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Being a Librarian Series



PROFESSIONAL DEVELOPMENT



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INTRODUCTION

From E-Learning to developing and implementing Personal Learning Plans, this FreeBook provides an overview of expert methods and advice for professionals looking to develop their careers in Librarianship. This resource contains case studies from institutions in the United Kingdom and America, as well as practical guidance on how professional development strategies can be implemented in any library.

This FreeBook features contributions from experts in their field, including:

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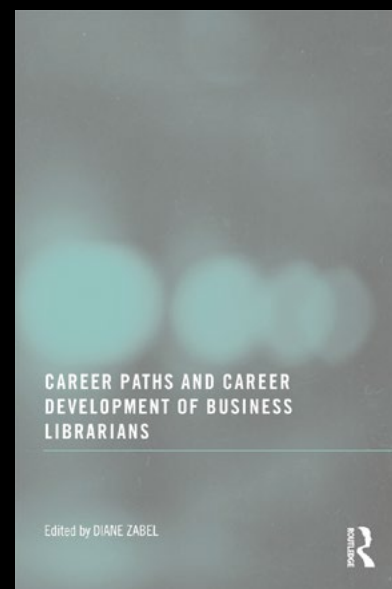
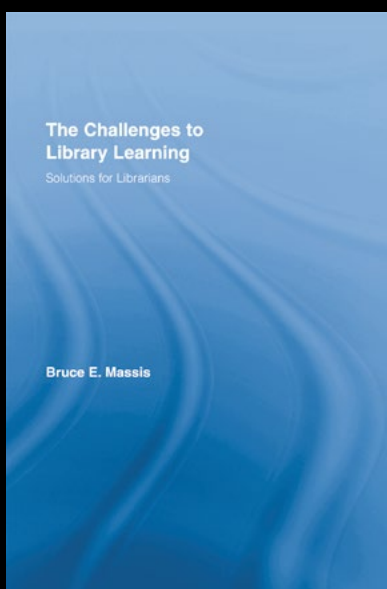
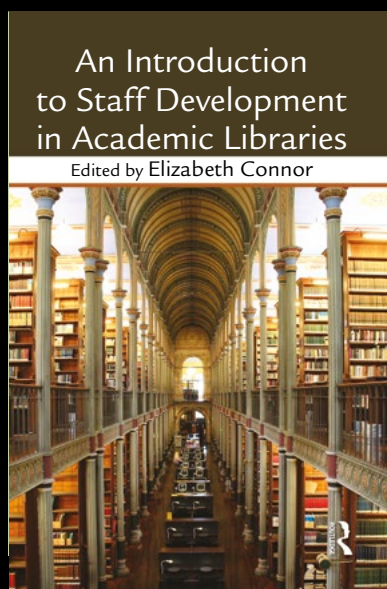
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Note to readers: As you read through this FreeBook, you will notice that some excerpts reference other chapters in the book – please note that these are references to the original text and not the FreeBook. Footnotes and other references are not included. For a fully referenced version of each text, please see the published title.



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CHAPTER

1

DEVELOPMENT OF MIDCAREER LIBRARIANS



This chapter is excerpted from
*Career Paths and Career Development of
Business Librarians*

Edited by Diane Zabel

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DEVELOPMENT OF MIDCAREER LIBRARIANS

Cory Tucker

Excerpted from *Career Paths and Career Development of Business Librarians*

INTRODUCTION

While thinking about being a midcareer librarian and analyzing one's career path, I came across a passage in Lewis Carroll's *Alice in Wonderland* where the Cheshire cat tells young Alice, "If you don't know where you are going, any road will take you there." Confusing? Maybe, but the quote illustrates an important point when it comes to choosing a career path. Planning is a crucial aspect of career development for librarians.

The midcareer librarian, in my mind, can be a person working in libraries between eight and 15 years and has worked for their current employer for over five years. At this stage in their work life, the person may be faced with the possibility of career impatience, stagnation with their current job, need of professional growth, or need for achievement (Sterns & Subich, 2002). Midcareer is a perfect time for self-assessment and renewal. Whatever the case may be, the midcareer librarian is faced with many difficult decisions from changing jobs or careers, engaging in development activities, moving to administration, and pursuing promotions. These can be further complicated by other issues including current work environment, job market conditions, and balancing work and family, particularly when children may be involved (Sterns & Subich, 2002).

This article takes a look at the midcareer librarian and discusses what challenges the person may face in his or her career path. In addition, it will analyze how the person can deal with these challenges through career development.

LITERATURE REVIEW

There are a few articles that touch on the topic of midcareer librarians. Reid (2005) acknowledged the difficulties faced by midcareer librarians and offered suggestions to help people reenergize themselves and survive in a constantly changing work environment. Among the suggestions given by Reid are self-assessment, matching your personality to your job and organization, and changing careers. Another article co-authored by Broady-Preston and Bell (2001) discusses the establishment of a distance learning program to help midcareer librarians acquire the skills and academic credentials to complete in a changing marketplace. Their article is a case study on the effectiveness of the program and also measured the attitudes of professionals in library and information science. A third article that is useful for midcareer librarians was written by Harhai (2002) and reviews 13 popular career self-help books.

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Although not specifically related to midcareer librarians, there is another article dealing with career development in librarianship. The article discusses results from the Library and Information Commission report on cross-sectoral mobility in the library and information services (LIS) profession (Dalton, Mynott, & Schoolbred, 2000). This study (conducted by researchers at the University of Central England in Birmingham) was created to look at the barrier to career development within the LIS profession, specifically targeting professionals moving to different sectors of the profession. The issues discussed by the authors include the following: professional segregation, employment strategies, self-confidence, training, and professional support. In an article published in 2004, Jacobsen provided a case study of graduates from the UCLA Graduate School of Library and Information Science. The article discusses the results of a survey of the class of 1988 and how their careers have progressed. Jacobsen offered insights on career development, moving jobs, dealing with office politics and changing technology, salaries, mentoring, and service in associations. Outside of librarianship, there are articles about midcareer professionals and development that may be useful for librarians at this stage in their career. Power and Rothausen (2003) proposed a model of midcareer development for individuals who are proactively managing their own careers. The model directs workers to define their work, identify its future requirements, and select a developmental direction. Three levels of midcareer development are also proposed: job oriented, work maintenance, and work growth. This new structure allows midcareer individuals to maintain or grow their employment security, income, and career satisfaction in an environment of increasing mobility and salary compression. The model is a useful tool for midcareer professionals as it touches on the economic and labor market concerns that influence one's career path and decisions.

Another article that is not related to midcareer librarianship specifically but might be nonetheless of interest is Montgomery's (2002) discussion about plateauing and long-term career satisfaction. Montgomery discussed the idea of career plateaus and provided a definition for the following three types of plateauing: structural plateauing, which occurs when an employee has reached the highest level one can obtain within an organization; content plateauing, when an employee has mastered the work and there is nothing left to learn; and life plateauing, which is characterized by little fulfillment in any area of life. This article provides possible ways to deal with plateaus.

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SELF-ASSESSMENT

The midcareer is a point where a person may re-examine and re-evaluate personal values and attitude, career goals, and progress (Carney, Wells, & Streufert, 1981). To help make an informed decision at this critical time in one's career, it is important to conduct a self-assessment on a personal and professional level. Self-assessment allows individuals to chart their progress, learning, and development to see how they are progressing on a personal and professional level. Conducting such evaluations will help individuals identify appropriate development opportunities, including staying in their current positions, making a lateral move, or accepting positions with more responsibility. Self-assessment allows an individual to analyse the stages in his or her career and see how these stages have affected his or her development and goals (London & Stumpf, 1982). A couple of interesting exercises can be found on the allbusiness.com website (www.allbusiness.com/human-resources/careers-careerpath/12068.html). One exercise involves writing down what you have enjoyed about your career in one column and, in another column, writing down what you could have done without. The exercise can help midcareer professionals identify what has been satisfying and what has not been satisfying thus far. Another recommended exercise consists of writing down your short-term and long-term goals to identify career priorities. This exercise can help you compare earlier to current goals, enabling you to see how these priorities may have changed. A final exercise is to create your ideal job description. This exercise can help with finding what job duties you prefer and what skill sets you will need to enhance.

PERSONAL GROWTH

Obviously it is important to analyze your personal growth and development. As you go through your life cycle and career path, you may develop new interests or desire new personal and professional challenges. As you change as an individual, you should evaluate how your job fits with your personal interests. It may be helpful for you to identify specific interests or skills that you cannot pursue in your current position. Once these interests have been identified, you can begin searching for internal and external opportunities to achieve these goals. Such an evaluation may result in an internal move within your current organization, a move to another organization, or a career change.

PROFESSIONAL GROWTH

Professional growth can be analyzed by looking at your past, present, and future career path. According to Carney et al. (1981), there are several stages in career



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decisions, and the midcareer librarian tends to be in the re-evaluation stage. The person in this stage may begin to examine more closely whether the job is fulfilling his or her expectations. The person may want to re-evaluate goals and alternatives. During this re-evaluation stage, it is a good idea to analyze your entire career path, from past to present to future.

Past Career

When analyzing one's career, a good place to start is with your past career as a librarian. Upon entering librarianship, you had an idea of what job you wanted and established specific goals for the first five years of your career. A simple question to ask is: did you meet all of the goals you established? If not, are these goals still applicable for your career? What events did you experience that may have altered your career path? How did these events and decisions affect your career path?

Current Career

Once you have delved into your past career as a librarian, it is important to look at yourself in your current position. What are you doing now? Are you happy with your job and workplace environment? What skills have you obtained in your current position? How will these skills help you in another job? How have your goals and aspirations changed? Are you still motivated to perform your job? Do the organization's goals and beliefs match your own?

Future Career

How have your values changed? Do you want more responsibility? Do you want to be a leader?

ORGANIZATIONAL ISSUES

When analyzing your career path, it is important to chart the course of your career within your current organization (Carney et al., 1981). Schein's (1971) model charts growth within an organization inwardly, vertically, and horizontally. According to Schein's model, inward growth does not involve a visible change in position, nor development of new skills; instead, this growth is measured in terms of interpersonal relationships. The next form of growth in this model is vertical, representing movement up the career ladder. Finally, the last measurement of growth is horizontal, which encompasses a rotation across a series of functions



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within an organization. This usually involves exposing employees to different facets of an organization. This model is helpful for an individual because it provides a picture of how one has experienced growth and professional development within an organization and may provide valuable insight into whether a person is ready for change or satisfied in his or her current environment.

One of the items related to the organization, and a major individual career path issue, is your development as a professional librarian. When looking at your current position, identify skills or interests that you have not achieved or fulfilled. Organizations should provide development opportunities. Thus, it is appropriate to ask yourself: are my needs being met? In this self- and career assessment, it is vital to have a clear picture of where you are personally and professionally, what you want to do with your personal and professional career, and how you can achieve these personal and professional aspirations.

CAREER DEVELOPMENT

Once you have conducted your personal and professional evaluations, you can identify specific goals and explore ways to achieve these goals. Whatever the career path you have chosen, there may be additional skills or opportunities you need to consider to meet your goals. These may include professional development opportunities, leadership and management training, and mentoring.

PROFESSIONAL DEVELOPMENT

Depending on the career path you choose, you may need to take continuing education classes through universities or professional organizations. Continuing education may also be an option through self-training. If you happen to choose the path to administration and management, you may be required to obtain another master's degree, MBA, or a PhD. In instances where a person is moving laterally in his or her existing organization, there are several library organizations (or divisions or sections within organizations) that can help build the necessary skills. For example, if a subject librarian would like to move into collection development or management, he or she can join the Association for Library Collections & Technical Services (ALCTS), a division of the American Library Association. ALCTS offers online classes, Webinars, and conference presentations and discussions. A possible option for professional development at the midcareer stage is sabbatical or other types of leave (Hubbard, 2002).



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LEADERSHIP

No matter what path you take, as a midcareer librarian, you will most likely be looked upon for direction and leadership within your organization or at your new organization. Some people are natural born leaders, and others are not. However, there are opportunities to learn how to be a leader. One option is to learn from existing leaders in your organization. Sit down with these people and discuss various aspects of leadership and obtain their advice. Another option is to research articles and books available on this topic. There are also numerous leadership institutes, such as the ACRL/Harvard Leadership Institute. A good listing of leadership training programs and institutes is available in a 2004 article by Mason and Wetherbee. Most regional and state associations have annual leadership institutes that can be extremely beneficial. Another way to develop leadership skills is taking on specific roles and projects in the workplace. One study indicates that a major influence on leadership development is an individual's ability to cope with job variety, responsibility, new tasks, and unfamiliar situations (Mason & Wetherbee, 2004).

ADMINISTRATION/MANAGEMENT

For a midcareer librarian, taking on management or administrative responsibilities is quite common. A person at this stage in his or her career may become a department head, division head, or other type of manager. This step in the career path can be a big change, especially for those people who have not previously supervised others. Supervision and management responsibilities bring new challenges and require the incorporation of a new skill set. Just as some people are not natural leaders, some people are not natural managers. Like leadership, management skills can be learned in various ways, such as through workshops, continuing education, or through professional organizations. Another option is to speak with people in management positions and attempt to learn as much from them as possible. There are many books published on the topic of becoming a manager that may be helpful as well.

MENTORING

As a midcareer librarian, you probably have had a mentor guiding you professionally along your career path. At this point in your career, you might be ready to become a mentor. Being a mentor can be rewarding in that you can pass along your knowledge, support, and experiences to another librarian who is just beginning his or her career. Mentoring may take place within an institution or within a professional association or organization.

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CONCLUSION

Reaching the midcareer point in the profession of librarianship can be a tumultuous time due to personal and professional changes. Although this can be a difficult phase in one's career path, there are several options available to deal with the various issues of a midcareer professional. It is important to carefully weigh your options and assess your career and personal life to choose the appropriate path to take for your future.

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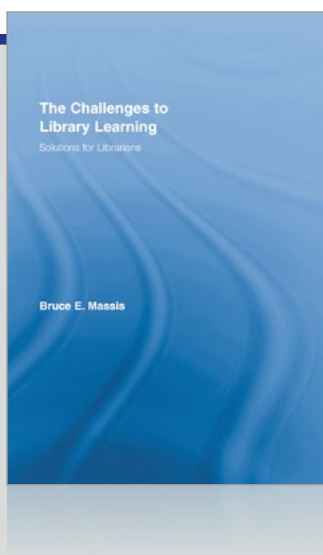
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E-LEARNING FOR LIBRARY STAFF



This chapter is excerpted from
The Challenges to Library Learning
By Bruce E. Massis

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E-LEARNING FOR LIBRARY STAFF

Bruce E. Massis

Excerpted from *The Challenges to Library Learning*

THE CHALLENGE—ACCEPTING E-LEARNING AS A ROUTINE LEARNING MODEL

When the mission statement of The Boston Center for Adult Education was developed in 1933, the aim was to create an environment where “small groups of men and women would meet together in living room settings to learn, discuss, and create for the sheer pleasure of doing so.” Surprising as it may appear to those who have not indulged in the e-learning arena is that a similar environment can also be created despite the physical presence of either the instructor or the class.

