



International Federation of Library Associations and Institutions
Fédération Internationale des Associations de Bibliothécaires et des Bibliothèques
Internationaler Verband der bibliothekarischen Vereine und Institutionen
Международная Федерация Библиотечных Ассоциаций и Учреждений
Federación Internacional de Asociaciones de Bibliotecarios y Bibliotecas

IFLA Publications 116

Continuing Professional Development – Preparing for New Roles in Libraries: A Voyage of Discovery

Sixth World Conference
on Continuing Professional Development
and Workplace Learning
for the Library and Information Professions

Edited by
Paul Genoni and Graham Walton

K · G · Saur München 2005

IFLA Publications
edited by Sjoerd Koopman

Recommended catalogue entry:

**Continuing Professional Development –
Preparing for New Roles in Libraries: A Voyage of Discovery**
Sixth World Conference on Continuing Professional Development
and Workplace Learning for the Library and Information Professions
[International Federation of Library Associations and Institutions].
– München : Saur, 2005, 307 p. 21 cm
(IFLA Publications ; 116)
ISBN 3-598-21844-3

Bibliographic information published by Die Deutsche Bibliothek

Die Deutsche Bibliothek lists this publication in the Deutsche Nationalbibliografie;
detailed bibliographic data is available in the Internet at
<http://dnb.ddb.de>.



Printed on permanent paper

The paper used in this publication meets the minimum requirements of
American National Standard – Permanence of Paper
for Publications and Documents in Libraries and Archives
ANSI/NISO Z39.48-1992 (R1997)

© 2005 by International Federation of Library Associations
and Institutions, The Hague, The Netherlands
Alle Rechte vorbehalten / All Rights Strictly Reserved
K. G. Saur Verlag GmbH, München 2005
Printed in the Federal Republic of Germany

All rights reserved. No part of this publication may be reproduced, stored in a retrieval
system of any nature, or transmitted, in any form or by any means, electronic, mechanical,
photocopying, recording or otherwise, without the prior written permission of the publisher.

Printed / Bound by Strauss GmbH, Mörlenbach

ISBN 3-598-21844-3
ISSN 0344-6891 (IFLA Publications)

TABLE OF CONTENTS

Paul Genoni and Graham Walton FOREWORD	9
Ann Ritchie CONFERENCE OPENING ADDRESS	11
INAUGURAL ELIZABETH W. STONE LECTURE, 2005	
Blanche Woolls CONTINUING PROFESSIONAL EDUCATION TO CONTINUING PROFESSIONAL DEVELOPMENT AND WORKPLACE LEARNING: THE JOURNEY AND BEYOND	14
PREPARING FOR NEW AND CHANGING ROLES	
Sheila Corral DEVELOPING MODELS OF PROFESSIONAL COMPETENCE TO ENHANCE EMPLOYABILITY IN THE NETWORK WORLD.....	26
Biddy Fisher, Gillian Hallam and Helen Partridge DIFFERENT APPROACHES – COMMON CONCLUSIONS: THE SKILLS DEBATE OF THE 21 st CENTURY.....	41
Kari Gulbraar DEVELOPING FOR THE NEW ACADEMIC LIBRARY FUNCTION: KNOWLEDGE AND SKILLS REQUIREMENTS AMONG LIBRARY PERSONNEL AND TEACHING FACULTY	53
Elvira Basibas Lapuz THE CHANGING ROLES OF LIBRARIANS AND INFORMATION PROFESSIONALS: RECOMMENDATIONS FOR CONTINUING PROFESSIONAL DEVELOPMENT AND WORKPLACE LEARNING IN ACADEMIC LIBRARIES.....	75
Corinne Laverty EDUCATIONAL TECHNOLOGY: HARNESSING NEW TOOLS TO SUPPORT INFORMATION LITERACY.....	83
Lindsey Martin THE BESPOKE APPROACH TO DEVELOPING AND DELIVERING ONLINE STAFF DEVELOPMENT	90
Lotta Haglund BECOMING A MARKETING SPECIALIST IN AN ACADEMIC LIBRARY	102

Ganga Dakshinamurti and Betty Braaksma PREPARING ACADEMIC LIBRARIANS FOR A CHANGING ROLE: A CASE OF A CANADIAN INFORMATION LITERACY PROGRAMME	112
---	-----

ENGAGING AND SUPPORTING PEOPLE IN CPD & WORKPLACE LEARNING

Lynda Ayiku, Anthea Sutton, Alison Turner, Andrew Booth and Alan O'Rourke MEETING THE CPD NEEDS OF THE E-LIBRARIAN	126
---	-----

Jana Varlejs and Marilyn Wilt AN ONLINE COURSE FOR RESEARCH LIBRARY ASSISTANTS: DESIGN, IMPLEMENTATION ISSUES, AND OUTCOMES	137
---	-----

Graham Walton, Jamie Thompson and Deborah Trayhurn EFFECTIVE WORK BASED LEARNING ACROSS PROFESSIONS AND THE IMPACT ON THE ROLES OF LIBRARY AND INFORMATION SERVICES: A CASE STUDY OF U.K. PROBATION WORKERS	148
--	-----

Donna Chan and Ethel Auster UNDERSTANDING LIBRARIANS' MOTIVATION TO PARTICIPATE IN PROFESSIONAL DEVELOPMENT ACTIVITIES	157
--	-----

Chris Erickson HOW DO THEY KNOW WHAT THEY DON'T KNOW? CREATING A DIGITAL PRESERVATION TRAINING PROGRAM.....	170
---	-----

PUTTING IT TOGETHER – TOOLS FOR CPD & WORKPLACE LEARNING

Rae-Anne Montague and Marianne Steadley MULTIFACETED CPD: DEVELOPING A PROGRAM TO MEET THE DIVERSE NEEDS OF LIS PROFESSIONALS	180
---	-----

