

The Consortium Alternative: Getting the Best Training for Less

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ABSTRACT

In June, 1990, The Hartford Area SAS® Users Group (HASUG) realized there was little SAS training offered at any of their member companies. As a result, HASUG began an aggressive program to sponsor SAS Institute consortium courses. As of April 1992, these courses saved member companies approximately \$250,000 while training about 360 students.

Along the way, HASUG learned about the requirements of supporting consortium classes. This included the need to publicize courses and to develop a sense of shared ownership. We also learned that successful consortium courses require attention to a myriad of details. Last, we found that consortium education can be an important function for local SAS user groups.

This paper gives an overview of all SAS training alternatives and provide a flowchart to help guide you to the appropriate training solution. This paper describes techniques that may be used to run courses more smoothly.

INTRODUCTION

Do these problems sound familiar?

- SAS users (or would be SAS users) in your organization need training in SAS.
- The nearest SAS training center is out of commuting range.
- There are too few users in your organization to have SAS Institute come to teach an in-house course.

What can be done to resolve these problems?

Members of HASUG determined that few of their companies offered SAS courses. Thus, we shared a common problem. We looked into consortium training by SAS Institute and found it to be a near perfect solution. Consortium training courses are now a major function of HASUG, with five companies now sharing the role as the host site.

Consortium training is a triple-win situation: Individual users receive excellent training at low cost. Local SAS

users groups benefit by increased communication and sharing of ideas among members. SAS Institute fosters happier SAS users and promotes software sales.

What is consortium training? A host company provides a classroom, often in exchange for free tuition for some of its students. When the course features workshop exercises, the host company provides access to a computer. The host company or a local users group announces that the course is available and registers students from local companies. The organization that conducts the course then bills the participating companies the prorated cost of providing the instructor and training materials.

TRAINING ALTERNATIVES

A common question asked by members is, "Why bother to arrange consortium courses? My organization could simply purchase computer-based training programs or videotape courses and have the users teach themselves."

While self-study methods have their place, we believe that most people learn better from instructor-led, hands-on methods. Students usually prefer to have their questions receive immediate, expert answers. Reinforcing lessons immediately through coding practice programs is very valuable.

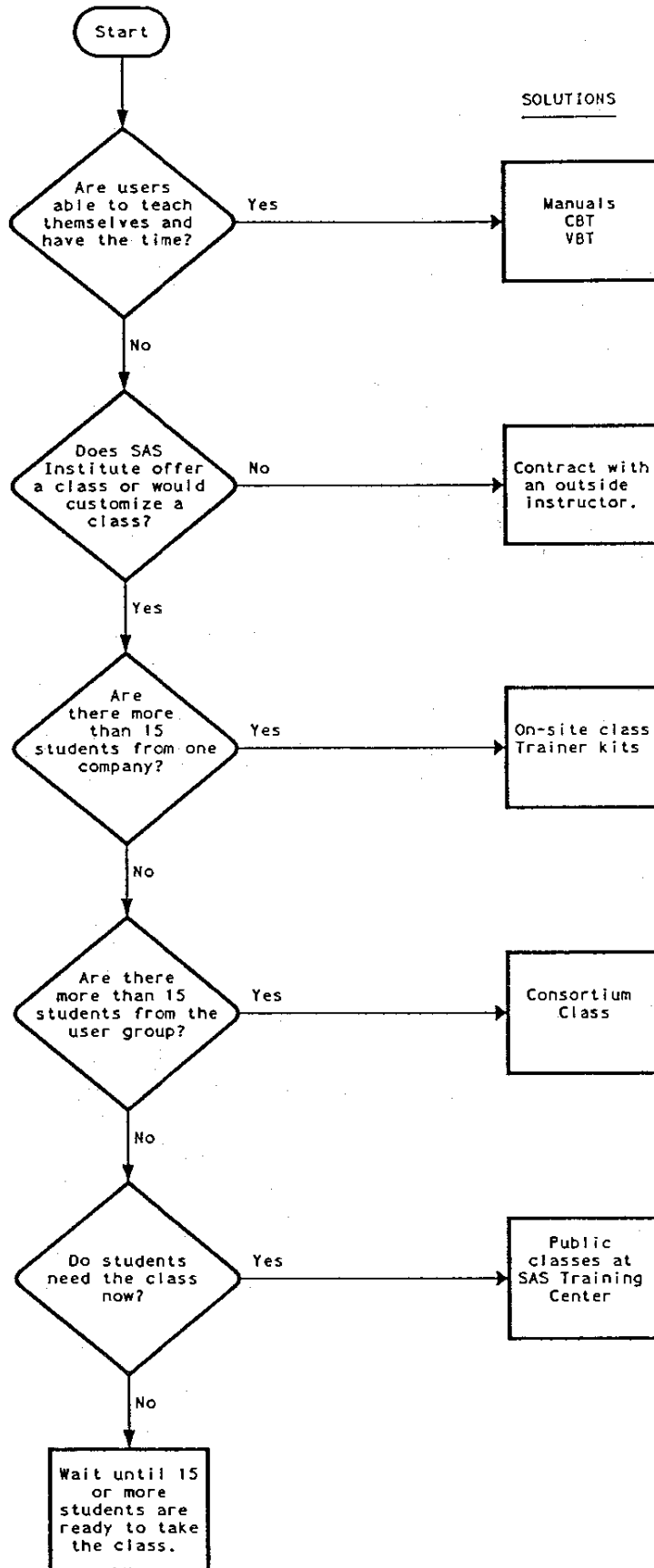
To help sort out training alternatives we developed the SAS Training Alternatives Decision Flowchart. The flowchart is displayed on the following page. Use this flowchart to assist you in selecting the appropriate training alternative.