When adult students enter the online learning environment, many are not exactly certain what to expect. In a comprehensive “blended learning” program where e-learning is incorporated into a fully functional package of live instruction, teleconferences, Web delivery of content, and the like, the opportunity to learn in this “anywhere, anytime” environment can become an attractive and valued learning tool. However, it can also present certain challenges unique to the online learning environment.

It is quite clear that all libraries are increasing their dependency upon technology as a means by which the communication of information and the importance of information literacy is transferred to its users. Some library staff continue to experience an increased level of anxiety because of the constant changes and added pressures that come along with such dependency. This is often attributable to perception that the public has yet to fully comprehend that there are numerous and valid information resources that are nontechnologically driven. There is a public expectation of a high level of technical expertise among library staff. However, it is equally clear that the public has not accepted the notion that there remain other avenues of approach when seeking information. That has certainly been a challenge to the reference librarian, who, when conducting the reference interview with a patron expects his or her suggested resource to be an electronic one, may still receive an answer using a better and more trusted *print* resource. The librarian may even have to explain *why* the resource being suggested is a print one. Thus, the public expectations and the realities must indeed be balanced with the librarian serving as the trusted and respected guide through the abundance of reference resources that are available to the public, whether electronic or print. As much as there has been written about how the reference interview was going to be conducted in the Internet age, and how the electronic resources would replace print ones, that simply has not happened and many of the tools librarians use remain the same. For the librarian, there is much more to be aware of regarding the *number* of tools available in each format. We have *added* more to the librarian’s toolkit. We have not reduced it.

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With a national increase in library visits, it becomes incumbent upon library staff to participate in continuous education and learning in order to keep pace with the public's use of their libraries. Returning tens of thousands of search results from an Internet search is as useless as not finding anything at all and librarians can, and do, provide this expert guidance to provide and properly manage the information search. However, the question remains, "How does today's librarian find time to access continuing education when there is so much more to do?"

According to the American Library Association,

While communities across the country plan their annual celebration of National Library Week [April 18-24], public library visits have reached an all-time high. In the past decade, visits have more than doubled to almost 1.2 billion, and a record-setting 1.79 billion items were borrowed from libraries in one year alone.

This picture has placed an enormous amount of pressure on library staff to satisfy their institution's training and education requirements wherever and whenever they can. While e-learning may not be their first choice to satisfy that need, it may well be their *only* choice.

If, that is so, and e-learning is a librarian's only training choice, there are challenges to be met, not the least of which is technofear or the simple inability to physically connect with a human learning source. To that end, the UCLA extension program offers a somewhat Kafkaesque scenario regarding the very real fear of the adult learner entering the often baffling world of e-learning environment on his or her first day:

There's a large corkboard on one wall and across the room is a row of twenty or so lockers, each with a person's name on it. Each locker has sort of a mail-slot large enough to deposit notes or similar items. On the corkboard is a friendly note to the class from your instructor along with a copy of her lecture. Your instructor invites you all to come back within the next few days and pin onto the board any questions or comments you have about the lecture, the class, or anything related to the class.

This scenario, while ostensibly extreme, can be very real to those entering the realm of e-learning. After all, the contact appears in the omnipresence of e-mail or chat and the materials for the training are all available online. There is no personal collegiality with classmates, except through virtual means and here only written

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contact with the instructor, or at worst, there is no instructor at all and the material is simply established as a series of online lessons to which one must interact through a series of click-through modules. It appears cold and impersonal. However, in reality, there is actually *greater* and more sustained connection by the e-learning student than the traditional classroom student.

In an e-learning environment, students may find that there is an expectation that, because there is no direct synchronous encounter between student and instructor, that the assignments will be uncomplicated and less demanding. The challenge in this case is to create an understanding in the student that, because there is no physical manifestation of an instructor to lead or guide the class, there is no discipline involved in taking the class, nor little demanded of them to complete it.

In order to avoid such a perception, it is imperative that students in an online environment understand at the outset that this observation is entirely incorrect. E-learning must be viewed as a visible and constant presence so that the students grasp the concept that the expectations of them completing their work, as self-motivated individuals, are just as important as if there was an instructor standing before them. The student must also appreciate that in the system of asynchronous e-learning, the student must assume responsibility for his or her own interaction with expected course activities. The course syllabus and schedule are very structured in terms of timelines, deadlines, participation, and attendance. If the learner's tendency is to procrastinate, or if the learner is not self-motivated, then this is not the appropriate learning platform for him or her. Finally, if the learner simply does not have the time to devote to the online course, which will inevitably require multiple postings each week to satisfy the participation requirement, then this is definitely not the appropriate learning platform for him or her.

Attendance and active participation is even more of a challenge in the online environment than it is in the traditional classroom simply because in the former, there will be students who are uncomfortable not only with the course content and its required assignments, but with the online technology itself. This may pose an additional challenge for the instructor, for it may compound a student's unwillingness to participate appropriately. The students may think of themselves as less qualified to learn in such an environment because of their lack of technical expertise, and they may fear that this inadequacy may hamper their progress. This could pose an additional challenge simply because of the enormity of the time expenditure that may be necessary for individual students to become experienced with the

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technology aspects of the course, to then finally become comfortable enough with the environment so that they may function adequately. So, it becomes the added responsibility of the e-learning courseware to be as intuitive and user-friendly as possible so as not to turn off perspective students.

While it is the task of the provider's information technology support department to serve as a resource for questions regarding technological support, the student library learner's first contact when a course begins is the training coordinator or human capacity development specialist in his or her own library. The role of that individual is to provide guidance for the course and/or workshop opportunities that are available to the library learner. If the "live" classroom training is not an acceptable option, e-learning may indeed be the choice for that person.

Once engaged in the e-learning course and/or workshop module, it is the duty of the instructor to provide guidance to students who are having difficulties with the technological aspects of the course, but there may be little more than a help desk to assist students, offering support, but little in the way of individual instruction. Questions that may appear to have obvious answers to the fully trained instructor may not be as obvious to students. So, such actions as posting messages with attachments, understanding when to use a threaded message as opposed to a stand-alone message must be explained.

For library learners with limited computer skills, they may require additional guidance regarding the e-learning modules in which they are expected to work. For example, if a student understands that Microsoft Word and Microsoft Excel is preinstalled on his or her computer, he or she may not be aware that Microsoft PowerPoint is installed as well, and never would have learned to use it unless required to do so. So, if a course or workshop assignment requires PowerPoint, they may ask where they can purchase such a software product, not knowing that they already have it with them. So, in addition to instructing students in the content of the training course, there may well be a considerable effort involved in being comfortable with the technology as well.

Often, in the online setting, courses may be compressed into as few as four or five modules. Unlike the traditional classroom where there may be a single class meeting for several hours, the online classroom requires the student's presence more often so that completion is achieved in a reasonable amount of time. There is also often the expectation that, in certain courses and or workshops, because there is no instructor monitoring the student's progress (since the course or workshop may be completely

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self-guided), that one does not have to expend a substantial effort into completing the assignments in as timely a manner as the traditional classroom student, then he or she may wish to reconsider their choice, and return to the traditional instructor-led classroom.

Active participation in an online course may also be defined much differently from that of the traditional classroom student. For example, participation in an online course is not simply a student's cursory online posting of a greeting to one's classmates, or a discussion about the weather in his or her location. In addition to completing the assignments, the student must read, analyze, and respond to the questions and comments posed by the course syllabus, and, if possible, interact with the allied chat rooms associated with each particular module of learning in a mediated chat room setting. In other words, students are expected to do more than just submit their assignments; they must enthusiastically participate in the coursework and in the chat rooms in order to fully receive the value of the course.

An additional challenge to communication and, thus, to learning as well in the e-learning environment can be the concept of proper online etiquette, or "netiquette." According to author Virginia Shea, there are ten basic rules of netiquette:

Rule 1: Remember the human.

Rule 2: Adhere to the same standards of behavior online that you follow in real life.

Rule 3: Know where you are in cyberspace.

Rule 4: Respect other people's time and bandwidth.

Rule 5: Make yourself look good online.

Rule 6: Share expert knowledge.

Rule 7: Help keep flame wars under control.

Rule 8: Respect other people's privacy.

Rule 9: Don't abuse your power.

Rule 10: Be forgiving of other people's mistakes.

Adult learners often have a great deal of "real world" knowledge. Such a wealth of experience is a great benefit to the staffer participating in e-learning to offer in their selected courses. Students come from an array of backgrounds, and often enter class equipped with a complete toolkit of experience learned in the workplace. Such

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experience can serve to greatly benefit them as they may often be able to readily relate “real world” experiences into all activities and discussions.

Although e-learning as a concept may be considered by the library as a replacement for traditional classroom education and training, the statistics have not supported it. It is the rare institution where greater than 30 percent of the staff participate in online learning. That figure may not rise in the foreseeable future as the popularity of the “blended” learning model, involving a planned combination of approaches has taken hold as the preferable method of providing staff with lifelong learning opportunities.

When adult students enter the online learning environment, many of them expect a similar setting. Unfortunately, the truth can appear very different from the expectation. Depending on the vendor selected by the library and the online learning system (OLS) selected, learning platforms may be very different in look and feel and functionality. Therefore, often, the training coordinator can serve as the primary guide to direct the library learner in understanding how to successfully negotiate the OLS that has been selected. Even if there is a selfguided training module that can serve to teach the library learner how to negotiate the OLS, depending on one’s own learning style, it may be more beneficial to be “walked” through the system by a “live” trainer.

In addition, if an individual arrives with the expectation that there is less work in the online environment, and that one does not have to expend a significant effort into completing the assignments, then he or she may wish to reconsider his or her method of study. The fact is, there is a great deal more work and interaction among the students in the online environment than there is in the classroom setting. After all, when students attend class in a classroom setting, they will generally attend a single evening each week. However, in the online learning environment, where student interaction may be required as many as four or five days each week, the continuous learning environment of such a class may simply prove too difficult for some students to handle, especially if that student has not been in a classroom for some time in recent years.

Though the content of an online course may be enough to dissuade the student to continue, especially if that student has not written much in recent years and finds himself or herself in a situation where writing is the primary method of communication, it may simply be the technology that blocks the learning process.

It has been said that when the economy goes south, registrations in higher education go north. If that is the case, then the number of students entering the higher

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Bruce E. Massis

Excerpted from *The Challenges to Library Learning*

education online environment will lead to a flood, not only of inexperienced students, but also of inexperienced computer users. For the online facilitator, such a double-edged level of inexperience can be a deadly combination, both for facilitator and student. The facilitator ends up expending almost as much effort in working with the student in learning how to technically negotiate the online environment as one does working with the student to properly prepare his or her assignments.

In a white paper written by the OCLC E-Learning Task Force, the need for e-learning opportunities in libraries was expressed:

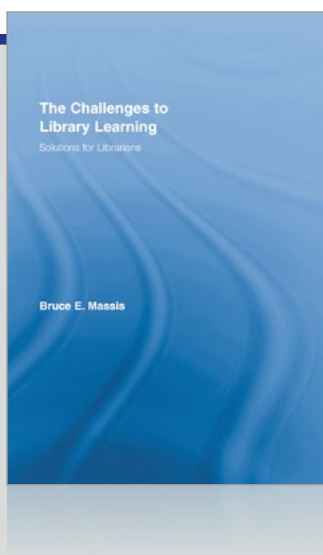
The Task Force also voiced a significant need for better and more focused training—for librarians, for faculty and for students. The challenge of establishing relevant, yet scalable training is not new to librarians and there is now the possibility of embedding training support within the learning management system as a part of the learning activity. The idea of “just enough-just-in-time-just-for-me” was seen as a desirable objective.

This leads to a challenge for the library training and development program design team. Because the fragile financial nature of libraries today dictates that staffing levels in many libraries are likely to continue to remain flat or even decrease over time, it is still reasonable to expect that 70 percent of training continues to occur outside of the library using the standard instructor-led classroom model. However, the approximately 30 percent of those who embrace e-learning will do so out of necessity as much as desire. This level of engagement in e-learning (30 percent) has not varied much in the last decade in the workplace, and it may take a generational shift to increase this percentage.

Finally, in order for staff to be successful, e-learning must be easily accessible, comprehensive, applicable, and meaningful. If these factors are in place, the library can then move forward with this component of the blended library learning program for its staff.



DEVELOPING A PERSONAL LEARNING PLAN



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THE CHALLENGE—CREATING AND MAINTAINING A REALISTIC AND PRACTICAL LEARNING PLAN

WHAT IS A PERSONAL LEARNING PLAN (PLP)?

The PLP is a means by which each employee can establish his or her own *realistic* roadmap to success as a learner. Certainly, the key word in this challenge is “realistic.” Creating a *pie-in-the-sky* scenario can be a recipe for disappointment. Creating the PLP should be an annual event for each and every library learner.

At the start of each year, the learner establishes, along with his or her supervisor, a goal-oriented structure to continuous learning that is predictable, manageable, and outcome-based. That is, each individual must develop this plan with the intention of completing all that he or she sets out to do. Intentions can be derailed, given the workloads of most of us; however, if the PLP is linked as a human resources function to the annual performance review, there will be additional incentive, both philosophically and monetarily to complete one.

The PLP is a practical plan to help establish the parameters of learning for the entire year. The concept of the PLP should be implemented at the organizational level for all employees working in the library. Therefore, a template must be developed by the organization with an eye toward personalization by each employee. Although the focus in the PLP is on the word “personal,” the other two terms in this concept—“learning” and “plan”—carry equal weight and validity.

If the goal of an organization is to create a continuous learning environment in the workplace (*workplace as learning place*), wherein the mission of the library itself serves as the driver for staff learning must be developed, then this awareness can become a guiding principle for the organization and a touchstone for both the library and its employees.

BASIC STEPS FOR PREPARING YOUR LEARNING PLAN

In preparing the learning plan, there are a number of activities, suggested by author Hal Macomber, one should complete or accomplish in order to be successful. Starting with the individual’s goals within the structure of the organizational goals, each employee should be encouraged to reach these goals with the expectation that the completion of continuous education established at the beginning of the year will be an important element under consideration during one’s annual performance evaluation. Once the template has been established organizationally, then it becomes



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the responsibility of every employee to adhere to it in order to work one's way through to the plan's completion. However, it then becomes the responsibility of the organization to develop and utilize the appropriate assessment tool in order to properly and fairly assess the success of the individual. A number of tools have been developed for this use.

A particularly effective assessment tool can be one that considers one's goals and individual priorities for the year in consideration of (1) institutional, (2) professional, and, of course, (3) personal development. In order to indicate a comprehensive and well-developed structure, descriptions of how the goals will be achieved and measured should also be included in the PLP.

THE SMART MODEL

The SMART PLP model can offer an effective and flexible means of implementing the PLP. The acronym, SMART, is defined as specific, measurable, achievable, relevant, and timed. Although to some, this method may appear overly structured, this template offers flexibility and creativity for the learner because it allows the learner to carefully consider each step in the model and plot the strategy he or she will find it best to employ based on one's particular skill level.

Specific

Provide enough detail so that there is no indecision as to what exactly you should be doing when the time comes to do it.

Measurable

Your goal should be such that when you are through you have some tangible evidence of completion.