Jerry Nichols, Michael Koenig DEVELOPMENTS IN POST MASTERS EDUCATION FOR PUBLIC LIBRARY ADMINISTRATION IN NORTH AMERICA: WITH PARTICULAR REFERENCE TO THE PUBLIC LIBRARY ADMINISTRATORS' CERTIFICATE PROGRAM AT THE PALMER SCHOOL OF LIBRARY AND INFORMATION SCIENCE	192
---	-----

Sylvia E.A. Piggott COMPETENCY BASED TRAINING: A SPECIAL LIBRARY ASSOCIATION (SLA) STRATEGIC PROFESSIONAL DEVELOPMENT TOOL FOR THE 21 st CENTURY	198
--	-----

Sue Roberts MULTI-PROFESSIONAL WORKING AND LEARNING? – TEAMS OR TERRITORIALISM IN THE E-LEARNING AGE	206
--	-----

Gail Dickinson	
THE IMPACT OF NATIONAL BOARD CERTIFICATION FOR SCHOOL LIBRARY MEDIA SPECIALISTS.....	216
Sudhir Kumar and Leena Shah	
EVALUATING EFFECTIVENESS OF CPD AND MEASURING RETURNS ON INVESTMENTS: A CASE STUDY OF UGC REFRESHER COURSES (INDIA).....	226
Alison Turner, Linda Ferguson and Pauline Blagden	
UNDERSTANDING THE BIG PICTURE: WHAT IS NEEDED FROM A PROFESSIONAL DEVELOPMENT PROGRAMME TO SUPPORT HEALTH SERVICE LIBRARIANS IN ENGLAND?	237
Janelle M. Zauha	
LEADERSHIP TRAINING FOR ALL: PROVIDING OPPORTUNITIES FOR DEGREED AND NON-DEGREED LIBRARIANS IN A REGIONAL INSTITUTE	245
CONTEXT AND PLACE: INTERNATIONAL PERSPECTIVES ON CPD & WORKPLACE LEARNING	
Amanda Cossham, Alison Fields and Gillian Oliver	
WHERE TO FROM HERE? CONTINUING PROFESSIONAL DEVELOPMENT IN NEW ZEALAND	256
Ujala Satgoor and Susan Schnuer	
INTERNATIONAL PARTNERSHIP, NATIONAL IMPACT: THE SOUTH AFRICAN LIBRARY LEADERSHIP PROJECT	267
Anna Maria Tammaro	
RECOGNITION AND QUALITY ASSURANCE IN LIS: NEW APPROACHES FOR LIFELONG LEARNING IN EUROPE	276
Clare M. Walker	
SERVICE EXCELLENCE: A CAMPAIGN TO BUILD CAPACITY TO MATCH SERVICE DEMANDS IN A LARGE SOUTH AFRICAN UNIVERSITY LIBRARY	287
Jean Yeoh	
REGIONAL ACADEMIC LIBRARY AND INFORMATION TRAINING CONSORTIA IN THE UNITED KINGDOM AND IRELAND: A MODEL FOR SUCCESS.....	298

FOREWORD

The papers collected in this volume have been selected from the proceedings of the Sixth World Conference on Continuing Professional Development and Workplace Learning for the Library and Information Professions. The Conference was held in Oslo from 10-13th August, preceding the 71st World Library and Information Congress of the International Federation of Library Associations (IFLA). The Conference was the first conducted under the auspices of the IFLA Continuing Professional Development and Workplace Learning Section, formerly the Continuing Professional Education Round Table (CPERT).

Since the first conference in the series was held at the Moraine Valley Community College, Chicago, in 1985, the Conference has become established as the leading international meeting dedicated to the practice and theory of continuing professional development for library and information professionals. It is testimony to the importance of the conference that the call for papers for this Sixth World Conference attracted in excess of eighty submissions from all corners of the globe.

The Conference was conducted under the theme 'Preparing for New Roles in Libraries', a reminder that the library and information professions continue to be buffeted by various technological, social and economic factors that induce ongoing change and the emergence of new professional roles. The constant need to be both proactive and reactive to the pressure of change cannot have impacted so significantly on other professions as it has on the library and information profession. Indeed it is change that it is at the heart of the need for ongoing professional development. We are confident that the papers presented in this volume will be an invaluable source of information and inspiration.

We are also pleased to be able to present in this volume the text of the Inaugural Elizabeth W. Stone Lecture, presented by Blanche Woolls. As recounted in this lecture, Dr Elizabeth Stone was both the driving force behind the creation of CPERT and its first President. That the Section continues to be such an active and influential component of IFLA is due in a large way to Dr Stone's initial vision and energy. It is the intention that the Elizabeth W. Stone Lecture will be a highlight of future conferences as a means of honouring the ongoing importance of her contribution.

The editors would like to thank those who joined them on the Program Committee for their diligence and thoughtfulness; Ann Ritchie (Northern Territory Library, Darwin, Australia) and Ian Smith (La Trobe University Library, Melbourne, Australia). All abstracts and written papers were submitted to an independent refereeing process. Not all papers or workshops presented at the Conference are represented in this collection, and we would like to express our gratitude to all those who contributed to the success of the Conference by sharing their expertise and knowledge. We also wish to acknowledge K.G. Saur for their continued role in bringing these important papers to a wider audience.

Dr Paul Genoni

School of Media and Information
Curtin University of Technology
Australia

Dr Graham Walton

Service Development Manager
Loughborough University Library
United Kingdom

CONFERENCE OPENING ADDRESS

CPDWL Section of IFLA satellite conference: 10th –13th August 2005, Oslo, Norway.

Ann Ritchie

Chair

Continuing Professional Development and Workplace Learning Section

Welcome to the Sixth World Conference on Continuing Professional Development and Workplace Learning for the Library and Information Professions. The theme of our conference which we will explore for the next two and a half days is: *Continuing Professional Development – Preparing For New Roles In Libraries: A Voyage Of Discovery*. And we hope it will be a 'voyage of discovery' for all the conference participants, including those who will be contributing their presentations.

