

Internship Full Report: Tuition Assistance Benefit (TAB) Program Resources

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INTE 6930 – Fall 2019**



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Proposal

The problem/need/opportunity

I began managing the University of Colorado's (CU) Tuition Assistance Benefit (TAB) program in Fall 2017 in the midst of the introduction of the three-year Fall 2017 to Summer 2020 TAB Pilot Program which allows dependents (spouses, children, domestic partners, etc.) to use the TAB, in addition to the pre-existing benefit to CU faculty/staff. Upon my role's start with TAB, I knew there was room for a lot of improvements with the very intricate, multi-step, multi-office and multi-campus TAB program. The primary problem was creating efficiencies to their new online TAB application, which had been a paper form until Fall 2017, as well as creating better communications to employees on the TAB's complex administrative policy statement (APS) and allowing them to understand how to utilize the TAB effectively.

Previously, the TAB website had limited information, as well as inaccuracies, which had often resulted in faculty/staff missing TAB deadlines and violating the strict, no exceptions TAB policy in error. There were no resources for employees to get visual assistance with submitting their TAB application, understanding TAB taxation or simply reaching correct deadline dates on the TAB website.

Please note: "Faculty/staff" and "employees" are used interchangeably throughout this document.

Goals and intended audiences

As I have made improvements to the TAB application itself, my main goal has been to improve resources on the TAB for our faculty/staff, which includes direct and varying types of communication. With the TAB program being so complex and spanning across the four CU campuses, I aimed to expand knowledge of the TAB program with accurate information and resources where faculty/staff can learn at their own pace on their time. The intended audience will be for all TAB resources to be public to CU's faculty/staff, as well as their eligible dependents (spouses/children, etc.) for these purposes. TAB resources are expected to be shared to expand program information amongst the CU community.

Planned activity

During my enrollment in the Learning Design & Technology (LDT) program, I have created three major TAB resources for faculty/staff and their dependents thus far:

1) TAB website revamp—

In Fall 2018, after attempting to receive administrative buy-in, I was able to create a [TAB website redesign](#) in conjunction with my department, Employee Services', Communication team. The TAB website redesign included: improved layout, accurate information and new/short code URL links to TAB information, such as employees

versus dependent information, TAB deadlines by campus of registration, TAB taxation guidelines and clear links to the previously hidden TAB administrative policy statement (APS). *Completed November 2018.*

- 2) “How to submit the TAB application” training videos—
Reviewing the TAB ticketing system, Cherwell, where emails and phone calls from faculty/staff are recorded internally, I noticed our highest number of questions were about how to submit the TAB application. I immediately set forth to create a resource that effectively walks first time faculty/staff through submitting the TAB application online through their employee portal. A Captivate video was created for each different TAB type: employees, Boulder dependent Option A-Home Campus, dependent Option A-Home Campus and Option B-Other Campus. With four separate TAB training videos, this assisted with reducing the number of emails and phone calls from employees and allowed Employee Services to redirect employees to these training video links, also. *Completed November 2018.*
- 3) TAB taxation webinar—
In order to remain in compliance with IRS regulations, CU must tax employees and their dependents appropriately based on several different guideline factors. In the past, employees have responded negatively about TAB taxation due to lack of knowledge on the IRS guidelines, as well as Employee Services processing guidelines. As this is a highly sensitive legal topic, I wanted to create a detailed resource that could walk faculty/staff through their tax responsibilities. After several rounds of script and visual approvals by CU’s legal team, I created a webinar on TAB taxation. The webinar recording was documented as a permanent video on the [TAB taxation website](#). *Completed April 2019.*

Methods for assessing success

There were several data outputs that determined success for these TAB resource implementations:

- 1) Reviewing Cherwell ticket numbers: Reduced email and phone call numbers on general TAB questions (TAB website), TAB taxation questions (webinar) and TAB application questions (training videos), signified that improved communications were successful in dispersing TAB information to faculty/staff.
- 2) Website analytics: Increased clicks on specific TAB resources on the website proved that faculty/staff utilize these added avenues of information for help in understanding the TAB program. Overall website visitors will be evaluated.
- 3) Number of TAB applications: Increased number of submitted TAB applications by faculty/staff demonstrates increased communications and website usage, as well as understanding of the TAB program from the website, webinar and training videos.