Acceptable

Your goal should be set by you rather than by someone else. You know best your strengths and weaknesses, and you can use this information to maximize your chances of success.

Relevant

Do not plan to do things that you are unlikely to follow through. Give yourself some flexibility.

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Timed

Say when you plan to work at your goal, for example, between 4 and 5 p.m. Anything that will take you more than two hours to complete, break into smaller, more manageable chunks.

YOUR PLP

The following information is designed to help you define, plan, implement, and document your learning. By preparing a learning plan, you develop a systematic approach to learning a skill or competency. The following questions will help you identify the key components of your learning plan, and the chart is a tool to “map” and document your plan.

1. *Topic or area of learning.* What skill, competency, or area of knowledge do you want to develop?
 Example A: I want to improve my ability to evaluate staff work performance.
 Example B: I want to become more proficient with using desktop applications.
2. *Current level of skill or competency.* What are your current skills in this area?
 Example A: I know how to identify strengths and weaknesses in staff performance and I generally know how staff members might improve their competencies.
 Example B: I know how to use word processing programs.
3. *Need.* What gaps or areas for improvement do you see?
 Example A: Our current approach to performance appraisal does not foster effective and meaningful communication between the supervisor and the staff about work performance.
 Example B: I do not know how to create spreadsheets.
4. *Learning goal.* Based on the need(s) you have identified above, what do you hope to accomplish as a result of your learning activity? (Be as specific as possible about what you will be able to do after completing your learning activity. When stating your goal, avoid terms that can be vague such as “understand,” “know,” and “learn.” Use action verbs to describe your goal and focus on the results of your learning.)
 Example A: I will identify at least four new approaches for conducting performance appraisals. I will also assess which approach would work best in our library.
 Example B: I will create a spreadsheet for monitoring our department’s budget.

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5. *Strategies and resources.* What strategies and resources can be used to meet your learning goal? Which strategies and resources are the best matches for what you want to learn? (Be creative in thinking about possible learning strategies and resources. It is often helpful to brainstorm possible strategies and resources with colleagues.)

Example A: Conduct a literature review to identify new models and approaches for performance appraisal. Interview five managers in other libraries who have similar responsibilities to learn about different performance appraisal strategies and methods.

Example B: Complete an online tutorial on creating spreadsheets. Practice creating sample spreadsheets for one hour each week for four weeks.

6. *Time frame.* When will you begin and finish your learning activity?

Example A: Complete the literature review during July 2007. Conduct interviews during August 2007. Meet with other supervisors and staff in our library to evaluate the different approaches and models during September 2007. Recommend a different approach for performance appraisals in October 2007.

Example B: Complete the tutorial during July 2007 and practice new skills during August 2007. Transfer monthly budget reports from paper format to electronic format in September 2007.

7. *Evidence of learning.* How will you know when you have reached your learning goal? (Describe what you—and perhaps others—will observe.)

Example A: I will prepare a report and recommendation about a revised or new approach for conducting performance appraisals.

Example B: The department's monthly budget reports will be maintained and produced electronically.

A PERSONAL COMMITMENT TO LEARNING

Clearly, a fundamental condition of a successful PLP requires that the individual views his or her commitment to the program. This requires a personal vision that stretches out long after a single year has passed. It is recommended that one prepare one's PLP in the manner of a "living" document wherein the ability to revise and update it becomes a guiding force in its validity. There are hundreds of examples of the PLP template available on the Web. Although the data elements included may slightly differ from those designed by the library for its employees, this form can be used by the employee as a personal and flexible document that may be consulted throughout the year and updated, as necessary, to meet the goals of each individual's PLP.



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In many examples of the PLP, the form is divided into three distinct sections. The results of each area of lifelong learning will affect the individual, the organization, and one's colleagues, supervisors, and staff. The first section of the PLP will often indicate the manner in which the employee's learning will impact the institutional and departmental goals. The second section will address one's professional development goals (it is in this section where the courses, workshops, e-learning opportunities, Webinars, podcasts, certifications, and the like participated in by the employee will all be documented. Finally, in section three, one's "personal development" is acknowledged and documented where one's personal goals and expectations will be documented.

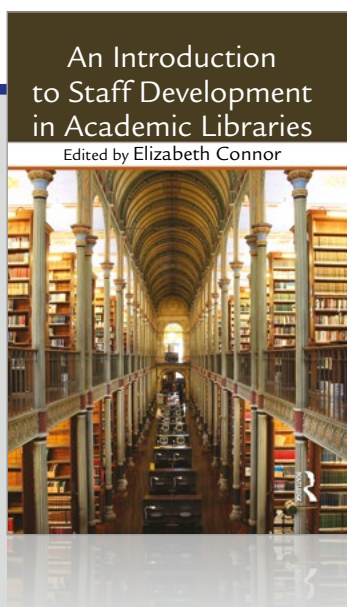
This manner of self-assessment provides a clearly understood roadmap to the attainment of success in continuous education. A significant ingredient in each section of this document is the "measurement" component wherein it is expected that each employee is able to indicate his or her own measure of success. Communication with one's supervisor is critical in measuring the success of lifelong learning because there may be areas where measurement of success may be assessed at a different level by the employee than by one's supervisor. It also serves as a discussion document for managers and staff to meet periodically in order to check up on the progress of the staffer. Inclusive discussion may alleviate any disconnects.

The PLP serves as an extremely empowering individual document for each employee that, once implemented, will set the foundation for the lifelong learning for each employee in manageable, realistic, organized, and measurable portions.



FORMALIZING STAFF DEVELOPMENT

FROM INCEPTION TO
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Academic Libraries*

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INTRODUCTION

This case study traces the formalization of staff development activities at a large public university library. While every organization offers some variety of training to meet its needs, the degree of formal structure can vary greatly. The arrival of a new Director of Libraries brought this function and others into the spotlight by creating task forces charged with examining needs and outcomes. This case study examines one library's staff development structure with a long lens, since available historical documents allow reporting of events prior to, during, and subsequent to the work of the task force—from inception to implementation and beyond.

SETTING

The University of Central Florida Libraries (UCFL) is a system that supports a rapidly growing metropolitan university in a region with a population exceeding two million. The 1,445-acre campus is located thirteen miles northeast of downtown Orlando. UCFL includes a Curriculum Materials Center on campus, a subject-specific library focused on hospitality materials located near the Disney attractions, and several joint-use libraries around the state. The main library, housed in a 200,000 square foot facility, has a collection of 1.6 million volumes, 16,000 serial subscriptions, 7,400 electronic journals, and is a partial depository for US and Florida documents and US Patents. The 2006 library budget is approximately \$12 million. The student population in 1999 (when the Staff Development Task Force discussed herein was convened) was 30,000; in the fall of 2007, it approached 47,000. Library staff increased during that time frame from 100 to 130 full-time equivalents (FTEs).

HISTORICAL BACKGROUND

As early as November 1992, staff development concerns were being discussed in various areas of the Libraries. Minutes from an Access Services Department meeting identified the following needs and issues related to training:

- Provide ongoing training for support staff;
- Consider adult learners' needs;
- Develop content for library basics and call numbers as well as advanced topics;
- Gather staff input on their needs;
- Define acronyms;

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- Identify a list of essential skills that all staff would be expected to learn or update;
- Specify training responsibilities and propose a coordinator position or distribute the work among employees;
- Have librarians and support staff work together to create training in each area.

Individuals responded to these identified needs by arranging programs, but no formal coordination was built into the organization and no additional resources were allocated. UCFL had a long history of sporadic and uneven support for staff development and training. Administrative financial support for travel, conferences, and workshop activities was available at various levels upon request and with a supervisor's approval. The annual discretionary travel budget for each librarian was fairly well established and had increased over the years. UCFL provided release time and registration fee support for various off-campus events such as attendance at the state library association meetings. "In-house" sessions ranged from casual events such as monthly brown bags ("bring your own lunch" discussion meetings) to sponsorship of campus-wide affairs, including invited speakers or subsidized teleconferences. The Staff Orientation Series for new employees was coordinated by the Libraries' Personnel Officer as needed on an infrequent basis.

OBJECTIVES

In January 1999, the Director of Libraries created several task forces to address various issues. The relevant one for this discussion was the Staff Training and Development Task Force, which immediately changed its name to the Training and Employee Development Initiative, thus allowing members to refer to themselves as the TEDIs and use a bear logo as a unifying icon for their work, incentives, snacks (Teddy Grahams®), rewards, etc. The TEDI charge was to conduct a needs assessment of staff development and training issues. TEDI was to look at types of programs (orientation, ergonomics, technical, non-technical, etc.); types of venues (on- and off-site workshops); "train the trainer" sessions, expert consultants, local and campus organization offerings, etc.); and audience (student assistants, staff, supervisors, managers, etc.).

By May 1999, the Director expected the group to have prepared a report with recommendations about what was currently lacking, what should be done about it, what should be included in a comprehensive program, who would coordinate the efforts, and who would participate. He emphasized that the task force should not limit its vision by predetermining what might be possible in terms of budget or

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staffing. The Director also stressed that the task force should continuously share information and progress with the entire library staff. He suggested the possibility of group meetings or focus groups during the needs assessment phase, seeking out what worked elsewhere or what new staffers felt was lacking during their own orientations.

The task force members began their deliberations by conducting a literature review and discussing information gleaned about the fundamentals of staff development. A number of comprehensive sources covered program essentials, including planning, funding, sponsorship, needs assessment, curriculum content, core competencies, training methods, and training evaluation. This background reading informed decisions throughout the work of the task force.

At subsequent task force meetings, the group created ground rules for successful team work, identified another group goal of stimulating staff interest in training, and finalized methods for conducting a needs assessment. The preliminary needs assessment took the form of a staff survey (see Appendix 4.A), which was distributed with pay checks to all faculty, support staff, and student assistants. The task force conducted other, smaller surveys, identified issues and core curriculum preferences, and reported recommendations as requested. The Director and department heads reviewed, approved, and supported selected recommendations.

METHODS

The needs assessment survey was distributed to 254 employees, including student assistants, and 60 completed surveys were returned. The low return rate of 23.6 percent did concern TEDI; however, the returned surveys represented 50.7 percent of support staff. The committee chose to proceed by interpreting the results primarily in terms of support staff recommendations. In future library-wide assessments, student assistants would not be included. A review of the returned Preliminary Needs Assessment surveys generated the following observations from TEDI members:

- All the content items were checked as important. (Lesson learned: the yes/no option would be replaced on future surveys by a Likert rating scale.)
- Comments on surveys were more about the process of training than about training content.
- Employees used this as an opportunity to vent about non-training related issues. Some comments were forwarded to the Vision and Program Review Task Force.

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- In evaluating barriers to training, there were obvious differences among library departments.
- As a result of comments about specific supervisors, the TEDIs realized that they needed to discuss supervisors' participation at some point, perhaps as part of implementation.
- Student assistants' training needs were better evaluated departmentally, not library-wide.
- Terminology needed to be considered for uniformity and sensitivity. If the term "staff" was used generically, it left people wondering if faculty were specifically excluded. Using the term "professional" to refer to MLS librarians caused problems for some people because it implied that others were not professional. (Lesson learned: future surveys referred to "faculty," "staff," and "faculty and staff.")
- Frequent reference to lack of time revealed this as an underlying problem.

SURVEY AND FOLLOW-UP

TEDI shared the general survey results with the entire library staff, but distributed only the numbers of responses to yes/no questions while excluding the very numerous comments and suggestions. The entire detailed results, however, were available in a public location to anyone who wished to view them. TEDI learned that follow-up surveys would be more meaningful if they required employees to rank and prioritize content offerings. Additionally, the task force discovered that it is important for people to be given information about both delivery methods and the process for providing training when they are making decisions about training content.

STAFF DEVELOPMENT IMPLEMENTATION ISSUES

TEDI evaluated implementation issues that would need to be addressed in terms of the realities of budget and staffing. While the Director did not want the group's visioning to be inhibited by financial constraints, experienced members were aware of the difference between visioning without limits and implementing within realities. Three main issues dominated the implementation discussions: responsibility, content delivery, and accountability.

In terms of responsibility, the main issue was that the library did not have a training officer at the time of the survey and existing personnel expressed concerns about

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accepting additional duties. As to content delivery, TEDI members favored the idea of purchasing a special collection of multimedia training materials, since that provided a multiplicity of delivery options, including self-study. For accountability, the concepts of a core curriculum, grouped “tracks” of information similar to conference organization, and possible certificate programs were all considered. The group realized that if a certificate program could not be linked to financial rewards, it would probably not be considered an incentive.

In order to encourage maximum participation in programs, TEDI favored a mandatory core curriculum with required courses noted on job descriptions. The concept of required courses including a mandated core curriculum did not survive administrative review, however. TEDI later acknowledged that even if training were incorporated as part of the position description, it would be better implemented as an annual goals-based discussion between the employee and the immediate supervisor.

TEDI FINAL REPORT AND RECOMMENDATIONS

DESIRED OUTCOMES

As part of the final report to the Director, TEDI identified a number of anticipated outcomes that would be advantageous to both the organization and its employees. With a formalized approach to new employee orientation, UCFL would benefit from increased interdepartmental cooperation, understanding, and awareness among staff of the interrelationships and functions of the various activities and services of the Library. Through appropriate application of cross-training, there would be improved departmental flexibility and coverage. Formal structure would also increase the participation of all employees (director through students) in training opportunities, provide equitable opportunities for all staff to participate in training, and involve supervisors and department heads in employee development. Additional expected rewards to the organization would include increased ability to meet current and future needs of users and employees; efficient use of resources; provision of better service; improved staff morale; increased employee retention; and more creative and capable employees.

UCFL employees, for their part, would experience improvement in morale, confidence, and job satisfaction plus a reduction in stress. They would also enhance their job performance, broaden their vision, upgrade their skills and abilities, and heighten their ability to change and to take advantage of new career opportunities.

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METHODS TO ACHIEVE DESIRED TRAINING OUTCOMES

TEDI identified two primary mechanisms for realizing the desired outcomes. The first recommendation was to create a new department that would assume responsibility for staff development. The second was to recognize staff training and development as a UCFL goal that would be strongly supported and implemented by department heads until a new department charged with staff development could be organized.

RECOMMENDATION 1: CREATE A STAFF DEVELOPMENT DEPARTMENT

TEDI felt strongly that there should be a unit designated with the responsibility for staff development and it offered options about reporting structure and possible areas of responsibility for the new department. In many libraries, including UCFL, it would be a luxury to have an entire department dedicated solely to staff training. Other duties considered by TEDI that could be combined with training included new employee orientation, library instruction, distance learning, electronic resources, research consultations, or coordination of written pathfinders. All these options would depend on the unique talents of the person selected to coordinate staff development.

Staffing options considered included filling the proposed department head position with a current faculty librarian in an “acting” status, hiring a temporary adjunct librarian, or starting a national faculty search immediately. The group also suggested the possibility of employing a staff person who would work half-time in the Systems and Technology Department and half-time as a technical trainer in a new Library Instruction and Training Department. TEDI acknowledged that coordinators for some or all of the broad areas in the new department would be needed, as would administrative support staff. The task force also recommended that the existing TEDIs would continue to serve in an advisory capacity for input, not evaluation or control, for at least one year.