My name is Ann Ritchie and I am the Chair of this IFLA Section. We are delighted to welcome you all here to the Oslo University College, and wish to thank our partners in this conference – the Faculty of Journalism, Library and Information Science. We also wish to thank our sponsors for their generous support.

Background

It was twenty years ago that the first World Conference on Continuing Education for the Library and Information Science Professions was held in August 1985, before the Chicago meeting of IFLA. And twenty years on, we are holding the sixth conference of this type and the first since we have achieved Section status in IFLA in 2002 and became the Continuing Professional Development and Workplace Learning Section.

This year, the conference Call for Papers attracted more than eighty abstracts from all parts of the world, and the final selections for presentations which we will be hearing over the next couple of days, represent contributions from all types of libraries and demonstrate an extremely high quality of scholarship.

In our voyage of discovery, we will be exploring the theme of 'new roles in libraries' and how our presenters have charted the waters and prepared themselves and their colleagues for these new roles, through their professional development and learning activities and programs.

We will hear about examples of new roles on the high seas of the broader information industry, and about how the profession is reinventing itself to adapt to changing environmental conditions, increased demands and expectations of clients and stakeholders, and much about the influences of technology. We will hear about competency frameworks which can help us to 'futureproof' ourselves, to make sense of the changes and to prepare ourselves to ensure we have the skills which give us a place in the world. We will be challenged to learn from others' research and their experiences, and contemplate how we can apply this evidence to our own situations. And we will have opportunities to talk to our colleagues about the issues that have been raised and the solutions offered.

And finally, I hope we will be challenged to take home what we learn and apply it to our professional practice. In this way, we are the role models for our colleagues whom we encourage to be part of a continuous improvement process.

The voyage from CPERT to CPDWL

Before we commence the presentations I would like to set the scene with a few introductory remarks about the evolution of the Section, and the reasons that the name was changed from the Continuing Professional Education Round Table (CPERT) to the Continuing Professional Development and Workplace Learning Section. In particular, I would like to highlight the inclusion of the concept of workplace learning.

The change of name signified a broader scope and placed an emphasis on a number of distinguishing characteristics which deserve some reflection.

Firstly, it broadened the concept of continuing professional education to that of continuing professional development, taking in all aspects of a professional's role, and recognising that education is only one of the ways in which individuals continue to learn, grow and develop as professionals throughout their working careers and their professional lives.

Secondly, the addition of the concept 'workplace learning' signified the inclusion of all the different types of developmental activities associated with the workplace – both the formal staff development and training programs of our workplaces, and the less formalised learning opportunities which occur within our normal working lives. Examples of these include work-based mentoring and coaching, and the focused learning that occurs in discrete projects and work experience placements.

Thirdly, the alignment of continuing professional development with workplace learning suggests that workplace learning activities have an important contribution to make towards continuously improving the quality of our workforce and raising standards of professional practice. So the more we can recognise workplace learning as valid and useful, and the more we can incorporate it into our planning as a training and professional development strategy, the more value we will get from it.

And fourthly, I believe it is worth thinking about the fact that as a profession, librarianship is only in the early stages of implementing structures and processes for continuous quality improvement in professional practice. Professional associations have a leading role to play here, because they are the bodies charged with responsibility for maintaining standards for education, as well as professional practice. Some of the papers we will hear in this conference will elaborate on these latter themes about quality improvement and the role of professional associations in setting and maintaining standards of education and professional practice; and a number will develop themes about the value and function of workplace learning activities in building an integrated competency framework.

The importance of workplace learning

In recent times there has been some research done into the value of workplace learning. Jana Varlejs (1997) reported on the findings of a survey of members of the American Library Association, noting that librarians in the survey spent three times as many hours on self-directed workplace learning than in formal continuing education.¹

The March 2004 issue of the *International Journal of Training and Development* is devoted to the theme of workplace learning, and Senker & Hyman² in their editorial, noted that research in Holland showed that there is a considerable amount of learning occurring in the workplace. They provided the example of the success of the Japanese engineering industry between the 1950s and 1990s, stating that this was probably due 'more to companies' ensuring that their engineers and other employees received balanced experience in work, rather than to the quality of Japanese education or formal training'.

In their book entitled *Life, Work and Learning: Practice in Postmodernity*, Beckett and Hager³ explored the concept and practice of workplace learning. They outlined six main

features of practice-based, workplace learning, which they characterised as being organic/holistic; contextual; activity- and experience-based; arising in situations where learning is not the main aim; activated by individual learners rather than by teachers/trainers; and often collaborative/collegial. They illustrated these features of practice-based learning by exploring workplace case studies of mentoring, project work, and integrated competencies. These are all activities which can occur on our everyday workplaces.

One of the main themes of the book is that professional judgement is learned best in context, and therefore, the workplace has advantages for professional development over a traditional 'front end' model of education which occurs in educational institutions and doesn't provide the same opportunities for integrating theory and practice. We intend that the Section will focus more on workplace learning and will incorporate more workplace learning research and practice into its program.

The way forward

As with any voyage, it is important to have a destination, and more pragmatically, a way of getting there. For the Section, we have a broader scope – professional development in all its aspects and workplace learning with all its challenges.

At this conference, we are on a voyage of discovery. For the next few days we will sail in the same ship, expertly guided by our presenters in the exploration of new and emerging roles in libraries and about how we can prepare for these through our continuing professional development and workplace learning activities.

For participants in this conference, and for our colleagues in all types of libraries – librarians, library technicians, library assistants and others who have a vested interest in the 'library of the future', the proceedings of this conference propose that there are ways by which we can actively create our own future.

I am very pleased to launch the metaphorical 'good ship CPDWL' and wish all on board an inspiring voyage to our destination – a conference which will add to our own professional development and will contribute to the future knowledge base of the Section and the profession.