Anticipated outcomes and value of the work

The TAB website redesign, TAB application training videos and TAB taxation webinar were anticipated to be powerful “wins” for the TAB program. With improved communications/TAB resources, this reduces the amount of work for Employee Services internal employees with fewer emails and phone calls to process. Additional TAB resources have also created increased foot traffic on the TAB website and increased number of TAB applicants each semester. With increased TAB program visibility through these resources, as well as increased marketing efforts throughout the University, CU faculty/staff have been able to utilize the TAB, improving themselves personally and professionally. The data behind these activities were expected outcomes as I was already familiar with the TAB program in my TAB Program Coordinator role. Additionally, my familiarity with pulling data reports for TAB gave me an insider’s edge to make educated predictions at continuing TAB data trends.

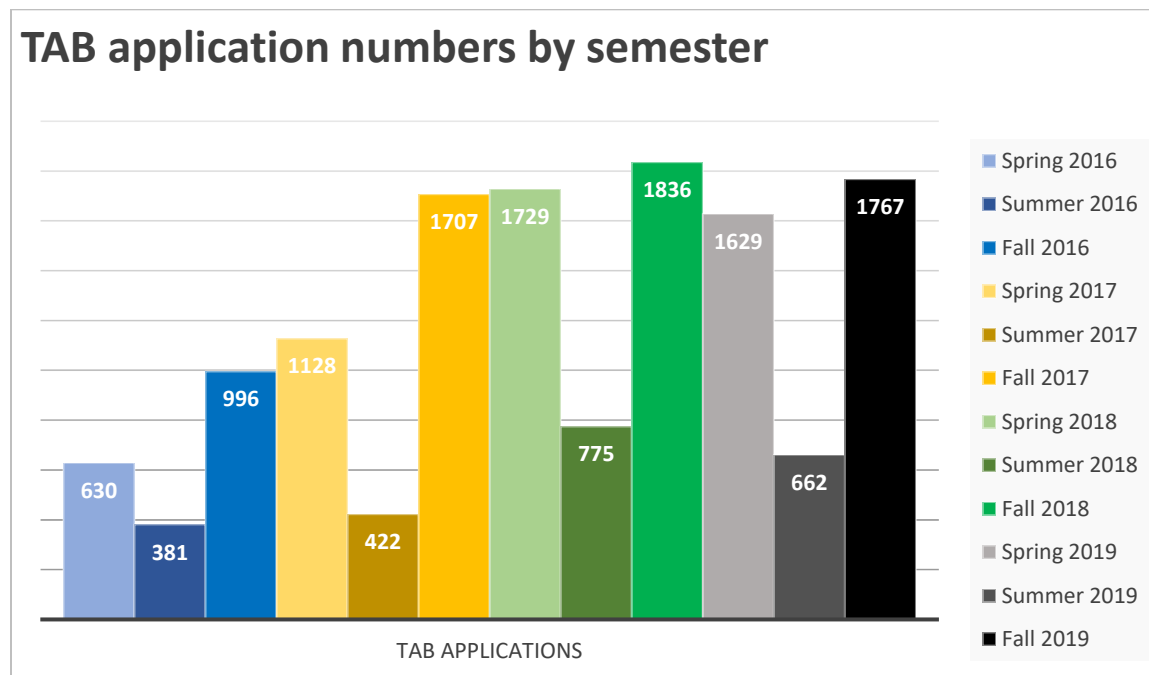
Outcome

Data

The continued usage of the TAB website redesign, implemented TAB taxation webinar and TAB application training videos exhibit the following data on a semesterly basis throughout the TAB Pilot Program - Fall 2017 through Fall 2019:

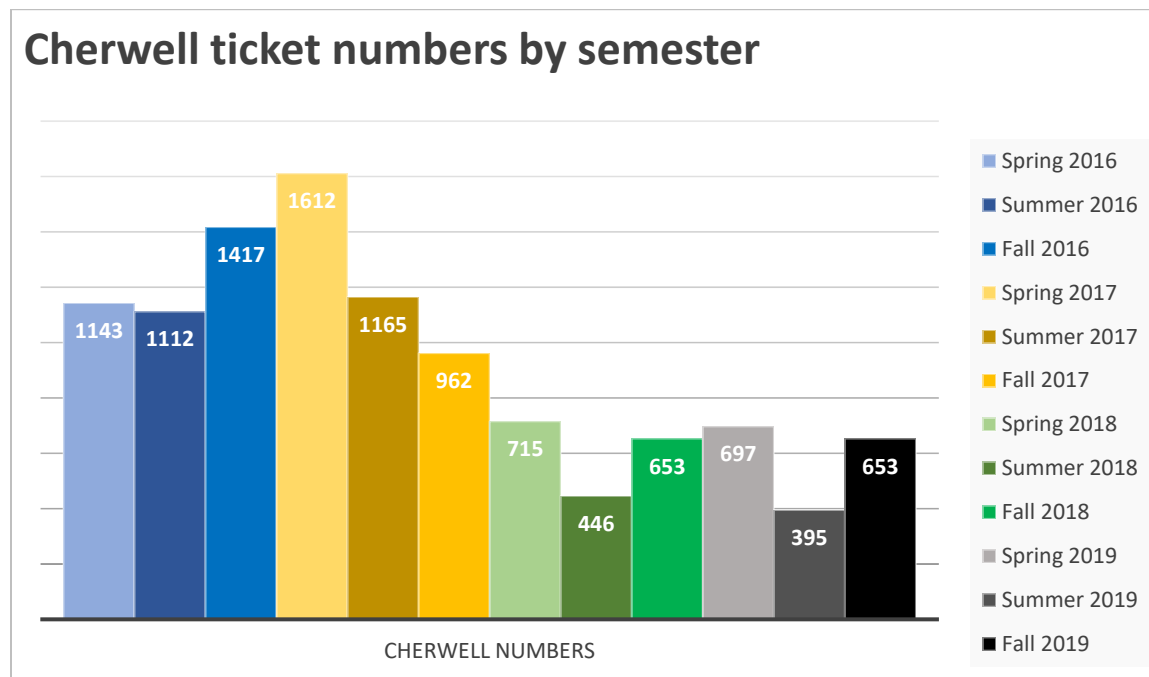
TAB application numbers

As exhibited in the graph below, the number of TAB applications continues to increase, except for the most recent Fall 2019 semester. The plateaued number of Fall 2019 TAB applications can be attributed to reduced number of multiple TAB applications from the same employees resubmitting multiple applications with corrected courses and requested number of credits to be waived. This verifies that the online TAB application process continues to become more streamlined each semester both for internal processing and from a customer service perspective for faculty/staff. Additionally, it's worth noting that although summer semesters demonstrate lower number of TAB applicants compared to the fall and spring semesters, summer applications continue to increase from year-to-year. As the majority of enrolled students attend courses in the fall and spring semesters, summer students traditionally consist of lower enrollments in comparison.