TEDI identified two possible goals and objectives of a new Library Instruction and Training Department related specifically to staff development and training. The first broad goal would be to manage the staff development and training program activities. That would involve planning additional needs assessments, goals, and a budget, as well as monitoring and reporting outcomes. Managing would also include developing a curriculum and programs, plus coordinating activities, promotion, and publicity. This goal also includes actually providing training, training other trainers, mentoring, and facilitating use of self-study resources. The second broad goal would be to serve

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as the liaison with local and regional training organizations, the University's Human Resources Department, UCFL department heads, supervisors, and staff.

Delivery Methods

Based on the preliminary survey and other input gathered by TEDI, the following list was created of possible delivery methods or projects specifically related to staff development:

- Multimedia "training library" for self- or group-study;
- One training session developed per year, per supervisor;
- Web page for centralized publicity and calendars;
- Web-based training;
- "Do-Drop-In" (scheduled training not requiring pre-registration);
- "Quick Flicks";
- Journal clubs;
- New employee checklist;
- Orientation information packets;
- Staff recognition awards;
- Training "tracks";
- Training newsletter;
- "Field trips" within and outside of the library;
- Invited speakers.

Content

Several broad categories of subject content were identified from the needs assessment survey: managerial/supervisory; personal/professional development; job-specific or technical library skills; electronic library resources; basic computer hardware and software; new employee library orientation; and health and safety. For a detailed list of course topics, see Appendix 4.B.

RECOMMENDATION 2: FORMALIZE TRAINING GOALS

The second proposed method for achieving the desired outcomes (if a new department could not be created) was to recognize staff training and development

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as a UCFL goal that would be strongly supported and implemented by department heads. TEDI proposed that this would be accomplished by having the Director support the plan and communicate its importance to department heads. TEDI would explain the plan and seek input from department heads and would then communicate the plan to and solicit feedback from all staff. The Director and department heads would individually discuss goals regarding staff development and training for each department for the following evaluation year. The department head would be evaluated in part based on successful achievement of staff development and training goals set at the beginning of the evaluation year.

RESULTS

STAFFING, BUDGET, AND EVALUATION

UCFL partially implemented TEDI's recommendations, based on resources available at the time. Although the task force proposed a full department with various optional responsibilities, the actual implementation consisted of creating a coordinator-level position within the existing Administration Department with support from department heads as described above.

A Staff Development Coordinator (SDC) position description (see Appendix 4.C) was created for a 0.4 FTE librarian; this position was filled in January 2000. In this case, the staff development functions consumed approximately 40 percent of the librarian's time, or approximately sixteen hours per week, while 60 percent was dedicated to other human resource functions such as recruiting, hiring, separation, evaluations, and supervision of payroll. Additionally, the original TEDI members continued to serve in an advisory capacity for the first year of implementation.

A budget was provided to acquire a collection of materials, which are advertised on an internal website. A record 60 programs, more than one per week, were offered during the first year. An interactive, online shelving training website was produced the second year. The staff development website continues to function as an organizing tool to convey both policy and operational issues such as the purpose and scope of the program, curriculum and calendar, types of training, and links to specific course materials.

Programming was evaluated and adjusted according to feedback in succeeding years. The first follow-up survey was conducted in February 2002, with 115 surveys distributed and 52 returned, for a 42.5 percent response rate. The most notable result was the request for more live training. This is understandable since the initial

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programming emphasized use of the purchased collection of training videos primarily published by CareerTrack. The second follow-up survey was conducted as part of the Administration Department's customer survey in December 2005. The survey design compared how effectively the service was delivered to how important the service was to staff members. The survey also allowed for comments; however, it only contained three questions related to staff development. The notable result from this survey was dissatisfaction with timely scheduling of new employee orientation.

ORIENTATION

New employee orientation at UCFL continues to be a challenge despite experiments with a variety of approaches. A very detailed checklist that was being used even before TEDI convened was updated and revised by the SDC. The checklist (see Appendix 4.D) identifies items that should be prepared before a new employee arrives, information that needs to be shared on the first day, and other information and meetings that vary with the hiring department. In addition to the checklist, the SDC also arranges orientation meetings with UCFL administrators and with representatives of all other departments. These sessions normally last 60 to 90 minutes on five days, spread over one to two weeks. The typical orientation would begin with half an hour dedicated to the Administration Department. The same session might proceed to Acquisitions, Collection Management, and Special Collections Departments for ten to twenty minutes each. On day two, the new employees would visit the Interlibrary Loan, Circulation, and Cataloging Departments. Day three might consist of Reference, Government Documents, and Curriculum Materials Departments, and so on. Special sessions would also be scheduled to demonstrate the online catalog, databases, and web pages.

Depending on the number of newly hired employees and the amount of time elapsed between hire dates, the orientation sessions could be less than cost-effective. Even with a full-time staff of 130 FTEs, turnover is neither predictable nor regular. On many occasions the SDC would be scheduling administrators and department heads to meet with a very small group of new employees. Even though the sessions were not optional, there were times when only one new person would attend. On other occasions, if sessions were only scheduled when a large enough group of attendees might be assembled, then the sessions were not viewed as timely and relevant by the new employees.

In mid-2006, the New Employee Orientation schedule was changed from "as needed" to a regular monthly arrangement. According to the new plan, each of the twelve

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months would be assigned to a different department to host an educational open house. New employees were expected, and seasoned employees were encouraged to attend these orientations offered by the “department of the month.” This program was re-evaluated after seven months. Scheduling issues and small attendance continued to plague the orientation sessions. The UCFL management team at that point agreed that orientations would be the responsibility of the hiring supervisor. New faculty librarians (not support staff) continue to have individual meetings with each of the Libraries’ department heads, but the group departmental orientations have not taken place since August 2006. This method works as long as department heads are accountable for the successful orientation of all their new employees.

One very helpful by-product of the TEDI work is a detailed staff directory entitled *Who Does What?* This continues to be a helpful orientation tool since it is arranged alphabetically by department and includes all names and phone numbers. Along with the directory information, the major department functions are grouped and defined and the initials of the appropriate contact person are included. This makes it easy for new employees to look at the Administration Department page, for example, find the Human Resource functions, and next to that, locate the initials of the person who can help with payroll or training questions. The initials match the full names and contact information at the top of the departmental page.

PROGRAMMING

TEDI successfully obtained approximately \$10,000 to purchase a collection of books, pamphlets, CDs, videos, and cassette programs, some with facilitator’s guides. These materials are listed on a staff development web page and can be checked out by individuals or departments for three weeks. The SDC immediately began previewing the programs in open “lunch-and-learn” sessions that all library employees were free to join in. In the first year, fiscal year ending 2001, 60 programs were offered, including 31 video discussions and 29 guest presenters. In subsequent years, 30 to 40 programs have been offered. With assistance from the Library Systems and Technology Department, the SDC created a database to track training and to record and report attendance. The database enables inputting and tracking of all types of training, including department- specific programs. With the recent implementation of a new integrated library management system, the emphasis has migrated away from managerial and developmental training topics to unit- and technology-specific training.

The education, background, and personal preferences of the SDC allowed for the creation of a variety of customized training sessions. With input from various

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librarians and department heads, the SDC led the development of UCFL Service Standards training and pamphlets. The Coordinator created customized programs on communication skills, meeting management, job and process analysis, training, delegation, goal setting, job satisfaction, and change management.

Given that the staff development program at UCFL is open to contributions from all library employees, supervisors, and committees, a wide variety of interests can be met in-house. In summer 2007, for example, the Digital Services Librarian instigated and coordinated a summer-long interactive Web 2.0 training program based loosely on Helene Blowers' Learning 2.0 project. This particular librarian's initiative, paired with her interest in and exposure to the newest technologies, formed the basis for UCFL's current self-paced learning experience. Similarly, the faculty mentoring committee has organized and delivered many programs specific to faculty promotion needs.

PARTNERS IN PROGRAMMING

As a result of high demand for broad "soft skills" programming with a library perspective (such as the Service Standards sessions mentioned earlier), the SDC was able to expand the audience for some of the specific programs developed for UCFL to other local libraries' employees through a relationship with the Central Florida Library Cooperative (CFLC), one of six regional Multitype Library Cooperatives covering all of Florida. CFLC, in turn, is a remarkable source of high-quality library-specific training. UCFL has availed itself of CFLC programs, both by bringing their offerings to the campus and by encouraging staff to attend sessions at CFLC training sites. CFLC programs cover all the latest technology and applications, including Web 2.0 function (blogs, podcasts, wikis, folksonomies, and the collaborative web); the full range of the more traditional Microsoft Office products plus other software (Dreamweaver, Adobe Acrobat); Web authoring topics such as HTML, XML, RSS, Flash, cascading style sheets, and more; plus many other library-specific topics not necessarily related to technology.

Other sources of formal programming include many campus offices such as the Human Resources Department, Continuing Education Department, Diversity Office, Faculty Center for Teaching and Learning, and Disputer Resolution Services. The SDC also arranges library training such as book repair, cataloging, and service assessment through the southeast regional provider South-eastern Library Network (SOLINET). Using today's technology, Webinars and teleconferences with nationally recognized speakers are scheduled for individual and group viewing through the

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American Library Association, the Association of College and Research Libraries, Sirsi/Dynix, WebJunction, and the College of DuPage.

MORE SHARED LEARNING

One other innovative experiment was a monthly program specifically envisioned as a "Supervisor's Tool Box" series designed to be a working group for front-line managers. The program content was designed to explore problems, but the real focus became the name of the group, "Solution Seekers." The topics in this series included: new employee orientation, clarifying expectations, training before delegating, performance evaluations, situational leadership, student hiring procedures, and so on. The scheduled classes and descriptions were announced on the UCFL intranet site and twenty-seven employees attended the first session. The sessions were largely interactive and were planned around content and handouts designed to stimulate discussion. The intent was for experienced administrators and department heads to share knowledge with newer supervisors using a loosely structured agenda. After about six months, the audience had dwindled to an enthusiastic few, not many of whom were experienced managers. The regularly scheduled discussion group meeting times were gradually converted into other prearranged programs and the work group concept was not revived.

CONCLUSION

A formal strategic planning process at UCFL concurrent to the work of TEDI generated two specific statements in the 2000 UCF Libraries Mission, Values, and Vision document that were most relevant to creating a formal Staff Development Program: 1) to build an organizational structure and processes that anticipate and accommodate change and growth, encouraging feedback at all levels, and 2) to enrich the work experiences of library employees. The declared purpose of organizing the formal Staff Development Program at UCFL described herein was to guide all library employees in identifying and fulfilling their training and development needs in order to ensure individual and organizational success. The allocation of resources for staff development was one method used to support and realize action items identified in the strategic planning process.

The role of supervisors, managers, and administrators is critical to the success of a staff development initiative, given that they retain primary responsibility for job training for their employees. Only library directors can ensure consistent

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commitment, positive attitude, and participation in such formal programs by linking training goals to the evaluation process. The supervisors determine training needs and communicate to employees why they should participate. Supervisors also facilitate participation by finding replacements to cover for the employee and by being flexible in scheduling release time. It is also essential for supervisors to coach employees and help them transfer training back to the work unit to use what they learn. Training efforts have the most lasting and beneficial effects when the supervisor follows up by engaging the employee in discussion about how the training has impacted job performance or workflow.

Balanced and relevant staff development programming can be provided on a broad and consistent basis when it is the major responsibility of a single individual. The primary role of a coordinator is to assist, guide, support, and encourage supervisors and employees in identifying and meeting their needs. Scheduling rooms, equipment, and speakers; announcing events; and arranging refreshments, evaluations, and follow-up might be intimidating to some, but are handled with ease and efficiency by an experienced coordinator. The coordinator can provide programming ideas and suggestions based on available resources and is also in a position to find appropriate sources when the topic is identified by others. Affordable resources are available from a wide variety of providers, including local librarians and teaching faculty, campus offices, library cooperatives, and professional associations.

UCFL is fortunate that staff development is recognized as a priority by the Director of Libraries. Without support from administrators and managers, program attendance would undoubtedly suffer. With the participation and enthusiasm of leaders, staff training can indeed increase skills, confidence, and morale for employees while enhancing user satisfaction and operational efficiency for the organization as a whole.

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APPENDIX 4.A: UCFL TRAINING AND EMPLOYEE DEVELOPMENT INITIATIVE

TEDI

Preliminary Needs Assessment

A task force has been formed to evaluate training needs and to prepare recommendations regarding possible programs and implementation. The task force is interested in input from all library staff and student assistants on what information would help you do your job better or improve your personal skills. This is only the first phase in developing a training program. You will have future opportunities for questions and additional input.

If you would prefer to talk to a task force member rather than fill out a questionnaire, contact any member: [names deleted].

Potential Training Areas

[NOTE TO READER: Be sure to change yes/no ratings to 5 = most important, 1= least important. See paragraph under METHODS for reasons.]

Important Content		Examples/Other Suggestions
Yes	No	
_____	New Employee Library Orientation	Library Policies & Procedures; Department Descriptions; Phone Use
_____	_____	_____
_____	Personal/Professional Development	Communication; Writing Skills; Meeting Management
_____	_____	_____
_____	Basic Computer/Software	MS Office; Web Browsers; Windows; E-mail
_____	_____	_____
_____	Public Services/Reference	Library Policies and General Information; Dealing with Difficult People; Phone Skills
_____	_____	_____

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Important Content

___ ___ Electronic Library Resources

___ ___ Managerial/Supervisory

___ ___ Health & Safety

___ ___ Technical or job-specific skills

Examples/Other Suggestions

EBSCOhost; WebLUIIS; INNOPAC

Skills for Supervising; Dealing with Different Personalities

Ergonomics; Emergency Procedures

Preservation of Materials; OCLC

Other subjects of interest:

Delivery Method

Prefer

Yes No In the library/On site

___ ___ Off site

___ ___ Self-instruction: video, audio cassette, Web, CD-ROM, e-mail

___ ___ Brown Bag

___ ___ Internal Instructors

___ ___ Outside Experts

___ ___ "Train the Trainer" (one person learns how to teach others)

Comments:

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Reasons and Incentives for Participating in Training

What training have you attended in the last twelve months? Please also indicate where, e.g. CFLC, Human Resources, etc.

What would encourage you to participate more in training activities? Examples: tuition waiver, flex time, content to help me do my job better, professional CEUs, required by supervisor, etc

Reasons and Incentives for Not Participating in Training

What currently discourages you from taking advantage of training opportunities:

Important

Yes No

☐ ☐ Lack of release time

☐ ☐ Too much work even with release time

☐ ☐ Not interested in subject

☐ ☐ Inconvenient location

☐ ☐ Supervisor not supportive

Other:

APPENDIX 4.B: STAFF TRAINING AND DEVELOPMENT TASK FORCE

1999 PROPOSED COURSES – DRAFT

Note: This list was compiled from suggestions collected during various needs assessment surveys and discussions and it was never ranked, prioritized into Curriculum Core & Electives, or adjusted to eliminate duplicates. There is also no attempt to explain acronyms or local specifics herein, as it is simply provided to give an idea of what could be included in general areas by a library. This list was never finalized, as administrators opted to go a different route than supporting a required core curriculum (see paragraph above under 'Staff Development Implementation Issues' for details).