References

- ¹ Varlejs, J. Facilitating workplace learning. In: Layzell Ward, P. & Weingand, D. E. (eds.) *Human Development: Competencies for the Twenty-First Century: Papers from the IFLA CPERT Third International Conference on Continuing Professional Education for the Library and Information Professions*, Munchen: K.G. Saur, 1997: pp98-104.
- ² Senker, P. & Hyman, J. (2004). Editorial. *International Journal of Training and Development* 2004, 8 (1), 3-7.
- ³ Beckett, D. & Hager, P. *Life, Work and Learning: Practice in Postmodernity*. London: Routledge, 2002.

CONTINUING PROFESSIONAL EDUCATION TO CONTINUING PROFESSIONAL DEVELOPMENT AND WORKPLACE LEARNING: THE JOURNEY AND BEYOND

Inaugural Elizabeth W. Stone Lecture

Dr Blanche Woolls

San Jose State University
One Washington Square
San Jose, California
bwoolls@slis.sjsu.edu

Abstract

This paper traces the contributions of Elizabeth W. Stone, founder of the Continuing Professional Education Round Table (CPERT), now the Continuing Professional Development and Workplace Learning Section (CPDWL), to continuing professional development for librarians. It follows with a review of the challenges being faced currently, provides considerations for preparing programs at the present time, and offers suggestions for the future. Much of the information presented in this paper derives from the proceedings of the previous five CPERT conferences, with additional material drawn from other relevant literature.

Introduction

Elizabeth W. Stone did not invent continuing professional education (CPE) for librarians, but she certainly was a major force from the 1960s to the present, where, at the Sixth World Conference, this lecture is named in her honor. Dr. Stone's formal interest in CPE began with her work at The Catholic University of America, and her 1968 dissertation, *A Study of Some Factors Related to the Professional Development of Librarians*,¹ was the first on the subject in library and information science. She stated her concept of where CPE fits in the professional life of librarians and information scientists in her statement, "education for library and information science should be thought of as a continuum, with pre-professional education, graduate education, and continuing education as a total process, not as separate segments".²

Education for librarians in the United States began with formal, professional education, and this remains the leading interest of the profession. The rapid changes in the information world and in library and information science education increase the need for more learning almost immediately after completing professional education, but this is not always accepted by practitioners. Changing librarian's perceptions to make them aware of and willing to undertake CPE is a continuing goal.

Two basic concepts of CPE are found in a report published by UNESCO in 1972:³

- every individual must be in a position to keep learning throughout his (her) life. The idea of lifelong learning is the keystone of the learning society,
- the new educational ethos makes the individual the creator of his own cultural progress, self-learning, especially assisted self-learning, has irreplaceable value in any educational system.

In order to fulfil these concepts, Stone stated three assumptions:

- the CPE of library, information, media personnel is one of the most important problems facing the profession today,

- there are serious gaps between available knowledge and applications in library, information, and media services,
- continuing library, information, media education is a nationwide problem for which national planning is the best solution.⁴

Tracing the history of CPE and IFLA helps address this most important problem, moving from a problem to be addressed nation by nation and into an international challenge. This paper then provides evidence from previous research and writing to review and revise our current understanding of CPE, and perhaps to predict future directions and activities. After a brief history, the paper revisits the challenges to successful CPE, and makes some suggestions for the future directions for the Continuing Professional Development and Workplace Learning (CPDWL) Section.

In the beginning

Formal library education, beginning in the late 19th century in the United States, focused on preparing professionals with little attention to their education once placed in a library. In 1923, Williamson's landmark study, *Training for Library Service*, had one chapter devoted to the new concept of training that was focused "on the professional improvement of workers while in service."⁵ 'Training in Service' suggested the use of correspondence courses and in-service training for professional librarians through summer schools and institutes. While envisioned, this proposed professional improvement did not take shape for decades and little is known about such programs when they did exist.

Elizabeth Stone, with Ruth J. Patrick and Barbara Conroy, conducted a National Commission on Library and Information Science (NCLIS) sponsored study to determine whether a central mechanism existed for providing information about CPE programs. One recommendation from this study was a new organization, the Continuing Library Education Network Exchange (CLENE), founded at the American Library Association's (ALA) 1975 annual meeting. CLENE was an independent national organisation housed at The Catholic University where Stone organized the fund raising activities which allowed the organisation to carry out several institutes and home study courses and to establish criteria for quality programs. Membership did not grow as hoped and funding was problematic, forcing the CLENE Board, hoping staff services at ALA could bring assistance, to petition ALA Council to move CLENE to ALA. This resulted in the establishment of The Continuing Library Education Network and Exchange Round Table (CLENERT). Although Samuel Rothstein, Director of the School of Librarianship of the University of British Columbia, proposed that ALA be the office for CPE in 1965,⁶ it was not until 1984 that CLENE made that move.

Elizabeth Stone's idea for a world seminar on CPE began in 1977 at the annual International Federation of Library Associations and Institutions (IFLA) meeting in Brussels, but it was not until 1985 that funding could be secured to hold such a conference. The site chosen was the Moraine Valley Community College outside Chicago, and the dates chosen were immediately before IFLA's Chicago conference. Stone described the holding of the First World Conference as "a sign of the 'growth' in importance of the concept of continuing education in the profession".⁷

This very successful event produced an eight-point plan of action that was submitted to the IFLA Professional Board. The creation of the Continuing Professional Education Round Table (CPERT) was approved at the Board's April 1986 meeting, and Elizabeth Stone became the inaugural Chair of the Round Table.