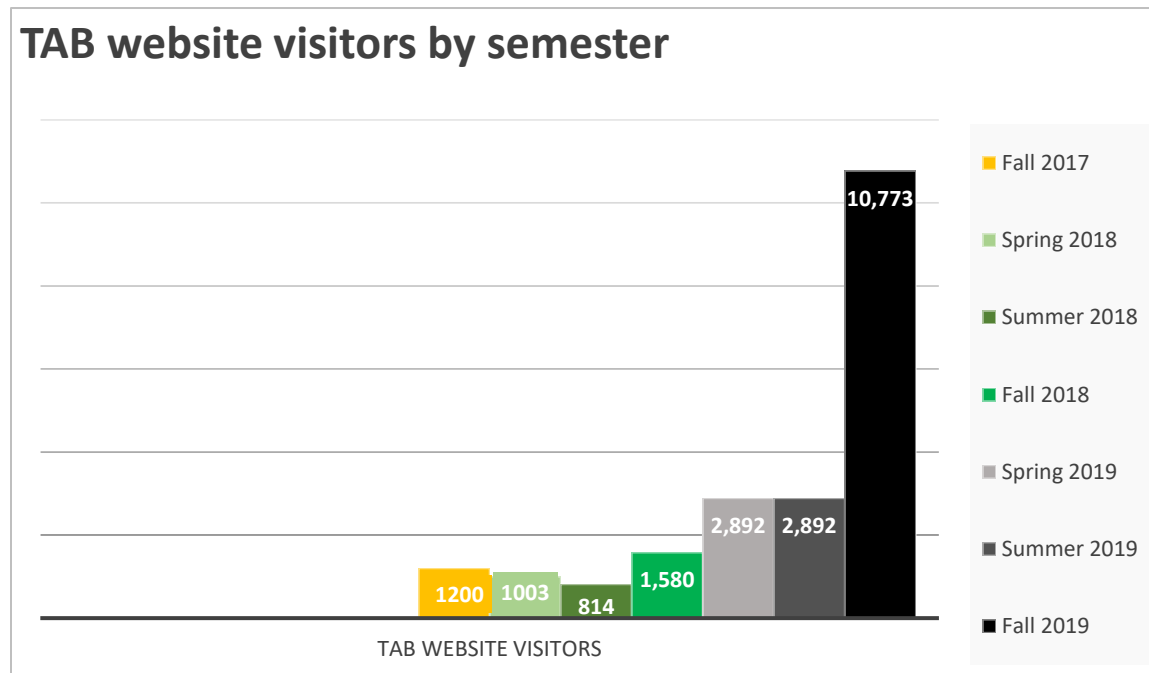
TAB Cherwell numbers

Before the TAB Pilot Program beginning in Fall 2017, the number of emails and phone calls reached 1,612 at its peak in Spring 2017. At the beginning of my role as the TAB Program Coordinator in Fall 2017, I created first-time email templates with standardized information for ease of resource access to faculty/staff, as well as for speed of internal email processing. Cherwell numbers (emails/phone calls) drastically reduced in size due to this and plateaued in the 2018 and 2019 spring and fall semesters. I attribute this plateau in emails and phone calls to robust email communications, which with the implementation of the TAB resources, linked to the TAB website, taxation webinar and TAB application training videos. Multiple email responses from the same employee (re-opened Cherwell tickets/emails), although not recorded by Cherwell, also reduced, lowering the amount of work for Employee Services' benefits call center and the TAB team's number of email responses needed for faculty/staff.