SELF-TRAINING ALTERNATIVES

Self-training methods may prove satisfactory when the students are self-motivated, are not computer-phobic, and have enough training time. These methods include learning from manuals, watching video-based training courses and using computer-based training courses.

These solutions have the advantage of requiring the smallest outlay of cash and can always begin immediately. However, when one accounts for the value

SAS TRAINING ALTERNATIVES - DECISION FLOWCHART



of the student's time, these solutions may be less attractive.

Self-training alternatives can be made more effective by customizing the generic materials with supplemental site-specific information. When self-training alternatives are used in group settings, some of their weaknesses, such as lack of motivation, may be overcome. The Usery paper listed in the References section discusses this concept.

NON-SAS INSTITUTE INSTRUCTORS

When SAS Institute does not offer a desired course, arranging for another instructor is an alternative. For example, many of our members wanted to learn about IBM OS mainframe job control language (JCL). However, a JCL course was not available from SAS Institute. HASUG arranged with a local instructor for a consortium JCL course.

You should be alert to two potential pitfalls when using non-SAS Institute instructors. First, some instructors have not worked with the latest releases of the SAS System or may have poor teaching skills. Consortium training spreads the cost of the instructor among many students. Hence, the costs saved by using a less qualified instructor are small.

Second, if you conduct a lecture/workshop course with a non-SAS Institute instructor, you risk violating the terms of your organization's SAS license. Most SAS licenses permit only members of your organization and consultants working at your site to use the SAS System on a particular computer system. All other persons, including guest students, are not authorized to use the SAS System on the host company's computer.

The authors have discussed this subject with SAS Institute. SAS Institute stated that it would consider permitting consortium hands-on computer workshop training on a case-by-case basis if the training meets the Institute's consortium training guidelines. You should contact your SAS Education Marketing and Sales Department Account Representative if your user group comes across this situation.

ON-SITE COURSES

On-Site courses are similar to consortium courses except that the students come from one organization. SAS Institute sends one bill to the organization, which may distribute the cost internally.

When there are more than 15 students, the cost of on-site instruction by SAS Institute is often less expensive

than consortium training. Consultants who are working at your site who are permitted to use the SAS software, would also be permitted to conduct workshop exercises for your organization's personnel only, within the SAS System license agreement

When many students need a course at one or several sites, on-site training by in-house experts using SAS Trainers Kits may be an attractive alternative. The Murto paper listed in the References section is an excellent primer on using the SAS Trainers Kits.

Another advantage of conducting a course on-site is the chance to meet unusual requirements at your site. For example, workshop exercises may be run in batch-mode if your site encourages batch processing.

CONSORTIUM COURSES

In 1990, every company represented on the HASUG steering committee had users who needed training. However, few companies had enough persons to conduct on-site courses. At SUGI 15, some of our members heard a paper by Tom Krasner describing consortium education. HASUG decided to sponsor consortium courses for the benefit of our user group members.

JOINT OWNERSHIP

One of the keys to our success is that no company or individual "owns" the consortium course program. Our goal is to schedule courses at as many member sites as possible. However, only a few companies are capable of hosting a consortium course. Some companies are defense contractors with visitor restrictions. Other companies do not have adequate classroom facilities.

However, we decided from the outset that we would rotate the sites so everyone would feel ownership. Every willing company would have a chance to get the two tuition-free student slots available when hosting a SAS Institute consortium course.

Another aspect of joint ownership is that all members work to fill courses, even those held at other companies. Members realize someday their company may host a course and need help filling it. Passive activities, such as announcing courses in newsletters, are only a start. To insure enough persons to hold a course, user group members at other companies are contacted and encouraged to refer prospective students.

WHAT COURSES TO OFFER?

Our experience has been that introductory SAS courses are popular. These courses are offered as often as demand warrants during the year at different sites.

Other courses, such as SAS Programming, SAS Report Writing, and SAS Macro Language appeal to fewer persons. These courses are offered once a year.

Periodically, SAS Institute offers new courses. This often occurs after the introduction of a new product or release. Recent examples include, "Enhancements to the SAS System" and "Advanced SAS Programming." New courses have proved popular with our user group because no one has attended the course before. Heightened interest occurs in a SAS product whenever a new product or release becomes available.

In our area, there are many large firms. Employees of large firms often can attend only budgeted courses. As the year progresses, departments exhaust their training budgets. To assist members in budgeting for training, our Spring newsletter announced the courses planned for next year. The projected cost of these courses was included in the announcement.