CPERT is noted for its timely activities. Program meetings were held at each succeeding IFLA conference beginning with the first in Japan in 1986. At each of the first meetings, a survey was taken of attendees to confirm priorities for the Round Table. A

newsletter was created and mailed to persons who had indicated an interest in CPERT - a list of over 600 persons in 63 countries. Dr. Stone sent update letters reporting the status and activity of the Round Table, and a membership brochure was produced.⁸

From October 10-14, 1988, CPERT sponsored the first International Symposium on 'Current Professional Education: Current Issues and Needs' at the Matica Slovenska, The Slovak National Library in Martin, Czechoslovakia. There were 45 attendees representing eight nations. The conference produced seven resolutions that provided direction for CPERT. The last three of these resolutions addressed CPE needs:

- the use of a wide variety of learning methodologies in CPE sessions,
- the appropriate application of learning theory and adult learning principles to enhance CPE quality and effectiveness,
- research in the field of CPE, especially with regard to the effectiveness of various methodologies developed for adult learners.⁹

Brooke E. Sheldon chaired a committee which developed a Long Range Plan for CPERT that was approved by the CPERT members during the 1991 IFLA Conference in Moscow and became a part of IFLA's *Medium-Term Programme 1992-1997*. The four action plans for achieving the 1992-1997 goals included developing the 2nd World Conference in Barcelona, increasing membership, expanding the newsletter in order to provide an exchange of international staff members, and stimulating research.⁸

The work of CPERT continued with three very successful pre-conferences following Barcelona: Copenhagen, Chester, VT, and Aberdeen. Papers from each of these conferences were published and presented to participants and all were added to the list of IFLA publications.

As IFLA began to dismantle its round tables, CPERT members, under the leadership of Chair Ann Ritchie, voted to become a section, the Continuing Professional Development and Workplace Learning (CPDWL) Section. The section continues the tradition established by CPERT for offering an excellent continuing education/professional development experience. At our present meeting, one finds some names from the archives of CPERT, but many of the names are new, predicting a bright, but challenging future to fulfil the vision of Elizabeth W. Stone.

Challenges

As information expands, management of and access to this information become even more critical, and require even more training for professional information providers. Smith suggests that human resource development "is a strategic imperative—nationally, organizationally, and individually".¹⁰ If we agree with this, we must acknowledge the challenges well documented in the literature about professional development and workplace learning and seek solutions.

One challenge has been the definition of CPE (see Appendix A.) as distinct from formal education. Darlene Weingand's presentation at IFLA in Bangkok describes the difference. She places CPE into the professional's life span beginning with pre-school and ending with continuing personal education or education for personal interests outside the workplace. The coursework leading to the degree is professional education, and she believes the "shelf life of a degree is approximately three years and declining".¹¹ What happens *after* the university/college/post-secondary education and degree becomes CPE.

More practical challenges include deciding what, among choices of types and topics, should be offered, who should offer it, how to motivate practitioners to continue their professional development, and which format to use. Some types of CPE gathered from the literature are listed in Appendix B. Discussion here begins with deciding what to offer among

topics. Many surveys reported in the literature were conducted to determine what CPE topics would be most attractive and would reflect the needs of potential participants, and which methods of delivery would be preferred.

Shaheen Majid's study¹² of CPE in Southeast Asian library and information science schools identified six areas: internet products and services, web page design, knowledge management, design and management of databases, online searching, and records management. These programs were unable to offer these courses because of the unavailability of resource persons or necessary facilities.

According to Ramaiah and Moorthy,¹³ professionals need help in meeting service management changes, reduced funding levels, introduction of new technologies, anticipating and satisfying the expectations of users, and exploring new possibilities for improving service deliveries. While they did not list new technologies first, it remains a strongly expressed need in most surveys of potential participants.

Introduction of new technologies

No one would question the introduction of new technologies as a catalyst for drawing librarians to CPE. Librarians, identified as early adopters of computer technology, successfully applied this technology to library management. This created a new discipline, information science, for the world of libraries and information centers and with it a sense of urgency for librarians in all positions in all types of libraries. A short time later, the advent of the Internet into the public sector generated an even more critical need for librarians to adapt technology applications.

Maxine Rochester and Ken Eustace state that "Internet access gives each librarian a platform for individual expression, opening up new opportunities for professional development and collaboration, notwithstanding the personal development benefits gained by experiencing other perspectives".¹⁴ Richard J. Smith demonstrated one of the first uses of the Internet for teaching when he posted an announcement on an electronic conference regarding his free workshop beginning August 10, 1992, to be delivered via e-mail over the Internet. "The audience was eclectic, and the need is international. Registrants included those from Canada, Brazil, Hong Kong, Finland, Israel, Taiwan, Singapore, England, Czechoslovakia, Australia, German, Slovakia, Japan, Netherlands, Greece, Norway, Switzerland, and Sweden as well as the U.S".¹⁵ The packets of information for the three and one half week workshop were mailed to participants to read at their leisure. The large numbers of participants in this early workshop predicted the potential use of the Internet that has grown with the addition of web sites.

In 1998, a library school dean talked with potential employers who expected applicants to show their homepages on the Web. The vital competencies at that time involved "concepts and applications of the Internet; the web and functions such as telnet and FTP; search engines; evaluation of searches; digital library services; and electronic resources".¹⁶ The fact that telnet is no longer a player highlights the consistent need to update skills. New technology may also demand service management changes, another area of proposed CPE.

Meeting service management changes

Service management changes include meeting the challenges of organizational change. Margaret Trask described her experience in creating a not-for-profit company in Australia, AIMA designed "to improve the standard of management in library and information services by providing CPE programs, particularly in management skills for library staff."¹⁷ Woodsworth found that employers are seeking librarians who are vying for senior management level positions, and librarians able to manage information to improve

decision making across the organisation.¹⁶ In the U.S., the perceived lack of professionals who wish to undertake senior management positions dictates a need not only for CPE, but CPE with some marketing devices to make moving up into higher management positions more attractive to possible applicants.

CPE could offer the skills needed to fight the constant budget battles that are difficult under good economic conditions and critical in bad times. Increasingly library and information professionals have to make decisions based on reduced budgets. For many countries, the budget crisis is a constant fight. Typically this challenge is met through programs and workshops that focus on public relations and marketing and those topics draw participants to CPE.

CPE is needed to encourage more librarians to desire higher level positions, a crucial need in the U.S. at least.