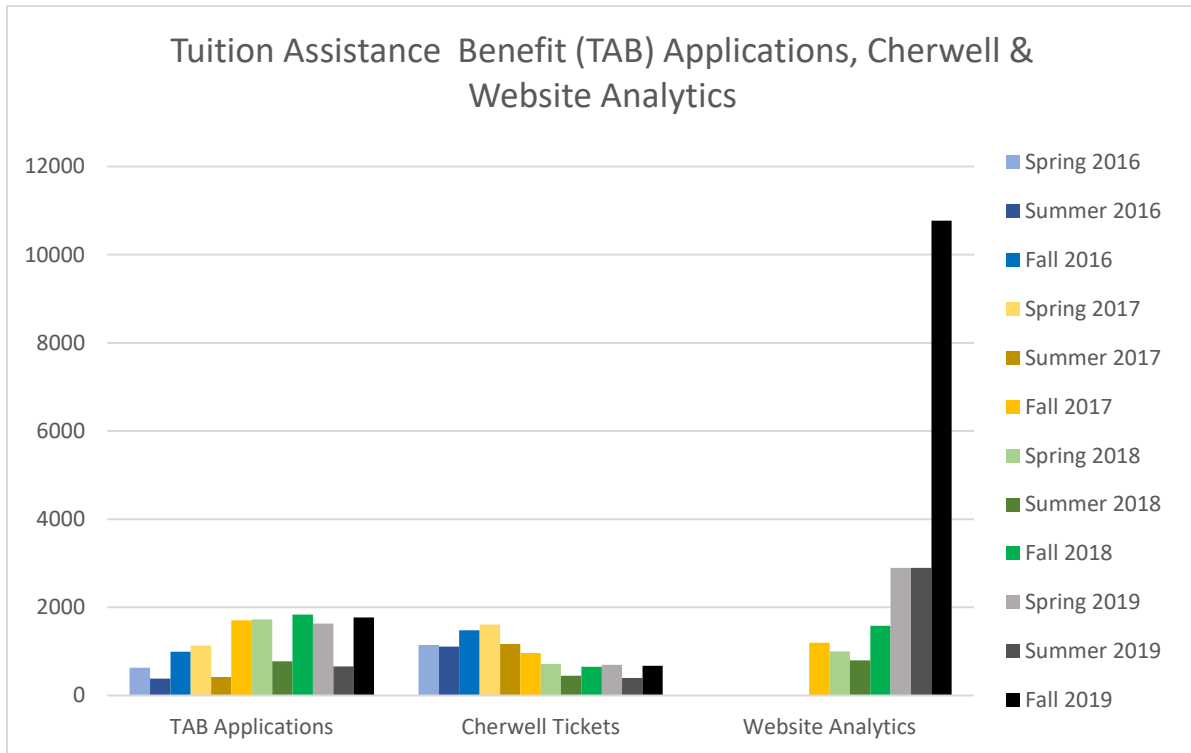
TAB website analytics

Although website analytics are absent for the time period prior to Fall 2017, the bar graph below shows a significant increase in website visitors each semester, with a drastic increase in Fall 2019. Growth in the number of visitors to the TAB website can be credited to the addition of new resources, email communications on these resources, as well as marketing efforts in the form of email newsletters. With the TAB website redesign, email communications with CU faculty/staff were refined to include URL links to the website’s specific pages, such as the employee versus dependent informational pages, taxation and taxation webinar video, and CU campus of registration deadline step-by-step pages. The redesign of the TAB website, to include accurate program information, allowed for vaster sharing of the web pages, as well as advertising of TAB resources, including the taxation webinar and TAB application training videos. As marketing efforts continue and the visibility of the TAB program expands with resources and faculty/staff word-of-mouth, number of TAB website visitors have exponentially increased.



Total TAB numbers: applications, Cherwell and website analytics

The following is a combined graph showcasing the increase in number of TAB applications and website visitors with a decrease in number of Cherwell tickets (emails/phone calls):



Learning, Design & Technology (LDT) Competencies

The following [six competencies of the LDT program](#) are outlined below, including a brief explanation of how the implemented TAB resources are inclusive of these values:

1. Reflective practice—

Adopt a critical stance toward your work, promoting effective practice and responsible use of technology:

- Existing technology was used within Employee Services to create the new TAB resources, including: OnBase, Captivate, Microsoft, and in-house audio. This limited cost, with a large amount of benefit and little risk.
- Effective and engaging resources were created with the idea of promoting digital citizenship and knowledge where all CU faculty/staff would have equal access.

2. Technology—

Become competent and confident in the use of various tools and technologies, related to learning, communication, and making things:

- The TAB resources implementation was a large learning curve for me personally as all three resources were my first experiences with website redesign, presenting a webinar and creating Captivate training videos. After creation, I am confident that I can continue utilizing new technologies to create efficiencies in any role.

3. Learning & instruction—

Drawing on learning and instructional theory, create instruction with well-aligned outcomes, activities, and assessments:

- The ADDIE model was used on each TAB resource:
 - Analyzing the project's need and conducting a gap analysis.
 - Designing documentation to outline and prepare for project implementation.
 - Developing scripts, materials for creating TAB application prototypes, and reviewing TAB program information for accuracy in advance.
 - Implementing resource materials with different technologies, department groups/individuals and scheduling was reviewed.
 - Final resource plans were evaluated for feasibility and final products reviewed for areas of improvement.