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Managerial/Supervisory Courses

UCF Quality Commitment Series

UCF Quality Coaches Training Session

UCF Interviewer Certification

Skills for Supervising: (Supervisor's Tool Box Series)

Conflict Management

Counseling for Performance Problem Improvement

Mentoring/Coaching

Discipline and Documentation

Performance Appraisal

Creating a Motivational and Supportive Work Environment

Motivating

Goal Setting

Delegating/Assigning Work

Encouraging Innovation & Creativity

Managing Absenteeism

Managerial Skills: (SUS Department Heads Sessions, ARL Managerial Skills Workshop)

Budgeting

Decision Making

Efficiency

Establishing Goals, Objectives, and Priorities

Ethical Leadership/Management

Flexibility and Adaptability

Leadership Development

Managing Change

Meeting Management

Organization Skills

Problem Solving

Process Improvement & Streamlining

Professional Ethics

Project Management

Records Management

Self-assessment Techniques

Time Management

Personal/Professional Development

Communication Skills

Oral

Phone

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- Presentation
 - Written
- Writing Minutes and Policies & Procedures
- Listening Skills
 - Mediation Skills
 - Multicultural Communication
 - Assertiveness
- Negotiation Skills
 - Communicating in Difficult Situations
- How to Work in Groups/Team Building
 - Dealing with Different Personalities (Myers-Briggs)
 - Dealing with Difficult People or Situations Creative Thinking
 - Risk-Taking
- How to Build Self-Esteem (for self and others)
- Organizational Skills
 - Time Management/Planning
 - Goal Setting
 - Meeting Management
 - Facilitation Skills
 - Office Proficiency Series
- UCF Quality Commitment Series:
 - Customer Service Program
 - Products & Services That Meet Customer Needs
 - Set Measures & Standards for Performance
 - Process Improvement Tools

*Technical/Job-Related – Library Specific Training Organized By Department
Head/Supervisor:*

(Training for each department will vary at the supervisor's discretion)

These are examples only:

- Preservation of Materials
- Collection Development Techniques
- Accounts Payable/Receivable
- Purchasing Procedures
- Overview of each department, procedures, cross-training
- OCLC
- Technical Aspects of OPAC
- MARC Records
- INNOPAC

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Electronic Library Resources

Library Self-guided Audio Tour
WebLUIIS (OPAC) tutorial
Internet Workshop Series – Basic & Advanced
EBSCOhost
INNOPAC
Online tutorials (i.e. The Help Web)
Database-specific sessions
Vendor demos
CFLC workshops
Specialized Library Instruction Classes

Basic Computer/Software

Windows
MS Office instruction classes
 Excel Spreadsheets (Intro & Advanced)
 Microsoft Word (Intro & Advanced)
 PowerPoint (Intro & Advanced)
 Access Database (Intro & Advanced)
 Publisher
 FrontPage
Netscape/Web Browsers
HTML Editor/Creating Home Pages
Desktop Publishing
GroupWise Instruction: E-mail, Calendaring, Organizing Your Work, E-mail Etiquette

Library and University Orientation – New or Review

Library – General Information:
 Library Policies & Procedures
 Department Descriptions
 How Departments Affect the Total Picture – Students
 Library as Part of the University
 Branch Campus Tours/Meetings Main Campus Tour
 Phone Use
Rights and Responsibilities of Employees
 Benefits Packages
 Employee Incentives
 Employee Assistance
 Mentor Program
 Job-Sharing

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Policy/Procedure Awareness and Training
Understanding the Library's Long-Range Plans
University Policies/Procedures
Purchasing Policies/Procedures
Human Resources Policies/Procedures
Discipline and Documentation
Travel Policies/Procedures
Position Descriptors: Faculty
Position Descriptors: USPS

Health and Safety

Environmental Issues:

Sick Building
Safety of Water Supply
Workplace Injury

Security & Emergency Procedures

Workplace Violence
Safety Measures on Campus
Evacuating Building/Fire Drills
First Aid Responses – employees/patrons
CPR Training

Ergonomics – Comfortable Work Surroundings (computers, desks, chairs, lighting, etc.)

Stress Management/Desk Yoga

Counseling – Grief/Personal Problems

Sensitivity Training

Work Attitude – Humor
Handling Discrimination and Diversity
Handling Intimidation and Harassment
Cultural Awareness
AIDS Awareness
Alcohol/Drug Awareness
Dealing with Difficult People/Getting Along With People
Disability
Equal Opportunity & Affirmative Action

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APPENDIX 4.C: STAFF DEVELOPMENT COORDINATOR

Original Position Description Draft Developed 4/11/2000

DUTIES

- A. Establishes Staff Development goals and policies in consultation with the Director of Libraries.
- B. Develops and provides for evaluation of the curricula and programs.
- C. Schedules and facilitates training programs.
- D. Develops and maintains access to a collection of staff development materials.
- E. Maintains training records, statistics, and files.
- F. Promotes and publicizes staff development and training.
- G. Serve as liaison with training organizations, the University's Human Resources Department, Library Department Heads, supervisors, and staff.

PERFORMANCE OBJECTIVES

- H. Establishes and monitors uniform procedures for access to developmental opportunities.
- I. Encourages managers and employees to participate in training opportunities.
- J. Oversees new employee orientation.
- K. Conducts needs assessments and program evaluations.
- L. Chairs meetings with the Staff Development Advisors.
- M. Supervises clerical staff and student assistants in the unit.
- N. Maintains an awareness of developments in the field and plans for growth and improvement in the service.
- O. Provides budget, attendance and other program information to the Library Director.

Other roles added later:

Ex officio on faculty mentoring committee and faculty promotion committee.

Coordinator of internship activities

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APPENDIX 4.D: UCFL – NEW LIBRARIAN ORIENTATION CHECKLIST

Prepared for: _____ **Date of Hire:** _____

Mentor: _____

Before Arrival

Computer Accounts Requested
Workstation Stocked
Need new telephone or computer?
Keys

Assigned To/Date Completed

Orientation Information Packet

Library Mission, Values, Vision
Library & Department Organization Chart
Maps: Library & Parking
"Who Does What?" List (staff directory)
Emergency Contact Form to Personnel Librarian
Time Sheet, Instructions & Pay Schedule
Conflict of Interest Form
Telephone Directory, Tips & Helpful Hints
Employee Orientation Checklist
Confidentiality

Assigned To/Date Completed

Home Department Information

Department Info, Meetings, Resources, etc.
Department Policies & Procedures
Letters of Assignment & Accomplishment
Promotions & Evaluations
Evacuation/Fire Map
Work Schedule
Time Sheets
Departmental Leave Procedures
Supply Ordering & Location
Business Cards & Notepads Ordered
Telephone Logs & Dialing Instructions
Staff Lounge Combination
Technical Support
Email, Knightline (listserv), Pegasus, Directories

Assigned To/Date Completed

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Assigned To/Date Completed

Assigned To/Date Completed



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Other

UCF HR Orientation

Tour Campus

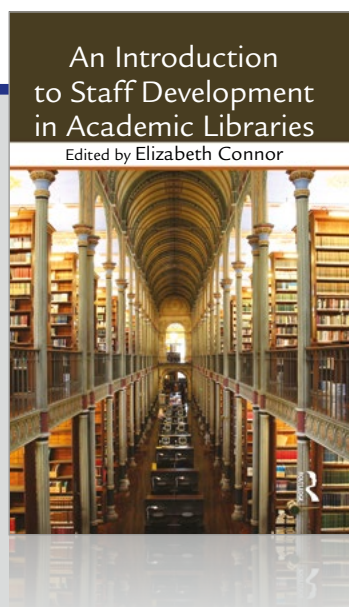
UFF Rep – Collective Bargaining

UCF Annual Faculty Orientation

Assigned To/Date Completed



DEVELOPING LIBRARY PROFESSIONALS IN A MULTI-DISCIPLINARY SUPPORT ENVIRONMENT AT THE UNIVERSITY OF CUMBRIA



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Academic Libraries*

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DEVELOPING LIBRARY PROFESSIONALS

IN A MULTI-DISCIPLINARY SUPPORT ENVIRONMENT AT THE UNIVERSITY OF CUMBRIA

Margaret Weaver, Paul Holland, and Lisa Toner

Excerpted from An Introduction To Staff Development In Academic Libraries

INTRODUCTION

Academic library services are diversifying to meet the needs of a new generation of learners, who expect a “one-stop” approach to service delivery and excellent customer service. Notably this is achieved by structural changes, resulting in a convergence of service elements, consisting of library, Information Technology (IT), and associated services (often media, elements of learning support, and, latterly, learning technology). In common with the US and Australia, the United Kingdom (UK) has adopted convergence on a large scale to meet these imperatives. This places new demands on staff in support roles. St. Martin’s College (now known at the University of Cumbria) Learning and Information Services (LIS) is an example of how a newly created, “converged” academic library in the UK approached the training of its people following a restructure. A training needs analysis was conducted to assess the learning requirements of staff from variant professional backgrounds.

This chapter outlines the rationale and construction of the training needs analysis, its links with appraisal, and how the results led to the training initiative. The training plan that emerged is specified, including how it was designed to help staff acquire the skills required. Embracing new job roles and understanding the contribution of colleagues from different professions and sites is part of the qualitative evaluation—including the extent to which the training initiative was successful and its perceived value to staff. A literature search on continuing professional development during times of change is presented from a multi-professional perspective. The conclusions are the result of a “whole team” approach to staff development that includes perspectives from participants, trainers, and the LIS Staff Development Group.

SETTING

This chapter concentrates on the UK perspective in order to articulate the approaches that are being taken to prepare staff for work in this new learning environment. A case study at St. Martin’s College is presented as evidence of how one service transformed itself from a traditional and reactive library service into a proactive and user-centered provider, following a restructure. This development has resulted in a new model of delivery, embracing service integration and enlarged roles for staff. It is first helpful to consider the external factors in the UK brought about this change, before studying the literature on converged library services including relevant staff development contexts that these changes influence. It is a complex picture.

DEVELOPING LIBRARY PROFESSIONALS

IN A MULTI-DISCIPLINARY SUPPORT ENVIRONMENT AT THE UNIVERSITY OF CUMBRIA

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Excerpted from An Introduction To Staff Development In Academic Libraries

EXTERNAL DRIVERS RELEVANT TO UK HIGHER EDUCATION

In common with the rest of the world, the UK higher education system is increasingly predicated on the belief that educational opportunity should be inclusive and extended to all. This is reflected in government targets for young people and underpins national widening participation objectives. Students from a variety of backgrounds are now encouraged to see further/higher education as an achievable goal and funding regimes have been introduced to assist disadvantaged groups; opinion is divided on whether the new system of tuition fees, first proposed by Lord Dearing in 1997, inhibits rather than enables take-up. These national trends have contributed to a fundamental rethink about how students from non-traditional backgrounds can be fully supported, with concomitant implications for how universities organize themselves, including their support services, and even a reconsideration of what constitutes a university in the twenty-first century. Student retention and progression routes are therefore a central tenet of university strategies. The 14–19 years policy area and the Every Child Matters strategy are also impacting on the mission and perspectives of institutions like St. Martin's, which is, in the main, a vocational education provider. This expansion of higher education is set against a shrinking unit of resource in real terms, forcing higher education institutions (HEIs) to be more cost-effective and business focused.

The changing nature of students and their lifestyles is also having a profound effect on their expectations of a quality learning experience. Many students combine work with study whether on a part-time or full-time basis and they make increased demand on a range of university services across extended hours of the day and year. They lead busy lives and expect immediate responses and good customer service; they are not interested in service/academic demarcation, but in timely and effective support—often requiring it remotely. It is thought that bringing relevant functions together within a single management structure is of benefit to learners and tutors.

Work-based learning is becoming the norm in many higher education institutions like St. Martin's. The recent Leitch Review of Skills recommended that further and higher education providers more fully embrace the skills required for employability and competitiveness on a global scale; this means increasing skills attainment at all levels by 2020. New qualifications such as Foundation Degrees are enabling students to study and progress in a range of vocational subjects. Institutional learning and teaching strategies are reflecting these changes with more emphasis on students as active learners able to interact in the real world, employable, confident, and Information and Communication Technology (ICT) literate. The

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ubiquity of technology is simultaneously shaping university missions, curricula, and service delivery. The term “digital native” is used to describe people who utilize IT in a connected and networked environment that is pervasive in their lives, shaping a new culture of studentship that requires a modern and IT-enabled experience. Increasingly, social and informal learning environments use virtual learning and advanced communication tools to become integral parts of the student experience. In tandem the development of digital libraries, hybrid libraries, and the increased emphasis on information management and records management have contributed to discussions about economies of scale and how best to exploit web-based information and learning technologies. Another kind of convergence is also happening between space and learning, and learning and support. The redesign of the academic library as an “Information Commons” has affected how learning spaces are envisioned and connected to learning and teaching, with significant implications for staff roles.

This complex picture demonstrates that learners are expecting to be more in control of their learning and to be able to make informed choices before, during, and after their course. Realistically this places additional demands on learners, academics, and on supporters of learning, leading to a debate on the very nature of the student experience and what constitutes “graduateness” and the educational purpose of a university. Learning Support has therefore become a greater institutional priority because of a recognition that fundamentally students can only be successful if they are supported via a holistic set of approaches and services.

The join up of higher education in the UK with the entire educational system (from cradle to grave) is evident in government policies and statutes. It is mirrored by bodies such as the Joint Information Systems Committee (JISC), that now serves a unified sector of further and higher education institutions, including academic libraries. JISC is in the forefront of ICT developments in the UK and continues to assist institutions to develop their global information strategies. Therefore these trends have understandably impacted greatly on institutional missions, strategies, and structures. Bringing functions and services together into a unified managerial framework (convergence) has been seen as one way to address these needs.

LITERATURE REVIEW

The history of and rationale for convergence is well documented in the literature on academic libraries in the UK. Indeed the UK has embraced service integration on a fairly large scale, unlike the rest of Europe. The reasons for this are complex and

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largely unevaluated. The Fielden and Follett reports of the 1990s first recommended that academic library personnel could and should influence learning support and that they required appropriate training and development to do so. Indeed, most of the studies on converged services highlight the requirement for staff development and training as does Field's seminal work on convergence in the UK. This is true whatever model of convergence is adopted—whether managerial or operational. Fisher also discusses the various models of convergence and the reasons for adoption and points to the creation of multidisciplinary teams being a direct result of service realignments.

Further, the notion of “new professional practice” is now a reality as first envisioned by Fowell and Levy in their article on networked learner support, emerged because of pervasive web-based digital information, and the new pedagogies of e-learning and blended learning. Brophy, writing in 2000, also confirmed the rise of the networked learner and the blurring of roles that would ensue both between information workers and academics, and among supporters of learning. Understandably, new staff development contexts and scenarios develop as a result of these advances.

STAFF DEVELOPMENT CONTEXTS

Hanson's recent book on the “convergence experience” of academic libraries offers a real insight to the cultural changes that convergence brings about. Using a case study approach, the collective experiences of contributors is presented from the perspective of the Head of Service. The importance of staff development and training as a requirement during times of change is a common theme throughout; it is thought to be an effective way to help bring new teams together to potentially narrow any cultural divide. Delivery of staff development, however, must be set alongside a wider set of strategies such as those concerned with communication, recognition, and support for critical thinking.