Anticipating and satisfying the expectations of users

The explosion of technology affects not only library staff but also patrons. Librarians offer new services that are based upon what they identify as being 'needed', and also upon the expectations of library and information users. Librarians provide training for patrons, particularly senior citizens, in the use of the Internet. They also select databases their clientele expect to find in the library. Librarians learn the new databases and then help their patrons use them.

Librarians also accept the responsibility for helping patrons become information literate at all ages through basic education, in post secondary education, and as life-long learners. Recent graduates who have no instructional design skills are ill prepared to provide information literacy training.

Librarians must also master updates for software changes as well as new technologies. Keeping ahead of software upgrades and consequent changes in hardware can be challenging, as these changes happen regularly and seemingly instantly. The creation of technologies should be monitored so that they can be adapted and adopted for use in the information community. Today's librarians must follow in the footsteps of their predecessors who adopted the computer for library management, placing them in the forefront of a new technology. To be effective users, librarians need CPE.

Who should be offering CPE?

The choices for offering CPE include institutions employing librarians, government agencies, academic library education programs, commercial vendors, and library and information science associations. Institutions employing librarians need to know their employees are competent and knowledgeable, and they may see themselves as the best providers of the training. However, the adage that an expert is someone who lives more than 50 miles away from the site implies that staff might be more receptive to training with someone other than their colleagues in the role of provider.

Training by experts from governmental agencies, national, regional networks, and state or territory agencies usually means the expert is paid and travel costs may also be borne by that agency. The training is less costly to the library. These persons are knowledgeable about the conditions in the area and can speak from first hand experience with the perceived problems. The Southeast Florida Library and Information Network (SEFLIN) is a large multi-type network conducting training and delivering a curriculum to library staff using three methods, web-based (online) training, dedicated class training (daylong, specific content, held in a member library facility), and voucher class training (vouchers used at a vendor facility).¹⁸

Many faculty members in academic library education programs gear their instruction to their students who may have little or no knowledge about libraries. The perception of some practitioners that library educators only teach theory rather than practice adds to the concern of these persons providing CPE. A few library education programs are offering CPE. Jana Varlejs highlighted three who offer online courses for CPE in North America, Rutgers, Toronto, and Wisconsin-Madison.¹⁹

Commercial vendors come in two forms, those who sell products and those who are full-time CPE providers. Vendors who sell products often provide one or more day's training in the use of their products with the installation. Other vendors are full-time CPE providers and contract with libraries or groups to train staff.

Library association meetings are regarded as excellent places to find information that will increase the knowledge of those in attendance. In the U.S. many associations offer paid workshops at times other than regularly scheduled conferences to members and other interested participants. The Special Library Association (SLA) offers certification in areas based on their organization's Core Competencies. Their goal is "to be the only place that you as an SLA member need to go to increase your value as an information professional and to further your career".²⁰

Regardless of the provider, the challenge is greater for some nations. Africa, as with other less developed countries, "is particularly disadvantaged in the sense that most of the changes in the library and information profession have occurred outside the continent. The need to keep up with these changes becomes imperative and adopting them to suit local environments is crucial".²¹

How to motivate

Jeffrey Alejandro has suggested three questions to be asked before planning CPE programs:

- What professional and personal factors lead individuals to participate in CPE programs?
- Are these factors internal or external?
- How can these factors be helpful in recruiting and retaining CPE participants?²²

Before discussing what factors lead persons to participate in CPE, it is best to recognize those factors which make CPE inconvenient and disadvantageous to their participation. Three are travel, time and cost.²³ Others include instruction that ignores the norms of behaviour and communication, emotions of participants, feelings of embarrassment.²⁴

To overcome these, Alejandro suggests extrinsic motivators such as financial benefit (bonuses or other monetary rewards) and status (promotions). Further, he mentions certificates and credentials and the awarding of the Continuing Education Unit (CEU). These are discussed in the context of recognition systems.

Distinctions about CPE: quality control and recognition systems.

Recognition systems are definitely an aid to motivating CPE and these systems are tied to a concern for quality control. Quality control in CPE, according to Varlejs²⁵ remains with the provider, and, in the context of professions is usually in terms of credentialing individuals or institutions, an activity that differs from certificates or licensure. Credentialing implies evidence of qualifications rather than a certificate of attendance. Licensure is a legal document. Those are themselves motivators. However, participants are also motivated when they receive recognition for their CPE experience with a CEU, and many questions come with

deciding a CEU. What must be offered to count one unit vs. two units? Who makes the decision of quality control and who will recognize the awarding of these units? Koltay and Teglasi echo others when they state;

The official recognition and the quality of the programmes [in Hungary] vary a lot. Libraries are not in a position to acknowledge CPE efforts; the advancement system is still run according to the 'old' rules and payment increase is not a consequence of finishing a CPE course. The knowledge and skills are useful for the individuals, but workplaces are not prepared to utilize and recognize the newly acquired knowledge.²⁶

One recognized provider in the United States, the SLA, offers CEUs to conform to the ten criteria established by the International Association for Continuing Education and Training (IACET) and they have been awarded the designation of being an Authorized CEU Sponsor.²⁷ Determining the value of a CPE offering is difficult and part of the solution is to get agencies to accept the evaluation of anyone other than that particular agency. The sponsor of CPE can affect the perceived value of the experience.

Preparing CPE programs: which venue, which format?

Darlene Weingand¹¹ listed eight possible forms of CPE: workshops and seminars, formal courses offered in classrooms, distance education, conferences, tutorials, independent study and reading, and teaching. If we consider the barriers to participants, these should all be offered close to the participant, at low cost, and require a 'reasonable' investment of time.

Models exist for preparing professional development programs. Joanna M. Burkhardt *et. al* suggests that "staging a continuing education program is a learning experience in itself".²⁸ Her four stage plan includes planning to plan, dealing with the details, the big day, and the aftermath. Another model was outlined at the Barcelona conference.²⁹ These models are more likely to be considered face-to-face instruction, with the easiest being to make training available close to the individual; that can be taken at convenient times, and that has the potential to be very low in cost. The Internet potentially fulfils each of these requirements. Development of CPE courses follows closely on the development of courseware for all types of education.