4. Creative and social media—

Demonstrate proficiency with tools, platforms, and environments in the creation of media resources for learning and knowledge construction:

- The TAB application and TAB website have been the focus for implementing CARP design guidelines in order to disseminate information about the TAB program as easily as possible to the largest faculty/staff audience possible. Accessibility has always been a focus in the creation of TAB resources, from closed captioning and ease of navigation on the TAB taxation webinar video to clear, concise verbiage on the TAB website. Although the complex policy

program guidelines were implemented onto the TAB application, CARP design guidelines, font and back-end workflow logic were considered in the application design. Faculty/staff is encouraged to access resources and learn the TAB process on their own at their own individual pace.

5. Inquiry and change—

Engage in systematic processes of inquiry and change:

- Analytical thinking was utilized to evaluate the shortcomings of the TAB program and where opportunity for improvement exists. Through this analysis, collaborative efforts were utilized to create TAB resources on several different technology pathways. This process empowered significant improvements to the TAB program, as well as encouraging future TAB improvements amongst multiple stakeholder groups.

6. Professional learning and leadership—

Demonstrate a commitment to lifelong learning and leadership within the profession:

- Program coordination played a major role in managing different stakeholders involved in the creation of the TAB resources, including the Employee Learning & Development team, Communications team, as well as the Benefits team. The addition of the TAB resources also helped to create a consistent and more visible online presence for Employee Services and the TAB program. These resources helped launch the TAB program as an advanced option for employee development and support from CU.

Supporting Research

Training Needs Assessment

At the core of creating the three TAB resources, was a reflection period on what areas of the TAB program could be improved to assist faculty/staff in understanding its policies and processes. Areas of weakness in the TAB program were reviewed, including reviewing email and phone call category data from Cherwell for commonly asked questions and areas of confusion. It was originally clear that the highest priority project was to update the TAB website for usability, as well as for accurate information. From this, the two main areas that faculty/staff struggled with were submitting the TAB application itself and understanding their tax obligations with the TAB. A training needs assessment was completed.

Reflecting on Linda Dausend's [training needs assessment in four steps](#), the following questions are examples of a linear evaluation process (Dausend 2017):

1. What does the organization want to achieve as a result of this program?
 - a. My goal with TAB was to create better communications on the TAB program process and policies. Thus, empowering faculty/staff to learn through several different resources.

2. What knowledge and skills do participants need to be successful?
 - a. At a base level, CU faculty/staff needed to be aware of the TAB program itself and be able to navigate to the [TAB website landing page](#) to explore more information.
3. What are individuals' key characteristics or constraints?
 - a. Constraints from the faculty/staff perspective would be lack of time to explore resources and inability to physically locate them. Internally, my constraints were time limitations in order to fully implement resource projects, as well as needing to create budgets within the already existing department's technologies in order to not increase our budget.
4. What are recommend methods for identifying and evaluating the needs that have been established?
 - a. As I've previously established, methods for measuring success were examining the number of TAB applications in our OnBase system, reviewing Google website analytics and pulling Cherwell data (emails/phone calls).

Similarly, the U.S. Office of Personnel Management breaks a [training needs assessment into three brief steps](#) (U.S. Office of Personnel Management, n.d.):

1. Determine Agency Benefits of Needs Assessment—
 - a. This can be broken down into identifying stakeholders to gain internal support, describing desired outcomes and setting expectations for behaviors needed to meet expectations.
2. Plan—
 - a. The planning period is important in order to set goals needed for the assessment, evaluating the previous needs assessment and preparing the project plan.
3. Conduct Needs Assessment—
 - a. The final step in this training needs assessment considers defining any performance issues, researching solutions and building a business case for the upcoming change to your program or department.

Comparing this three-step process to TAB, a needs analysis was done by considering feedback from CU faculty/staff on what TAB information they were struggling with most. Next, my goal was to evaluate data such as Cherwell numbers and possible solutions for creating resources. The business case for creating the TAB resources was simple with data to back up the needs assessment and the support of my manager to collaborate with other teams in a solution.