The IMPEL Project (arising from the publication of the Follett Report) first suggested that joint staff development and training could promote a shared understanding of service objectives and multi-professional perspectives drawing on the values and behaviors of staff. The IMPEL2 project continued this work, particularly examining the impact of electronic libraries on role perception and educational partnerships. The term “multidisciplinary team” is emerging to describe these multifaceted roles, and while prevalent in health disciplines for some time it has only recently been applied to academic library teams and literature on converged services. The Society of College, National and University Libraries (SCONUL) Taskforce on e-Learning <<http://www.sconul.ac.uk/groups/e-learning/papers/finalreport.pdf>> recommends more research

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into the development needs of staff who assist learners and tutors with flexible learning approaches. Their report highlights the significance of working with other groups of staff and to the existence of possible professional boundary issues. This suggests that staff require help with role development in these new contexts.

Converged teams bring strategic advantages to an institution, including an expansion of the skills base, and the capacity to support students more effectively and seamlessly. Concerns about deskilling or stifling of identity are a common theme in studies about training in converged services. A training needs analysis is not a new idea but is a practical tool that can be used to plan and implement staff development following a convergence. Further, studies show that implementation of converged teams is better achieved if there is a reassurance that the new identities embedded in new roles will not undermine staff's original professional background and values. According to Haines, "there is a need to help staff recognize different professional cultures and to find ways to identify common values."

What emerges from these and other studies is that irrespective of the institution, the importance of managing change and using the opportunity of the change to put into place a comprehensive and holistic training plan must not be overlooked.

OBJECTIVE

St. Martin's College LIS is an example of a converged department that met the training needs of staff following the merger of the formerly separate Library, IT User Support, Media, and Learning Technology services. The deciding factors that brought about this particular model of convergence were related to the aims expressed in the Corporate Plan 2004–9, which stated the College's intention to realign its support services to ensure the successful delivery of the student experience in Cumbria, Lancashire, and from its campus in London. The academic strategy was predicated on the assumption that students flourish only if a wide range of pedagogic and blended learning approaches are integrated into a vibrant academic portfolio alongside excellent support. In fact, the creation of a new learning environment was the goal, with a well-prepared workforce functioning within optimum structures.

Taking note of the external and internal factors, the new LIS department was established in January 2006 after a one-year institutional review. In parallel, flexible and distributed learning approaches were being advanced while a new regional university was being created. St. Martin's became the University of Cumbria in August 2007, based on the Harris Report recommendations.

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An LIS Implementation Group was set up in April 2006 to oversee the implementation of the new structure. Staff representatives from all campuses and teams were able to meet and agree how the changes would be supported. Staff development and training was identified as essential for all staff. It was obvious that a systematic response was required to meet the revised emphasis of LIS roles and new job descriptions. The modifications to roles centered on:

- A higher profile of ICT and learning technologies within the job specification;
- Learning and teaching elements specified in all job descriptions;
- Integrated service delivery (front-line roles working across the disciplines for better customer service) on all campuses, harmonizing the current varying managerial structures;
- Academic liaison teams to liaise with academic staff about all LIS activities (not just “library” or “IT”);
- The use of systems for increased accountability and service improvement, for example, help desk software was introduced for all teams;
- Harmonization of service desk functions and opening hours across the three main campuses;
- Service availability mapping across core and non-core hours.

It is notable that each of the three LIS campus teams was at a different stage of development as each had been set up at different times. Consequently, each team was inconsistent about the level of convergence. After the restructuring, there was a single service and management model on all campuses.

METHODS

A training needs analysis (TNA) was carried out to assess the learning requirements of staff from variant professional backgrounds, who had been brought together into the new LIS department. This section describes how the TNA was designed and embedded within annual appraisal processes and how the outcomes fed into the training plan. Focus groups took place to explore the perceptions of staff who had taken part in the TNA and the staff development sessions. By connecting the strategic purpose of the TNA and the participative benefits of collaborative training design and delivery, the intention was to provide optimal conditions for staff engagement.

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TNA IN CONTEXT

The structure was designed to enable LIS to provide an integrated library, media, and IT support service across multiple campuses, which required staff to broaden their skills in preparation for a wider range of knowledge-intensive activities and responsibilities. The objective of the TNA was to identify any gaps between the current abilities of each individual and future job requirements in the new structure. The proposed structure would require a cultural change, a more integrated approach, broadened roles, and a greater understanding of the services provided by the new LIS. Some staff expressed concern about the complexities of the restructuring process, which coincided with a college-wide role analysis and the harmonization of conditions. There was uncertainty about the impact the changes would have on the day-to-day work of different staff roles. Some staff expressed anxiety about some new areas of responsibility. The analysis of training needs and subsequent training sessions were intended to prepare people for these role-related changes.

Since the LIS team comprised over 100 people working across three campuses, the simplest method of gathering the initial data was to create and issue a TNA form. LIS staff at each campus were asked to incorporate their new staff training programs into the TNA form. Inevitably, in a multi-site organization there were some differences in LIS practice at each campus, often due to a need to meet localized requirements. The form was an opportunity to capture all of these, together with the standardized activities, and to present a comprehensive choice to all LIS staff.

The form listed the full range of skills across all LIS job functions, including library services, audio-visual and media equipment, learning technologies, and basic IT support skills as well as more generic corporate training modules including courses that are mandatory for all college employees. The form was designed to be self-completed by each person. The form (see Appendix 6.A) was e-mailed to all members of staff within LIS. The instructions stated that the form would be discussed during the annual appraisal meeting. Skills areas and existing training courses were categorized to make the form easier to use and to identify mandatory sessions; no attempt was made to steer people toward development opportunities that were solely within the confines of their current or proposed areas of responsibility. A section on the form provided space for recording completed training, together with dates. A separate form was created for line managers to collate the data from the individual TNA forms into one "team form."

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The opportunity to self-select areas for personal development was an important aspect of the process. This focus on the learner rather than just the departmental training needs afforded people the freedom to identify areas that needed refresher training, areas that were pertinent to their roles, or topics of personal interest. A learner-focus was recognized by Sloman as something that was necessary in a learning organization, with a subsequent shift in emphasis toward the individual or team taking more responsibility for their own learning.

The completed form was a key part in the forthcoming appraisal meetings between an individual and his or her line manager. This link with the college-wide appraisal process resulted in two benefits:

- **A higher return rate:** traditionally, the return rate for self-completed forms is low and reviewing the forms during the appraisal meeting would counter this.
- **Better balance of development needs:** it enabled a balance to be struck between the areas of development that each person had identified for themselves and additional development areas based on the “bigger picture” of potential future organizational needs that could be suggested by their line manager.

This second element also addressed some of the potential disadvantages that might exist by relying solely on the needs identified from a staff survey. By identifying training needs during the appraisal process, the outcome is a set of personal development plans that meet both individual as well as organizational needs.

One weakness of the form has been identified. Although each campus contributed to its creation, the form does not define the training content, as this is the responsibility of each trainer.

THE ROLE OF THE STAFF DEVELOPMENT GROUP

The Staff Development Group (SDG) is comprised of members from all functions and sites within LIS. SDG has worked to establish a multidisciplinary approach to training and development opportunities, mainly by funding a variety of external courses and conferences but also by organizing in-service training events. The mission of this group includes, “to plan and co-ordinate whole service training events in line with LIS strategic plan.” This has partly been achieved by the introduction of a series of half-hour time slots during which different types of training can be facilitated.

Knight and Yorke acknowledge the importance of experiential learning, which can be achieved by demonstrating and learning in different situations. This demonstration

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of skillful practice in context can enable staff to change and adapt while at the same time promoting the belief that all staff can continue to learn and develop throughout their lives. With that understanding comes self-efficacy and the belief that each individual can make a difference. LIS aims to constantly develop a team of capable staff by stretching, challenging, and stimulating self-reflection within a supportive framework. According to Stephenson:

Capable people not only know about their specialisms, they also have the confidence to apply their knowledge and skills within varied and changing situations and to continue to develop their specialist knowledge and skills.

As such, LIS training is viewed as a core aspect of work not a “bolt on,” or extra. It is a process that all staff engage with, in order to develop personal effectiveness and, as a natural consequence, the effectiveness of the service as a whole. The TNA was seen as an extension of this work. Completed TNA forms were sent to the SDG once the appraisal process had finished. The data was entered into SPSS, a statistical analysis package, which enabled lists to be generated showing which staff had requested which training courses. Once this data was available, the SDG began to plan the course program.

A principal aim of the program was to include as many staff as possible in its delivery, partly to avoid overburdening individuals but also to stimulate ownership from staff in the process of training within their area of expertise. Initially it was hoped that some “train the trainer” courses would be held for those involved in delivery but this was not arranged in time. Instead those who felt the need for support were encouraged to attend external “presentation style” courses. This was of benefit particularly to those at the LIS assistant level who had little experience with the delivery of training. Training from the “bottom-up” has been an inclusive process which has united staff, made the program seem less onerous, and enabled real conversations to take place about aspects of the work changes in a non-threatening way.

The format of the training was left to the individual teaching the session. On the whole, most sessions were half an hour and fitted into existing weekly half-hour training slots. Some courses were delivered over a half or a full day and some were delivered using Blackboard, the college’s online virtual learning environment or *Inform*s an interactive online tutorial. The mix of delivery methods has proved to be one of the strengths of the program as it has added variety and serendipity to a fairly intensive program. Evaluation forms from the events were distributed via the trainers.

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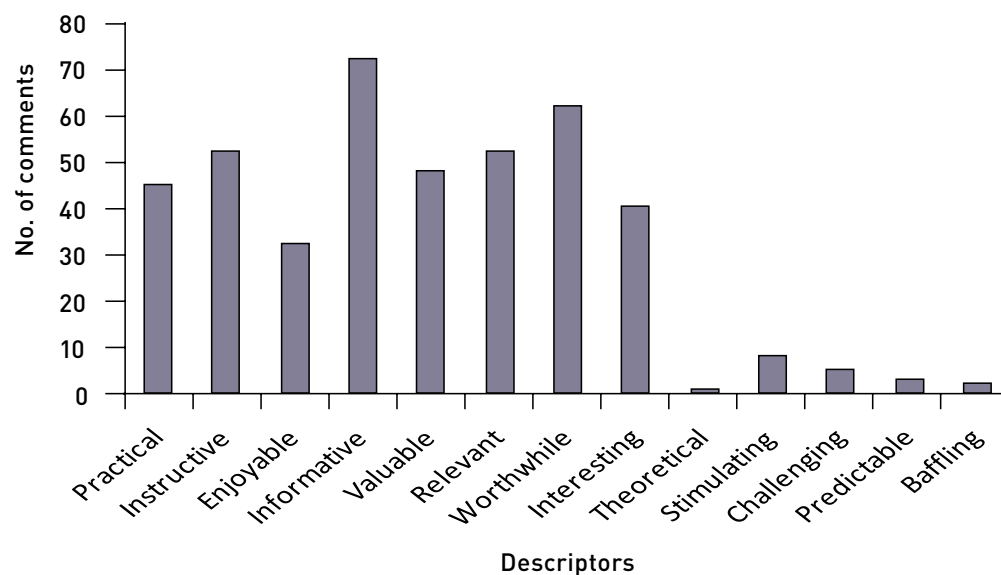


Figure 5.1 • Ascribed value of courses

EVALUATION

The training plan and program were designed to teach new skills needed as a result of the restructure. Embracing new job roles and understanding the contribution of colleagues from different professions and sites are complex processes. LIS was keen to evaluate both the TNA and the extent to which the training initiative was of value to staff during times of change. Two mechanisms were introduced to collect data from staff: post-training evaluation forms and focus groups.

POST-TRAINING EVALUATION FORMS

The evaluation form was adapted from one designed by the Centre for Development of Learning and Teaching at St. Martin's College. The form has evolved over several years and was shaped by participant research (see Appendix 6.B). The form aims to elicit feedback from a variety of professional disciplines within the college; its style and language have been carefully selected to facilitate this.

Figure 5.1 shows the relevance of the sessions as perceived by staff taking part in the program. Staff were asked to circle words from a predetermined list to reflect the value of the course to the individuals. Most staff replied that the training would help them to advise students more effectively in the future and feel confident about covering for other teams during times of reduced staffing levels. No one circled

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terms such as threatening, tedious, vague, irrelevant, uninteresting, pointless, repetitive, nothing new, waste of time, or dull.

FOCUS GROUPS

To evaluate the TNA process, six focus groups (involving 30 staff in total) were conducted following the training sessions. Each focus group was made up of mixed staff teams and professional backgrounds—two at each campus—to allow for homogeneity but also to capture a variety of opinions as suggested by Krueger. It was important to gauge staff perceptions about the TNA to find out its impact, and also to capture staff views on its future design and use. Audio taping was rejected as it was felt to be a sensitive topic that could affect the level of staff engagement. All sessions were documented by the Service Administrator.

An open questioning technique was used to explore themes. As advocated by Morgan and Saxton, a mix of covert and overt prompts was used. The discussion areas centered on the TNA and its use in multi-professional contexts. Verbal reinforcement was avoided by the facilitator to elicit honest opinions and draw out responses (see Appendix 6.C). The discourse was analyzed using categorization techniques. It was valuable to have the same person record the sessions as it was felt that this provided objectivity. The limitations of focus groups in qualitative research are acknowledged, nonetheless collective phenomena emerged as follows.

RESULTS

Staff views and opinions were analyzed using data from the two instruments. Overall, most staff were positive about using the TNA as a way to identify their training needs. Several cross-cutting themes emerged that prompted further questions:

- Purpose and design of the TNA—did it fulfill its objectives?
- Links with the appraisal process—was it helpful to staff?
- Delivery of training—to what extent did participants and trainers find it of value?
- Professional background—was it a relevant factor?
- Did team dynamics play any part?
- Was training and evaluation of this nature appropriate during times of change?

Each of these is explored below.

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PURPOSE OF THE TRAINING NEEDS ANALYSIS

Several people queried the exact purpose of the TNA and felt it needed more clarification during its introduction. The specificity of training was deemed a good thing as the sessions related to St. Martin's jobs rather than being generic. Most categories of training were relevant, although the TNA form did not cover specialized ICT courses.

Staff liked being able to select their own training sessions from the TNA form and felt that more engagement was likely than if they had been told to attend. Self-selection enabled them to tailor training to their need, whether it was job training or personal interest. The TNA form provided a structure to the training opportunities as well as providing an impetus. The deadlines for training completion were also helpful in this respect.

One campus expressed a level of uncertainty about the relationship between the TNA and the LIS restructure process. Since this campus had provided half-hour training slots for some time, there was no distinction between the training provided via the TNA; routine training was seen as addressing the identified training needs at the time. As a result, staff at that campus found it difficult to separate out the TNA from other training sessions and it was seen as only one tool in a range of training opportunities. The reason for this may be connected to the extent that training is embedded into normal working practice.

