I attended the annual Association for Institutional Research (AIR) Forum in May 2018. Many of the sessions were interesting and full of new information I am going to implement in my role as a Research Analyst for Institutional Research and Assessment at Lincoln University, but going into great detail about those sessions is not useful to the average LU employee.

Since the OIRA office at LU is very small with only two employees, one of the sessions I attended was about cross training and process documentation presented by Dave Chase, Jacob Mayiani, and Christopher Orem, from James Madison University. Since many other offices at LU are small and as employees come and go, this summarized information will hopefully be useful to them.

The first thing to note about this is the office in question at the session was large, but they had one goal for an entire year to do this for the office after an employee left and they were in a bad spot for a large report. Time must be carved out for this to happen for the employee cross training and writing the process documents. This must be an intentional office priority and regularly evaluated for overall office progress.

OIRA offices have many recurring and mandated reports that must be completed each year, but it is easy to forget the process from year to year, and more so if the task is passed on to another colleague and later brought back to you. Process documentation can be done in hard copy or electronically, whichever will fit your office's situation best is preferred, but it will need to be updated regularly as reports change and update. When filing these process documentations, a naming convention must be established by the office for consistency's sake on or in a location that all employees have access to (shared network drive or filing cabinet). If this is being done so electronically, screenshots can be taken to show how things are done as well as writing it out. Depending on how big the report or process is, these documents can be quite long (the people presenting the session had a report where the process documentation is 400 pages long, but is mostly made up of screenshots with the MS snipping tool).

When creating a process document, elements to include are points of contact for information needs, location of documents needed, the data cleanup that may have needed to be done prior to, any internal reports or documents relating to this, and updates on changes to the report before or accompanying the procedures in detail.

Starting the process documenting task goes hand in hand with cross training. In most offices, one person is responsible for x number of tasks, and if anything were to happen to that person, the others in the office would be lost - "a single point of failure". With good process documentation, though, other employees or new employees can pick it up. When assigning a primary person to a report or task, have another person assigned as the secondary to also work on the process documentation. Teaching the task to another tests a person's depth of knowledge, and helps develop the relationships in the office. It can also prepare an employee to share with others outside the office as well as bring new light to the process itself. While teaching and writing the process document, the secondary needs to read what the primary has documented and "score" it - score cards are useful and imperative in this situation. For example, having a score card of a 1 - understand it, 2 - am able to do it, and 3 - teach to others, can help the primary find out what they are writing well and what explanations might need improvement. After the documentation is written and the training occurred, the secondary is now able to take on the task as the new primary, allowing the former primary to focus on other reports or process documentation. The next time the same report is due and the former secondary begins working on it, that person will now be the primary and able to go over the process documentation with a new secondary to ensure that what was written before is still able to be understood, replicated, and taught to others in the office.

In my prior role of Learning Specialist at LU, I wrote the process document for student employee paperwork as I was the one who had been doing it for years for my department and was transferring to a different role. The document is extremely long, but was helpful to my replacement. That office had up to 50 student workers in 3-5 different job roles with different pay scales in a semester, with most being paid from a grant. There were lots of SERs, time sheets, and time and effort forms to be completed. Students who worked for that department could also work for other departments on campus, so collaboration was necessary to ensure students did not work over 20 hours per week total, time and effort forms were filled out correctly each month, and that there were no occurrences of students filling out time sheets that said they were in two places at once. I completed the time sheets for the student employees since we had a time clock, but there were many factors in place for doing so and correcting errors (someone forgot to clock in or clock out). I know this helped the new person a lot, and it was a grueling document to author, but it was worth it. I am lucky in my current role that there was some documentation for processes already, but not for all processes, and some haven't been updated as systems or reports changed. In my nearly five years at LU, I've seen many employees come and go (including retirement) and know departments have struggled because of it, so implementing process documentation and cross training campus wide would be proactive for LU departments and employees. If that's not possible, then I hope that any employee reading this will consider the value of process documentation and cross training for their office, even if it is an office of one or ten.