Performance Management

Meghan M. Biro's blog, ["The Best Performance Management Puts Humans First"](#) describes how properly functioning performance management plays a role in implementing new processes in a work environment. Whereas organizations that have one or two performance rating meetings a year may struggle to connect and retain employees, today's focus on ongoing performance management with regular check-ins and overall system reviews can allow employee's roles to soar. For example, Biro explains how a manager's focus is on productivity and thereby, a manager can begin to relieve task pressure when trusting employees to perform well by conducting regular professional check ins. (Biro 2019)

Enrique Capella and John R. Patton, explain [human performance management](#) even further by referencing R. Bacal, who defines performance management as "an ongoing communication process, undertaken in partnership, between an employee and his or her immediate supervisor that involves establishing clear expectations and understanding about: the essential job functions the employee is expected to do, how the employee's job contributes to the goals of the organization, what "doing the job well" means in concrete terms, how employee and supervisor will work together to sustain, improve, or build on existing employee performance, how job performance will be measured and identifying barriers to performance and removing them." (Cappella & Patton 2006)

To summarize, both Biro and Cappella & Patton are outlining that human performance management lies in continuous and consistent communication in the form of feedback and expectation setting between supervisors and their employees. Employees cannot grow as professionals without relationship building with their supervisor, as well as being given the trust and room to create new processes and efficiencies.

In the case of TAB, the implementation of the three new resources was successful due to continuous feedback and support from my supervisor. They assisted in gaining the approval of different stakeholders in Employee Services, including our Communications team and Employee Learning & Development team. From this, I was able to begin swift and effective work developing and planning each TAB resource, one by one. Without proper human performance management, the TAB resources would have never been produced and implemented. This was also proven as I had attempted to begin development on other TAB resources under previous different management, to no success. The relationship and trust built between supervisor and employee are pivotal to any project's success.

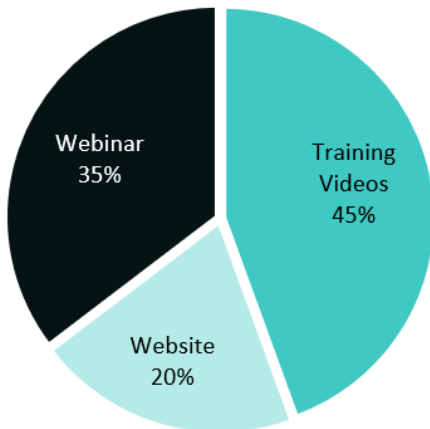
Hours Logged

The following table outlines the number of hours logged working on the TAB resources previously discussed in this document:

Project	Activity	Date	Hours Logged
TAB Application Training Video	Scope of Work Meeting with Employee Learning & Development (ELD) + Weekly Meetings	October 2, 2018 – November 30, 2018	15 hours
TAB Application Training Video	Application screenshots using Captivate	November 8, 2018	3 hours
TAB Application Training Video	Writing Captivate Video Scripts	November 12, 2018 - November 28, 2018	17 hours
TAB Application Training Video	TAB Application Video Final Edits/Approvals	November 28, 2018 – November 30, 2018	3 hours
TAB Application Training Video	TAB Application Video final mp4 creation and addition to the TAB website	November 30, 2018	2 hours
TAB Application Training Video	Training Video communications internally with team and edits for Marketing materials	November 30, 2018 – December 7, 2018	4 hours
		Project Total Hours	44 hours
TAB Website Redesign	Scope of Work /Benefits Team Website Meetings	October 8, 2018 – November 28, 2018	11 hours
TAB Website Redesign	Website Edits: Layout, Accuracy, Spelling/Grammar	November 14, 2018 – November 21, 2018	9 hours
		Project Total Hours	20 hours

TAB Taxation Webinar	Webinar Proposal & Outline/Meetings	January 10, 2019 – January 28, 2019	7 hours
TAB Taxation Webinar	PowerPoint Taxation Creation/Researching guideline accuracy	February 1, 2019 – February 11, 2019	9 hours
TAB Taxation Webinar	Reviewing PowerPoint with CU’s legal team	February 13, 2019 – April 5, 2019	6 hours
TAB Taxation Webinar	PowerPoint Edits for Payroll Captivate Edits	April 8, 2019	2 hours
TAB Taxation Webinar	Webinar Recording Practice	April 9, 2019 – April 16, 2019	6 hours
TAB Taxation Webinar	Webinar Live Recording	April 17, 2019	2 hours
TAB Taxation Webinar	Webinar communications internally to team and Marketing materials edits	April 18, 2019 – April 24, 2019	3 hours
		Project Total Hours	35 hours
		Total Project Hours for Three Projects	99 hours

