skills, visualized in Figure 1. The diagram is useful for identifying areas of strength and weakness, as well as focusing attention on areas needing professional development. Like so many other aspects of this exercise, assessing these skills can be done individually or at an organizational level.

Team 3

Team 3 looked at best practices for professional development within and beyond IT organizations, concluding that the process should be the joint responsibility of management and staff.

Figure 1

Core Skill Sets for IT Jobs

Customer Service

Technology Expertise

Leadership and Management

Core ITS Skills

In many cases, the practice is formalized by a written individual development plan (IDP) negotiated between a manager and an employee. These commonly include an evaluation of core skills, strengths, and weaknesses, and those results guide future professional development activities. The team recommended that ITS develop its own IDP for staff.

Goals and Agreement

Team findings and subsequent discussion resulted in an agreed-upon set of professional development goals for the organization:

- 100 percent staff participation
- IDPs negotiated between employees and their immediate supervisors; ultimately approved by their unit director and the CIO
- IDPs to be written into annual performance programs

The Office of the CIO met with Human Resources Management (HRM) to ensure that organizational professional development efforts were in keeping with university policy and union obligations. HRM endorsed ITS's idea to institutionalize a professional development plan for the organization. They recommended building the IDP into the current performance program and evaluation process to be consistent with union obligations. They also provided ITS with information on preexisting training and professional development opportunities available to all state employees.

The concept of an organization-based professional development program was presented at a full ITS staff meeting. Employees were given an overview of the preliminary work performed by the management team, along with the definition and goals for the initiative. As part of demonstrating organization-wide commitment, professional development efforts would begin at the ITS Cabinet level before being incorporated among the managers. Once the process is complete at the management level, it will be rolled out to the rest of the organization and tied to the current process for performance programs and annual evaluations.

The following case study demonstrates the development plan through the IDP process for Lisa Trubitt, ITS staff member and Assistant to the CIO. Trubitt is represented in the ITS demographic as a mid-career professional. A social scientist by training, her primary responsibilities include drafting IT policies, managing the governance process, and organizing and executing communication initiatives on behalf of the organization. A great deal of her time is spent on building relationships with customers and constituencies, as well as evaluating the success with which ITS conveys information to users on policies and broad communication issues. CIO Christine Haile initiated the IDP process.

Case Study: One Staffer's Experience

To create an IDP, Haile and Trubitt began by discussing Trubitt's professional goals in the context of building on the ITS core skills. They agreed that professional development activities for the annual performance program would focus on the area of leadership and management. Trubitt wanted to develop her understanding of organizational dynamics and communication issues in an academic setting, but wasn't sure what activity would best support those goals. Because her experience in higher education was confined to the University at Albany, Haile suggested she visit another institution.

Trubitt contacted Tracy Mitrano, director of IT policy and the computer policy and law program at Cornell University. After discussion with Mitrano, Trubitt proposed making three, three-day site visits to take an in-depth look at Cornell's handling of policy, communication, and information security issues. The proposal included formal and informal opportunities to engage with Cornell Information Technologies (CIT) staff. Both institutions reviewed and approved the proposal, which would conclude with a final report. The proposal process established the parameters and expectations of the visits for both institutions and now serves as a model for staff (at either institution) to pursue similar activities.

Trubitt anticipated that the professional development opportunity was to compare and contrast the way both institutions delivered services, their different management styles, and how they dealt with customers. Mitrano was interested in hosting learning opportunities for staff from other institutions and creating opportunities for information sharing and future collaborations.

Trubitt's interest in organizational dynamics meant she did not need to seek out particular programs or services, although the visits could have been structured to accommodate specific learning objectives. To achieve depth and breadth, it seemed logical for her to invest time in deeper visits at a single institution rather than visit multiple campuses and have less opportunity to fully engage with staff.

Despite demographic and resource differences between Cornell and UAlbany, both organizations deliver a comparable range of services and share a number of the same challenges and concerns in provisioning IT services to their respective user communities.

Trubitt describes this professional development activity as yielding far more growth than she anticipated and a turning point in her career. She gained a level of objectivity not possible at her home institution, where she often has an agenda. She was able to think about customers and service delivery with a level of independence from her normal routine and had time to think about different ways to address areas in her organization needing improvement. She was also motivated to explore new ideas upon her return. The site visits produced not only the expected growth of leadership skills but also bore fruit for the rest of the core skills that comprise UAlbany's professional development initiative.

UAlbany's return on investment paid dividends to both institutions. Trubitt debriefed the ITS Cabinet on her concentrated experience at another campus and encouraged other ITS staff to engage in similar activities. CIT staff enjoyed a unique opportunity to reflect on themselves, according to Mitrano. "Any time one is asked to talk about what they do in a self-conscious way, there's an oppor-

tunity to learn something," she said. "To be able to do that with someone who is thoughtful and looking for comparisons adds to the opportunity for knowledge and collaboration."

In retrospect, Mitrano and Trubitt agree they should have made provisions for Trubitt to give a presentation to Cornell staff. This could have been a prepared discussion on a topic selected by CIT or an informal chance for her to share with CIT staff what she gained from the experience. Plans are in the works for this kind of meeting, although both agree it would have had greater impact during the visits; it also would probably have influenced the final report. Both Trubitt and CIT could learn from each other and benefit from the collaboration.

CIO Haile views this initiative as a success. "I'm very pleased with the growth in Lisa," she said. "The model of these in-depth visits is not only effective but also very affordable."

Conclusions

Professional development can—and should—mean different things for different people. This is one reason why defining the terms and range of activities is so important. Achieving breadth and depth of professional development across an organization is as important as individual growth, particularly as IT organizations find they need to expand their skill sets to better serve the ever-changing needs of their customers. We believe the framework developed as part of this exercise can be structured to accommodate different goals and objectives, and efforts are under way to expand the framework to additional ITS staff.

While UAlbany has successfully launched a professional development initiative, the process is still young. Challenges are to be expected among both individual and organizational efforts. No doubt ITS will need to address many issues as we work to attain the desired 100 percent participation. As the initiative is rolled out to the full staff, ITS also must overcome the constraints of time, money, and awareness and instill the concept that the process is ongoing and iterative. Staff are expected to engage in this process throughout their careers at the university.

Early efforts have been promising. Attendance at professional conferences and training have increased, along with participation in Webinars and online learning activities. We hope the combination of written commitments and new expectations across the organization will help professional development efforts flourish for many years to come. *e*

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