DESIGN OF THE TNA

The TNA form was described by staff as a generic but comprehensive list that provided a good breadth of choice. Staff appreciated being involved in construction of the TNA categories, although the use of technical jargon caused some people to be confused. It was felt, however, that the form should have included more detailed descriptions, as the "Categories" might act as deterrents if staff were unsure what they meant. Some felt that there was no one to give guidance when selecting from a wide choice of training sessions, and one person felt that ranking the usefulness of the different training sessions for each job role may have been helpful in determining the level of training. Describing the selection process, staff chose courses that looked interesting or filled a gap in their own knowledge. They asked themselves, "Do I know how to do that?" when filling out the form. Respondents found it helpful in identifying college requirements for the job. On the other hand, one person commented that the wide range of training allowed her to "spread her wings" and not be confined to the immediate job role and that this was motivating.

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LINKS WITH THE APPRAISAL PROCESS

Staff said that the TNA was a positive enhancement to the appraisal process and reflected the evolution of LIS jobs especially with relevance to IT. Most staff discussed their TNA forms with their line managers at either an appraisal or probation meeting, and this was described as useful. Discussion at a more formal meeting helped people to focus on their training requirements. Since the appraisal form refers explicitly to training needs, it was the logical time to discuss it. Essential training was the main focus of appraisal discussions but because staff were encouraged to discuss the entire TNA form, they said it enabled them to think about how training is carried out and, importantly, to document systems used within LIS. Day-to-day requirements as well as the elements in new job descriptions were considered. Relevance to the job was high on the list of reasons for choosing a particular training course, borne out by **Figure 5.1** (see p. 65).

Staff reported that one of the main benefits of linking training with appraisal was having their manager's knowledge of the "bigger picture" when discussing selected training sessions. Talking about training during the appraisal process led to choosing more sessions than might have been done alone. A minority of staff in the focus groups commented that their discussion at appraisal had not made any significant difference to the selection made. On the whole, staff chose sessions that were not directly related to their own job but that would fill gaps in their knowledge. It was seen as particularly useful for the technical support staff to gain background knowledge in library routines, although this view was not universal.

DELIVERY OF TRAINING

The importance of the trainer in contextualizing the content was mentioned. Having a wider range of staff (than previously) involved in delivery of the training was seen as a benefit. The groups did not think that making staff development "compulsory" was attractive but accepted that certain courses needed to be mandatory. Translating the training into practice was seen as the biggest challenge for staff. The importance of setting aside specific time for training was noted. There was a strong preference for delivering the training during a weekly half-hour time slot. Staff appreciated the small group, informal settings, and the opportunity to mix with others. Overall, staff were fully satisfied with the training that they received.

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TRAINERS' PERSPECTIVES

Without exception, the groups questioned how trainers had been chosen, and wondered if this had been done by job title. Some trainers were unsure about whether they were competent to do the relevant training and requested more preparation and discussion about who carried out the training requested. Delivering training sessions was perceived as beneficial to staff's own jobs but more support for trainers would have been appreciated. It was felt that being a trainer offered the chance to "learn how to explain things clearly." It was suggested that trainers should have input about category descriptions, from overview to in-depth sessions on specific subject matter. These results show that some trainers were unused to taking on this role and needed more help, which LIS is addressing.

PROFESSIONAL BACKGROUND

No one mentioned professional background as being an important factor per se, in either choice of course or interactions during training. Focus group participants did find it useful that training sessions were available to all teams and across all sites. There was a feeling in one focus group, however, that staff background would tend to influence the choice of training course taken since gaps in knowledge about the enlarged service would occur both between and across the disciplines. The TNA process highlighted that multi-skilling is necessary in an integrated service. Although some training areas are now blurred and not specifically "Library/IT/Media," the range of training presented on the TNA supported a broader understanding of LIS roles. Participants also thought that the TNA helped avoid staff "stereotyping" and was therefore a supportive tool. The involvement of new staff in the TNA during induction as well as probation was suggested as a future enhancement.

TEAM DYNAMICS

The results here varied by campus more than any other category and demonstrated that LIS teams were at different stages of development. At the campus where integrated teams had been established in 1997, working practices did not change much as a result of the restructure, and people that had worked together for some time did not emerge from the process with any different views about the teams or the team responsibilities. This was similar to the situation at the second campus; the TNA did not appear to affect staff views of their roles in the new integrated service as enhanced relationships were underway. Staff were already covering each other's jobs on the front-line service desk and a more holistic team was being developed anyway.

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Staff expressed the view that they got more job satisfaction from knowing each others' roles in an integrated service and that ultimately this benefited the students. They felt that the integrated service was beneficial to working relationships. The campus that had experienced the most change as a result of the recent introduction of multidisciplinary teams made particular mention of the training's effect on team roles. Staff commented that training allowed people to understand other perspectives, put faces to names, and identify a team's skills gaps. Important points included avoiding variable knowledge in a team, taking a targeted training approach, and limiting variances in staff attending training sessions. The TNA allowed this level of analysis for the first time. Size of teams was not mentioned as a factor but the need to ensure that more than one person has a particular skill was highlighted.

AS A CHANGE TOOL?

As noted previously, not all staff connected the TNA with a change in culture and practice that the restructure represented. This disconnect was related to different developmental stages of campuses and the perspectives of individuals. It is possible that the way the TNA purpose had been communicated was also a factor. The TNA helped staff become more aware of requirements of other areas within LIS. One person mentioned that it challenged assumptions about staff roles. A line manager who also was a trainer said the opportunity to provide training helped her develop a service-wide role rather than campus-based role, and let others experience this change in her role.

Looking back, staff said that they only had a partial picture of their jobs at the time of completing the TNA; they reflected that they would probably choose additional training if they were completing it now. The role of the line manager was particularly mentioned as a key agent in the process of staff engagement with the TNA and its value in helping staff to see a wider picture. As a training and development tool the line manager discussions were found to increase choice of sessions chosen and to be an effective method of following up training outcomes. However, one group mentioned how feedback from other staff members had also influenced choices of training.

Staff were pleased that technical support members of LIS had chosen to participate in the library training as it was felt that this brought a fresh view and better understanding, even though the extent of this was not even across the campuses. There was agreement that in an integrated service it is good for staff to know as much as possible about other staff roles, and this was seen as important when

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helping colleagues and customers. To varying degrees, the TNA was viewed as being one of many things that were happening at the time of the restructure, and was difficult to separate out from other events. One member of the staff commented that she had “conquered her personal fear of IT” as a result of completing the training. Staff said that they now felt more comfortable in their new roles.

VALUE OF TRAINING

Did the TNA lead to a better staff training experience? The TNA certainly prompted staff to think about areas of training needed, including areas indirectly relevant to their work, and provided the opportunity for staff to do things that they would otherwise not have done. Staff were satisfied with the results. The opportunity for refresher training was important. This was particularly true for areas with recently updated procedures, or areas of work that changed frequently. An example of this was the Help Desk call logging software. It was felt that the TNA carried out the previous year offered good baseline training so that, in the future, there could be fewer but more focused sessions. In other words, the TNA itself was appreciated and staff felt that they would like to use it again with certain enhancements.

CONCLUSION

Based on this case study, it is concluded that the use of a TNA and accompanying training program, organized centrally and run locally, has been a helpful tool in supporting staff through periods of change in multi-professional contexts. The multi-campus nature of St. Martin's has added complexity but also yielded rich information about how teams interact over time and within a common service framework. The quality of team relationships before the program took place was as significant as staff readiness for change and comfort with new roles and colleagues. Personal qualities were deemed to be more important to role definition than professional background or technical skills, which confirms previous research.

Several learning points have emerged from this experience. The TNA is an iterative process as is skills acquisition; staff need time to adapt and to understand their response to the change process. Identifying potential trainers and their roles in the new department has led to the emergence of staff expertise and increased confidence. Line managers and trainers need particular support during times of change in order to fulfill their responsibilities as supporters of staff and of institutional change. They are influencers and also part of the change itself. The

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reflective nature of conversations with line managers is an important aspect of personal growth and development (for both parties) and helps staff to come to terms with changes. Individual responses are valuable indicators of well-being and inextricably linked to personal preferences and expectations of the workplace.

Evaluating the TNA thoroughly and using a participative, flexible design have been parts of the change process itself, leading to a broader engagement with training than would have occurred if this study had not taken place. Significantly, this means that library staff broadly agree on the value of the tool going forward, have ideas for its enhancement, and support its use in practice.

Converged library services bring entirely different staff development needs than traditional library services do. These needs go beyond a simplistic set of training objectives. It is important to engage staff in the design and delivery of training sessions and to evaluate their impact through a “whole team” approach. In this respect, the TNA tool and LIS SDG have important roles to play in developing the multidisciplinary workforce. The evaluation of the TNA process was found to be a helpful strategy in examining the extent to which LIS staff felt empowered in their new roles. The final word rests with a member of LIS staff who wisely commented, “I have more belief in one service now, not necessarily due to the Training Needs Audit, but this is all part of the change process.”

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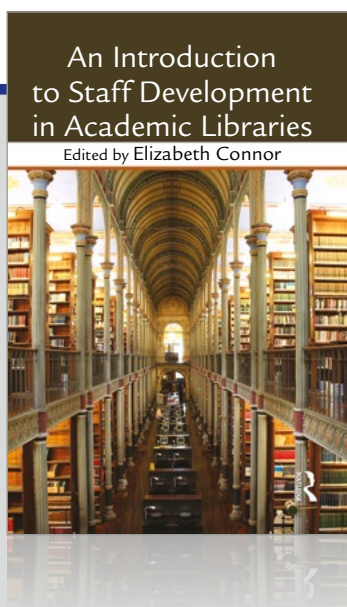
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INTRODUCTION

Any librarian or library paraprofessional is extremely aware of the rapidly changing environment found in today's libraries. Michael Gorman summarizes the state of libraries today saying that "we are deep into an era in which digitized information and electronic resources dominate our working life and professional discussions." New technology and advances in service as well as online environments that change daily make it necessary for libraries to continually train staff. As Westbrook points out, "in a field whose unofficial motto is 'the only constant is change,' serious efforts at ongoing library staff development constitute fundamental concern for all levels of management."

It has become important for staff to have access to just-in-time learning or to be able to review information on new processes or policies at a moment's notice. This environment is coupled with the requirements of library staffing, which mean that employees work days, evenings, weekends, and in some academic libraries, into the night. As much as library staff want to turn to the person next to them to ask a question, there are many times when staff work by themselves or the authority on a specific technology or topic has long since gone home. Library workers are therefore faced with learning new technology on the job and in situations where there are few human experts present to answer questions.

Penn State Great Valley Library answered this challenge by creating a course management system site for library staff. The site was developed using ANGEL software and permits staff to access resources for training, important procedures, memoranda, staff schedules, etc. Individuals with a Penn State Access Account can access the site twenty-four hours per day, seven days per week from any Internet-accessible location.

Course management systems (CMS) such as Blackboard and ANGEL are frequently used to offer library instruction to students and faculty but these systems can offer more than course-related instruction activities. This case study explains how CMS can be used for library staff development, communication, and training.

Using the *Great Valley Library Staff User Group* site created by the Penn State Great Valley School of Graduate Professional Studies Library staff as an example, this chapter will briefly explain course management systems, discuss the rationale for using a CMS site for Library staff development, and explain how these systems can be created, implemented, and used to improve access to important processes,

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procedures, and documentation. Advantages and challenges of using this technology will be covered. The chapter will end with a discussion of future trends that may influence the development of CMS sites.

SETTING

Penn State Great Valley School of Graduate Professional Studies is a graduate-only campus of Pennsylvania State University, located near Philadelphia. Part of Penn State University Libraries, the library is open sixty-five hours per week including evenings and weekends, and employs a staff of twelve (full- and part-time professional and paraprofessionals). Although the staff are fairly savvy about technology, they still face continual changes in technology, policies and procedures, as well as situations in which a staff member performs a function that is not part of his or her normal routine, such as opening or closing the library.

In both staff meetings and individual conversations with the Head Librarian, staff had expressed the need for a more flexible and accessible way to consult training materials and copies of policies and procedures. Although the Circulation Desk included a number of notebooks filled with information, a bulletin board for important items, and “red memos” for notices of high importance, the staff were seeking better ways to locate and update materials as needed. The ability to access just-in-time training or immediately get information on a policy or a procedure when needed during the course of a patron interaction or performance of a task were high priorities in staff conversations. During a general staff meeting discussion, ANGEL was suggested as a possible way to increase communication. This idea was made easier by the fact that the campus Instructional Designer reports to the Library and she was well-versed in the ANGEL system because of her work with faculty and students. She understood the various tools that were contained in the CMS and how these tools could be used to get staff the information they needed when they needed it.

The Head Librarian appointed a task force consisting of the Instructional Designer, Library Assistant for Technology, Head of Circulation, and Reference Librarian to put together a site and to start to populate it with information. The Head Librarian served as a resource as necessary and added suggestions related to site content when applicable.

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WHAT IS A COURSE MANAGEMENT SYSTEM?

CMS is software designed for teaching and learning. Library staff may be familiar with the acronym CMS in other contexts. For example, in web development, CMS stands for Content Management Systems. In the area of instructional technology, CMS is used to represent Course Management Systems, which are also commonly called Learning Management Systems (LMS) and Learning Course Management System (LCMS). These systems are designed primarily for use by faculty or corporate trainers to create online or blended instruction. Many educational and corporate institutions also use this software as a centralized location to share asynchronous and synchronous educational materials.

This CMS environment allows users to self-pace through materials or access just-in-time materials that are needed for daily work. CMS sites serve as locations to share educational materials, but can also act as warehouses or centralized repositories where staff and co-workers can share documents and materials in addition to educational information. A CMS can also act as a knowledge management system, becoming a place for collaboration and communication in the process of teaching and learning, as well as a place for the use of other electronic media.

A group within a CMS creates a common environment where materials can be shared without the knowledge of HTML, so anyone can be the creator and editor. Use of a CMS allows the editors to manage shared knowledge or training materials and other important documents among a staff of many. This facilitates training especially when there is little overlap of schedules. It also allows editors to develop a centralized location to store important materials and documents. A CMS is also a location for communication. It provides e-mail to group members, discussion boards, chat rooms and note-taking locations for members of the group.

Great Valley Library staff use a software system called ANGEL, which is an acronym for A New Global Environment for Learning. As the ANGEL Learning site explains, ANGEL provides “engaging communication and collaboration capabilities” that “augment instruction to deliver leading edge teaching and learning.” This product was developed by a faculty member from Indiana State University for use by other faculty members. It was sold to CyberLearning Labs, which is now ANGEL Learning. ANGEL is continuously monitored and upgraded by ANGEL Learning but was also customized specifically for Penn State. Not only is ANGEL a location in which to place course materials, but in addition to those resources, faculty, staff, and students (members of the Penn State community) can build a Group. Groups can be built for

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study, interest groups, or projects. It was decided that an ANGEL Group would be the perfect vehicle to support the Library's learning needs. All library staff and librarians were entered as members of the Library Group. Similar to student and faculty who use the system, each library team member uses his or her ID and password to access ANGEL. Groups can be set to public or private, limiting who can access the site, an important concept when internal library procedures are to be posted as part of the content. Currently this site is set to private and a moderator enrolls members of the staff. If one is interested in setting up a similar site, CMSs are commonly accessible on college campuses. If one is not available, open source CMSs such as Moodle can be used via the Internet. A new trend configures a blog into a CMS but privacy issues may arise with this solution as documents are open to the public.