The following graph divides my total hours logged from each TAB resource project into percentages:



Conclusion

Value to CU

The TAB resources created have an immense benefit to CU, making an extremely visible program more accessible with open knowledge sharing. By analyzing internal TAB program data on applications submitted, Cherwell numbers and website analytics, feedback from faculty/staff was also utilized, creating better communications and shareable resources online. The current TAB data outlines a successful resource implementation with the creation of the TAB website redesign, TAB taxation webinar and TAB application training videos:

- The number of TAB applications has increased 71% during my TAB Program Coordinator role.
 - I attribute this to greater communications to faculty/staff through the TAB website redesign and marketing of our TAB resources through email newsletters.
- TAB Cherwell (emails/phone calls) tickets have reduced by 35%.
 - I attribute this decrease to my first-time documentation of email communication templates, with the addition of links to our TAB website, TAB taxation webinar and TAB application training videos.
- TAB website visitors have increased by an outstanding 798% from Fall 2017 to Fall 2019.
 - With the overall TAB website redesign and TAB resources posted on the website, our Communications team was able to better market the TAB program to faculty/staff. The TAB program's visibility has increased exponentially and as the program is being marketed for recruiting purposes, as well as for employee retention, its importance continues to grow.
- TAB appeal numbers have decreased by 85%.
 - Again, greater TAB resources have created better communications on the TAB program policies, thereby, allowing employees to better follow the strict administrative policy statement.

The TAB resources created have empowered employees to advocate for themselves as learners in order to utilize one of CU's greatest benefits to faculty/staff who are also students.

Additionally, through the TAB resource creation, the program's reputation has improved from one of disorganization and complication to a worthwhile benefit that should be utilized. I recently represented a TAB booth at CU's Employee Services Expos on each of the four CU campuses and received positive feedback from faculty/staff that had graduated using the TAB for the entirety of their time as a student. This is a stark difference from the beginning of the TAB program when I began in my role in Fall 2017, where most of my emails and phone calls were upset faculty/staff who would often point out inaccuracies on the website and felt blindsided by our taxation processing. The benefit of these resource efficiencies to the TAB program are significant and will continue to benefit Employee Services for years to come.

Personal Reflection

It has been a remarkable learning experience to be able to come into a role in the TAB program where room for efficiencies to be created exists. While some professionals might be daunted by a similar situation, I viewed it as a challenge and an opportunity to expand my skills. In conjunction with my LDT program knowledge and applying my professional knowledge, the creation of the TAB resources was a long time in the making. As I have been in the TAB Program Coordinator role for two and half years now, it took almost the entirety of that time to implement these resource solutions.

I was fortunate to be able to collaborate with my department's Employee Learning and Development team and Communications team on these projects, as well. Together, we created the TAB website redesign, taxation webinar and TAB application training videos. It was a pleasure to be able to expand my knowledge on using Captivate for the first time in creating scripts and recording videos for the TAB training videos. I also was able to work further with our legal team in order to verify my webinar slides and scripts. Once these were approved, I was able to present my first webinar on TAB taxation, which is utilized daily as we communicate with employees on IRS guidelines. The taxation webinar is an innovative and shareable solution that can be used long term. Additionally, in offering step-by-step training videos on how to submit the TAB application, these not only reduced Employee Services workflow, but it creates a better customer experience. Rather than submitting multiple applications, employees can watch a training video on their own time at their pace and learn to utilize TAB resources. Furthermore, being able to have the support of my supervisor in implementing these resources exemplified what a productive performance management collaboration has to offer.

It has been a pleasure being able to combine my LDT program knowledge with my professional role as the TAB Program Coordinator. I am gratified that the two have reciprocal benefits for my education, as well as to the TAB program. I will continue using my lessons learned from the LDT program to benefit the TAB program and any future roles that I may work in.

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