Distance education has become an attractive CPE option for librarians. Correspondence courses are always appealing because of their convenience, and the expanded opportunities afforded by technology add to the potential. "For those who live in rural communities or can't take time away from the office, getting online to take professional development courses is an attractive option".³⁰ It does require proximity to the appropriate hardware and, if it is to be interactive, access to adequate telecommunications.

Challenges for the future

CPDWL, as an international association, continues to address CPE in an international context, recognizing the challenges inherent in this. Jana Varlejs has asked the question about courses created for an audience in one country, "are they potentially adaptable for use abroad? Those that deal primarily with technology might be because the terminology and the technology are fairly universal. Difficulties might arise, however, in the interaction among students and teachers".¹⁹

Cultural differences may occur at the beginning stages of preparing CPE events. "Surveying and monitoring the market is not in our culture yet, but it has to be a vital part of assessing the needs. It is important to focus on both the traditional library sector (public, school, academic) as well as the non-traditional (profit and non-profit organizations) market as well".³¹ Other cultural differences would be found with a pilot testing. It has also been suggested that, "the world library community ought to devote attention to educational

products and develop criteria for their evaluation. It can also contribute to the definition of a standard".³²

Another method to help others as they begin CPE would be the use the suggestions given for mentoring. Group mentoring³³ and learning pairs have discussed as means of providing for professional development. CPDWL needs to find not only instructors to deliver CPE, but also potential mentors.

Predicting who will want CPE in the future means predicting the future of information agencies. We already know that bookmobiles are being sent to countries where their drivers will go beyond readers advisory to creating books on the spot for their patrons. The ability to do this comes with the digitization of resources. CPDWL must recognize that the development of CPE courses is difficult when faculties or trainers are already too busy or haven't the resources to work in a digital environment. CPDWL should consider:

- making sure programming for CPDWL sessions at IFLA addresses CPE as learning that occurs after formal education.
- assigning a CPDWL taskforce to create criteria for quality CPE that will take into consideration the global mission of the Section. As an outcome of this,
- researching the ability to offer a CPDWL certificate within IFLA for the successful completion of CPDWL sponsored CPE experiences,
- choosing one or two topics of utmost importance to a wide variety of potential participants and choose a course, one already developed or one that can be prepared quickly, that meets the criteria established by the taskforce,
- asking members of CPDWL if they would be willing to join as mentors to colleagues who would take our course,
- piloting this course over the IFLA website. The 'cost' to the user would be to send a response concerning the usefulness of the course and any expanded use,
- if the course is successful, seeking funding to provide this course as a CD to be sent to sites. The only 'cost' would be a report of the use made by the CD and the success of the course,
- continuing to plan and offer longer workshops and conferences preceding the yearly IFLA meetings.

What will be the long term benefits? "Unless pertinent and innovative continuing education programs play a much more important role in the education of librarians, a ghostly apparition will be left to haunt those libraries whose services are not very far removed from today's".³⁴ CPDWL stands alone in the international scene, and each of us must work here and within our own countries to promote CPE. What we do here will follow Betty Stone's lead. She has left us with a legacy, and the IFLA Continuing Professional Development and Workplace Learning Section can both continue and enhance her legacy here in Oslo.

Appendix A

Definitions of Continuing Education

Continuing library education (in chronological order)

1980: "is a learning process which builds on and updates previously acquired knowledge, skills, and attitudes of the individual. Continuing education comes after the preparatory education necessary for involvement in or with library media services. It is usually self-initiated learning in which individuals assume responsibility for their own development and for fulfilling their need to learn. It is broader than staff development which is usually initiated by an organization for the growth of its own human resources".³⁵

1983: “is anything that helps a person or institution do something better, learn something new, or think about something in a different way”.³⁶

1985: “short formal and information education opportunities to maintain competence and meet professional standards of practice”.³⁷

1986: “consists of all learning activities and efforts, formal and informal, by which individuals seek to upgrade their knowledge, attitudes, competencies, and understanding in their special field of work (or role) in order to (1) deliver quality performance in the work setting, and (2) enrich their library careers”.⁷

1996: “information education through seminars, conferences, and workshops”.²¹

1997: “educational activities primarily designed to keep practising librarians and information professionals abreast of their particular domain in the library or information centre, and to provide them with training in new fields”.³⁸

2000: “education that takes place once professional qualification is achieved, with the intent of maintaining competence and/or learning new skills”.¹¹

2002: “is the provision of opportunities for people to continue their learning”.¹³

2003: “Human Resource Development (HRD), defined broadly, is about developing the work-related capacity of people; people working as individuals, in teams, and in organizations. HRD is about providing people with the knowledge, understanding, skills, and training that enables them to perform effectively. HRD encompasses staff development and training, continuing professional development/continuing professional education, and workplace learning. To be effective, HRD must be an ongoing process of developing knowledge, skills, and capability”.¹⁰

2004: “is the systematic method of learning that leads to growth and improvement in professional abilities, enabling individual to function successfully in a changing work environment.... the purpose of continuing professional development CPD activities is to fill-in the knowledge gaps between formal education and the needs of the professional practice”.¹²

Appendix B

Continuing Professional Development: Let Me Count the Ways

Formal

- attending professional library association meetings, conferences
 - o professional talks
 - o pre- and post-conference tutorials
- working on professional association committees
- preparing a talk for a professional meeting
- writing a paper for publication
- preparing and teaching a course to library professionals and paraprofessionals
- taking a CE workshop or institute that provide new concepts and skills
- taking a formal course
 - o short courses

- o computer based instruction
- o distance education
- o seminars
- participate in training sessions provided by employers

Informal

- visiting exhibits at conferences
- reading professional literature
- networking/talking with colleagues
- self-taught: gaining hands-on experience with technologies
- e-mail communications
- Internet-based discussion groups