When scheduling courses, be optimistic. Several times, we have filled courses thought to have limited appeal. Courses may be cancelled up to three weeks before the scheduled date. The reason is that three weeks before the course, SAS Institute ships the course texts.

We have found that some people wait until the last minute to register for a consortium course. On several occasions, we were near the three week deadline and were one or two students below the 15 student cut-off. By making a few telephone calls, enough students enrolled to conduct the course.

SELLING THE COURSES

Each consortium course must enroll 15 or more students so SAS Institute will break-even and send the instructor. We have mentioned two of our sales techniques, networking among other SAS sites and publication of our course schedule in our newsletter.

A third technique is to contact your account representative in SAS Institute's Education Marketing and Sales Department. They will refer prospective students from your area who call SAS Institute. Call your representative early for help filling a course. He or she may arrange to send out a special mailing about your course to local SAS sites.

An important part of both scheduling and selling consortium courses is to allow plenty of lead time. A rule of thumb is to schedule a course at least three months ahead. For less popular courses, allow four to six months. If you know that you plan to offer a course but

have yet to set the date, tell your members anyway. They can start to get the approvals they need to attend the course.

There are several reasons the three month rule works. First, if your users group meets quarterly you will have at least one meeting available to publicize the course before the scheduled date of the course. Second, if your users group publishes a newsletter quarterly, you will have time to announce the course.

Third, the instructor-based training department at SAS Institute requires some lead-time to schedule an instructor. This is especially important when your group wants to sponsor a popular course that only a few instructors can teach. Last, if enrollment proves slow, a long lead time allows a chance to do some more selling.

HOW TO SCHEDULE A CONSORTIUM COURSE

First, select a host site. Choose the site with the most potential students and an available classroom. This is because some students will only attend courses offered at their site.

Students often worry when the computer system available for the course is unfamiliar. We advise prospective students that the SAS system runs similarly regardless of computer system. Thus, they can participate in the workshop exercises and apply what they learned after the course.

The course coordinator from the host site calls up their SAS education account representative to ask for an instructor and date. SAS Institute will schedule the course at a mutually convenient time. One trick we learned is to take the blank SAS registration forms and customize them for the course offered. We add the course name, location, date, time, cost, and registration deadline. We also include the name, address, telephone, and facsimile (FAX) number of the course coordinator.

Another technique is to copy the course description on the reverse side of the registration form. SAS Institute will invoice the billing contact shown on the form after completion of the course.

The course coordinator, with the help of the local user group, then distributes the registration forms to prospective students. You must give the number of students to SAS Institute three weeks before the start of the course. The registration forms are due to SAS Institute two weeks before the start of the course. Based on the student count supplied by the course coordinator, SAS Institute sends the course materials to the host site.

SAS Institute also sends a copy of the data sets used in workshop exercises.

Often, one or two persons wish to register after the deadline. Late registration is permitted when there are openings. If the course notes have already been ordered, the course coordinator calls the SAS Institute On-Site Administrative Coordinator and requests that additional copies of the course notes be sent.

The course coordinator arranges for loading of the workshop exercise data sets onto the host site computer. He or she should test that the student computer accounts can access the data sets. Some of the students will be from other companies. It is a good idea to arrange for some temporary computer accounts and passwords for outside students to use.

The course coordinator sends a course confirmation to the registrants. Helpful information includes the course starting time, travel directions, parking information and information about dining facilities. Include a telephone number for emergency messages.

If your company requires visitors to sign-in, the host company receptionist should be given an advance list of students. Your instructor will need a similar list to record social security numbers for continuing education credits.

RUNNING A SUCCESSFUL COURSE

The instructor will contact you about one week before the course. It is a good idea to exchange telephone numbers with the instructor in case any last minute questions or problems arise. The instructor should be provided with the following information:

- directions to the host company and classroom
- driving time from the airport to the host company
- local accommodations
- local areas of interest, sights to see, etc.
- areas of town to avoid

Plan to meet the instructor early on the first day. Every site has different procedures for signing on to the host computer system and starting SAS. Allow time to cover these subjects with the instructor. Discuss the scheduling of breaks and lunch.

To start the course, introduce yourself as the course coordinator and introduce the instructor. This is a natural moment to describe your user group and future consortium course offerings. To facilitate the mailing of course diplomas, hand out large (8.5" x 11") envelopes and ask the students to address them.

The instructor will ask the students to complete a course evaluation. Offer to collect them for the instructor. Review them for comments to improve your consortium courses.

RECORD YOUR SUCCESS

Some day, someone may ask you how much money your user group saved by sponsoring consortium courses. It is easy to do. Keep records of the courses your user group sponsors and lists of attendees.

The savings are the difference between public course fees and the consortium course fees. Include estimated travel, lodging, and meal expenses. Use the list of graduates to recruit students for future courses.

ACKNOWLEDGEMENTS

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SAS is a registered trademark of SAS Institute Inc., Cary, North Carolina. ® indicates USA registration.

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