RATIONALE AND GOALS

As the ANGEL site developed it soon became evident that it provided a number of advantages for staff training. First, it was available anytime and anywhere. This is very important because Great Valley Library staff report to Penn State University Libraries, whose administrative offices are located three hours away in State College, Pennsylvania. Librarians and library assistants frequently travel to the University Park Campus. While in discussions at that campus, they sometimes require access to library procedures or need to troubleshoot a situation from other locations when attending a conference.

ANGEL's flexible access also promotes just-in-time learning, particularly when new policies and procedures are implemented or if a staff member faces an infrequent situation that has a set policy. This just-in-time learning also promotes cross-training as it easily allows staff to learn procedures that are not normally in their skill sets. The procedural documentation found in the ANGEL site ensures that all staff can access the same information and that no one is faced with "winging it" because the expert in a particular area is not currently in the library.

The site also promotes better communication by allowing staff access to materials they may not normally see. Librarians can create *ANGEL Pages*, online pathfinders that are attached to a faculty member's course. These pages are only available to other librarians, and the faculty member and students in the specific course. If students ask questions that involve information in the pathfinders, normally library staff would not be able to look at the pathfinder. By adding copies of the ANGEL Pages to a folder in the Library ANGEL site everyone on the library staff gained access to these pages.

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Finally, the site provides access to schedules making it is easier for those not in the library to know who is working at any one time. This is crucial at times of emergency closure or when a staff member suddenly becomes ill and the Head of Circulation, Head Librarian, or other responsible party tries to figure out how to keep the Library open.

ADULT LEARNING AND THE CMS

In addition to the practical advantages of using a CMS to provide access to training information, the tool provides a number of benefits related to work-based and adult learning. Work-based learning is important because it permits staff to learn processes in a situation that is, as described by Allan, “closely linked to the needs of the library, contextualized to the workplace, and flexible in terms of time, place and staff involvement.” As Library staff use the CMS, they understand more about how University Libraries and the Great Valley Library function as well as gain the ability to serve patrons immediately without asking for assistance from another staff member.

Adult learning theory contributes several concepts that make the use of the CMS effective. First, adults want to use what they learn today to make their lives easier tomorrow. Use of the CMS not only permits staff to obtain answers to questions immediately but also helps to reinforce concepts if a person looks up the same information a number of times. Adult learners also want to be able to use their already acquired experience. The CMS allows staff members to link what they already know about the library to new knowledge that is included in the content area. Finally, adults learn more effectively when they are active participants in their learning. By connecting to the content of the CMS as they perform their job, they have the opportunity to interact with a learning environment that meets their immediate needs.

CREATION PROCESS

As discussed in a previous section, Library staff had numerous means of acquiring information including a binder full of printed e-mail alerts about technology problems, policy memoranda from the Head Librarian, and telephone numbers and other general information covering library operations. The staff would try to verbally inform other staff members about issues and staff members would leave the ubiquitous post-it notes with news. However, often a staff member looking for specific information would not remember that something was in the paper file or

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would not be able to locate it. Post-it notes get lost and there was always one staff member that “didn’t get the memo.” Using ANGEL seemed to be an appropriate means of communication since it would be the one place to seek answers, and if organized properly, locating information would be less cumbersome. Additionally, it would be easier to quickly add, update, and change information. Before the Library Staff User site could come into existence, several issues had to be addressed:

- Who would be responsible for creating, maintaining, and updating information?
- Who would train the rest of the staff to use the site?
- Besides the “content feature” would any other elements of ANGEL be utilized?
- What information should the site contain?

Initially, editing rights to the site were given to the Head Librarian and Reference Librarian, Head of Circulation, and Assistant for Technology. A current review indicates that all staff should have rights to insert new information as needed. All members of the editing team can create files, upload documents, and add web links, etc. The Assistant for Technology became the site moderator, enrolling others, and keeping the content current.

ANGEL TRAINING

The Assistant for Technology instructed staff members in the use of ANGEL. Training consisted of hands-on, one-on-one instruction with each staff member. Staff members who had not previously used ANGEL were taught how to fill out their “profile,” which consisted of identifying information. A demonstration of the “theme selector” showed staff how to customize the look of ANGEL if they wished. Training also included a demonstration of accessing the information in the “Content” folder as well as a discussion of the other features available in ANGEL.

In addition to the content feature, ANGEL also provides e-mail, message boards, and a calendaring feature. The “My Files” feature is a convenient means of transporting files between computers. The library staff have access to a university-wide e-mail system and its accompanying calendar system, so the e-mail and calendaring features on ANGEL have not been utilized by the group. The message board has been used for discussion of projects.

The Content area is the feature most extensively used by the group. As a starting point to creating content, the Head of Circulation and Assistant for Technology

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discussed information that is usually communicated to a new staff person. It was decided that the site should include the basics such as opening and closing procedures, contact information for other staff members, circulation desk procedures, and information about equipment maintenance. The pair decided to prepare Word files with the types of instructions normally communicated verbally to new staff members. In addition, links to existing University Libraries web pages with circulation, acquisitions, and course reserve procedures were added to make access easier for the staff.

Once procedures were written, the written instructions were distributed to team members and asked for input to ensure the inclusion of all steps of each process. Then the procedures were placed into ANGEL. Other staff members were asked to access ANGEL and proofread the postings.

Having many eyes read the ANGEL postings reinforced procedures and also made sure that all process steps were included.

As library team members became more familiar with using ANGEL, the decision was made to include more circulation procedures. The circulation system had been upgraded and was quite different from the previous Telnet system. An informal survey was conducted to identify the most troubling or confusing new circulation procedures. Screen captures and dialogue were used to assist staff and circulation trainers in realizing the process of the new procedures for themselves.

Faculty members asked the librarians to prepare ANGEL Pages for courses. These pathfinders contained database and text resources that could be used for student research and projects. Only students who are class members can access these pages. As mentioned earlier, the pages were loaded into the library staff site in the event of student questions.

Sometimes the obvious takes a bit more time to become obvious. An unexpected snowstorm closed the library for the day. The evening before the storm, the Head of Circulation revised the phone list to include a new staff person. The information was hanging on the staff bulletin board and saved on her computer, which was not helpful since she was snowed in at home. After that snow day, it was decided to add the staff phone list and staff schedules to ANGEL; ANGEL could be accessed remotely and the inclusion of the staff phone list is a significant improvement in communications for the library team in case of emergency.

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Since all staff members could access the site on a regular basis the team also decided to use it to upload items that could be used for their professional development. Web sites of interest, blogs, articles, and other materials to enhance professional development were posted for the staff to read (see [Figure 6.1](#) and [Figure 6.2](#)). Links to Webinars were also included.

ADVANTAGES BEYOND BASIC TRAINING

As discussed, the system has many advantages for training and serves as an important resource for staff but there are important by-products of using it that are not directly equated with library training. The first is that since ANGEL is used by many faculty members and students, using it as a training site gives staff a better understanding of what a course management system is and how it can be used. When students talk about ANGEL, everyone in the library has experienced it. In addition, the staff get to know the vagaries of the CMS. For example, for a while it was not possible to use Firefox to print from ANGEL. Links to electronic reserves on faculty ANGEL sites give students instant access to course reserves. Since students ask all kinds of questions including how to use the CMS, the staff are better prepared to answer these types of questions. Finally, the use of ANGEL allows the Library to incorporate a number of technologies in one place. The CMS permits linking to

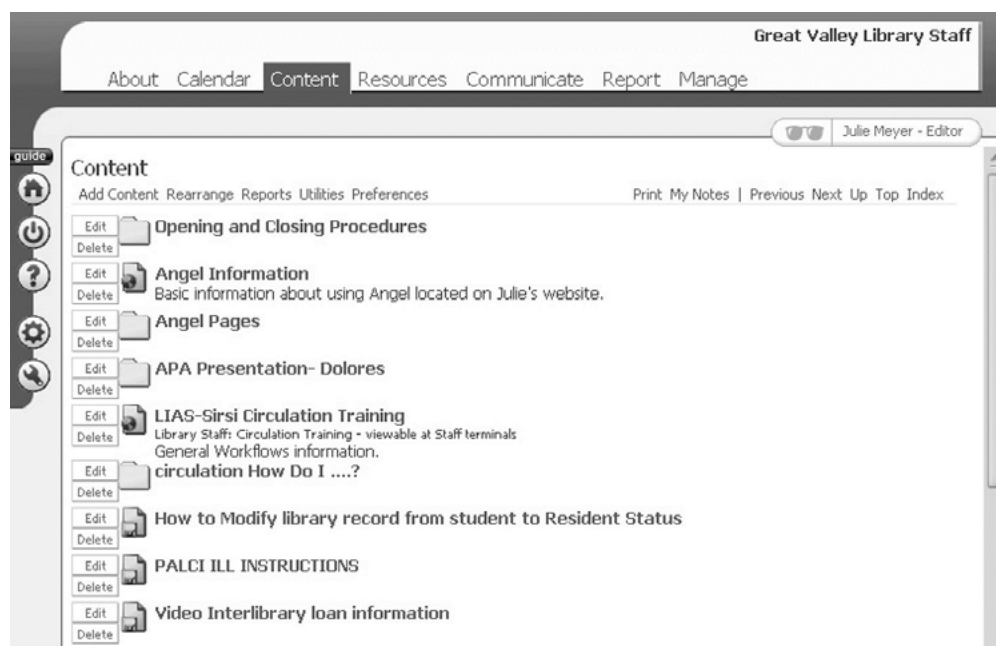


Figure 6.1 • Main page of Penn State Great Valley Library ANGEL training site

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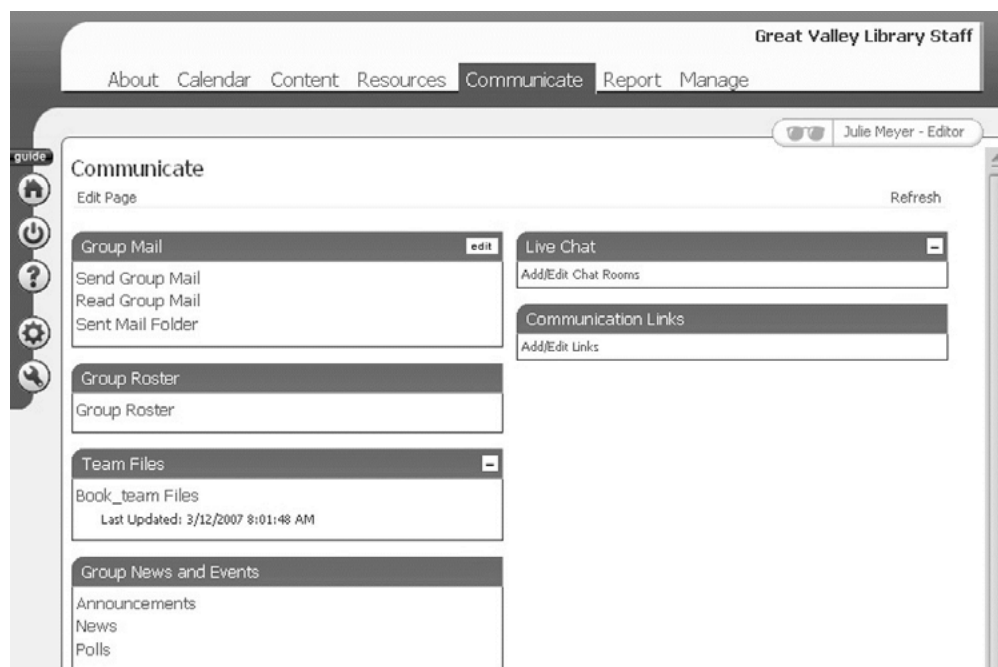


Figure 6.2 • ANGEL site communication resources

important websites, such as suggested external blogs or Webinars as well as internal Penn State sites. Although some of the communication tools such as threaded discussions have not been used very much, these resources will be valuable later for brainstorming or other information sharing.

CHALLENGES

The Great Valley Library ANGEL page has given staff immediate access to just-in-time learning, provided them with up-to-date information and opened lines of communication about policies and procedures. There are some disadvantages. Although the current Library staff are very technologically savvy and willing to try anything new, there have been times in the past when staff members were not as comfortable with new technology. For those people this was one more product they had to be willing to learn.

A second issue is that ANGEL is not as available as the Libraries' home page and the circulation system, both of which are up and ready on terminals at the Circulation Desk at all times. A staff member must remember to go into ANGEL and login at the appropriate time. This means that employees, particularly new ones, must

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occasionally be reminded that the site exists. Using ANGEL does require some training and this must be added to the training list for new employees.

Another issue, at least in the beginning is remembering to consistently add to the site when policies, etc. are announced. The Head of Circulation routinely uses the site to add new procedures and information and the Library Assistant for Technology uses it as a working tool, but not everyone is as diligent. For the site to be successful it must be kept up to date and everyone must contribute to it.

Finally, occasional upgrades of the ANGEL system require retraining just as any online library tool would. Most of these upgrades are minor but sometimes new versions create a need for training.

FUTURE CONSIDERATIONS

Future training and environments for sharing materials are changing and growing every day. Sites need to be dynamic, and users need to be able to interact, collaborate, and communicate within systems. ANGEL allows users to become creators and editors. The CMS will grow into a portal as environments become blended and tools are accessed through the course management system. Some of these tools include synchronous conferencing solutions, blogs, wikis, and podcasts. Even virtual environments such as Second Life will become important resources that permit just-in-time learning opportunities that meet staff's learning styles. All of these factors will impact the use of a CMS in the future. This information is also becoming mobile and users will want to interact with systems using Blackberry and Smartphone devices. Learners are now syncing MP3 players and iPods to connect to resources and accessing audio and video distant from Internet connections. It will be important to monitor how the CMS can be used by those who use such equipment. Finally, as with any technology, it is important to ensure that the ANGEL site is fully accessible for those with visual impairments or other learning concerns; this step is in process now that the site is up and running and content has been added.

CONCLUSION

Decades ago, the ability of computer programs to create a paperless workplace was predicted. There would be no more overflowing file cabinets. The printed paper item would become obsolete. While the computer works well as an individual personal filing system, many people still have overflowing file cabinets stuffed with backup copies. The problem with a computer file accessible only by one is that it reduces the

COURSE MANAGEMENT SYSTEMS

FOR STAFF DEVELOPMENT AT PENNSYLVANIA STATE GREAT VALLEY SCHOOL OF GRADUATE PROFESSIONAL STUDIES

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efficiency of communicating information to a team or group. The Penn State Great Valley Library ANGEL (Course Management System) site provides the staff with a place to instantly access resources needed for just-in-time training. As with any technology, one must deal with issues of training and software upgrades. This system gives staff flexibility in locating updated policies, procedures, and resources and provides staff development opportunities. Barbara Allen said that “libraries require a flexible and skilled workforce if they are able to maintain and develop relevant services.” The implementation of this CMS training site has not only taken Great Valley Library staff training into the 21st century but has provided staff with a way to keep up to date on topics of importance as they perform their daily work.

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