References

- ¹ Stone, E.W. *A Study of Some Factors Related to the Professional Development of Librarians*, [Unpublished] PhD. Dissertation, American University, 1968.
- ² Stone, E.W. Some historical antecedents of continuing library education. In: Asp, W.G. (ed.) *Continuing Education for the Library Information Professions*. Hamden: The Shoe String Press, 1985.
- ³ Faure, E. et al., *Learning to Be: The World of Education Today and Tomorrow*, Paris: UNAESCFO, 1972, pp181-182.
- ⁴ Stone, E.W. Toward a learning community. In: Asp, W.G. (ed.) *Continuing Education for the Library Information Professions*. Hamden: The Shoe String Press, 1985.
- ⁵ Williamson, C.C. *Training for Library Service: A report prepared for the Carnegie Corporation of New York*. Boston: D.B. Updike, 1923.
- ⁶ Rothstein, S. Nobody's baby: a brief sermon on continuing professional education. *Library Journal* 1965, 90, 226-27.
- ⁷ Stone, E.W. The growth of continuing education. *Library Trends* 1986, 34 (3), 489-513: p. 489.
- ⁸ Stone, E.W. Continuing professional education and IFLA: vision for the future. In: Woolls, B. (ed.) *Continuing Professional Education and IFLA: Past, Present, and a Vision for the Future: Papers from the IFLA CPERT Second World Conference on Continuing Professional Education for the Library and Information Science Professions*, Munchen, K.G. Saur, 1993. pp1-3.
- ⁹ 'Appendix C'. In: Woolls, B. (ed.) *Continuing Professional Education and IFLA: Past, Present, and a Vision for the Future: Papers from the IFLA CPERT Second World Conference on Continuing Professional Education for the Library and Information Science Professions*, Munchen, K.G. Saur, 1993. pp1-3.
- ¹⁰ Smith, I. Continuing Professional Development and Workplace Learning 5: Human Resource Development—A Strategic Imperative. *Library Management* 2003, 24, 443.
- ¹¹ Weingand, D.E. Describing the elephant: what is continuing professional education? *IFLA Journal* 2000, 26 (3), 198-202.
- ¹² Majid, S. Continuing professional development (CPD) activities organized by library and information study programs in Southeast Asia. *Journal of Education for Library and Information Science* 2004, 45 (1), 64.
- ¹³ Ramaiah, C.K. & Moorthy, A.L. The impact of continuing education programmes on library and information science professionals. *Library Review* 2002, 51 (1), 24-31.
- ¹⁴ Rochester, M.K. & Eustace, K. A distance dependent learning education model for continuing professional education of librarians. In: Ward, P.L. & Weingand, D.E. (eds.)

Human Development Competencies for the Twenty-First Century: Papers from the IFLA CPERT Third International Conference on Continuing Professional Education for the Library and Information Professions. Munchen: K.G. Saur, 1997. p. 1.

¹⁵ Smith, R.J. International training on the Internet. In: Woolls, B. (ed.) *Continuing Professional Education and IFLA: Past, present, and a vision for the future: papers from the IFLA CPERT Second World Conference on Continuing Professional Education for the Library and Information Science Professions*. Munchen: K.G. Saur, 1993.

¹⁶ Woodsworth, A. Learning for a lifetime. *Library Journal* 1998, 123, 62.

¹⁷ Trask, M. Meeting the challenge of organizational change: an Australian continuing education initiative for libraries. In: Woolls, B. (ed.) *Continuing Professional Education and IFLA: Past, present, and a vision for the future: papers from the IFLA CPERT Second World Conference on Continuing Professional Education for the Library and Information Science Professions*. Munchen: K.G. Saur, 1993.

¹⁸ Massis, B.E., The SEFLIN technology training program: linking lifelong staff learners through continuing professional education. In: Ward, P.L. (ed.) *Continuing Professional Education for the Information Society: The Fifth World Conference on Continuing Professional Education for the Library and Information Science Professions*, Munchen: K.G. Saur, 2002: pp61-69.

¹⁹ Varlejs, J. North American models of Internet-delivered continuing professional education: are they exportable?" In: Woolls, B. & Sheldon, B.E. (eds.) *Delivering Lifelong Continuing Professional Education Across Space and Time: The Fourth World Conference on Continuing Professional Education for the Library and Information Science Professions*. Munchen: K.G. Saur, 2001: pp9-15.

²⁰ Lowery, J. The future of professional development: a vision and a roadmap. *Information Outlook* 2004, 8 (2), 32-33: p.33.

²¹ Aina, L.O. Interest in continuing education programmes among library educators in anglophone Africa. *International Information & Library Review* 1996, 28 (1), 23-29: p. 23.

²² Alejandro, J. Understanding professionals' reasons for participating in continuing professional education. *Adult Learning*, 2001, 12 (1), 15.

²³ InFoPeople and California Library Association, *California Library Staff Continuing Education Needs Assessment*. [unpublished, 2001]. This is but one of many such studies reporting these barriers.

²⁴ Wlodkowski, R.J. Fostering motivation in professional development programs. *New Directions for Adult and Continuing Education* 2003, 98, 39-48.

²⁵ Varlejs, J. Quality control and assurance for continuing professional education. In: Ward, P.L. (ed.) *Continuing Professional Education for the Information Society: The Fifth World Conference on Continuing Professional Education for the Library and Information Science Professions*, Munchen: K.G. Saur, 2002.

²⁶ Koltay, T. & Teglasi, A. From occasional training courses to systematic thinking on the continuing professional education of librarians in Hungary. *Library Career Development* 1999, 7 (3), 21-25: p.25.

²⁷ The CEU: the standard for high-quality continuing education. *Information Outlook* 1997, 1, 38.

²⁸ Burkhardt, J.M., MacDonald, M.C. & Rathemacher, A.J. Blueprint for planning a successful program. *American Libraries* November 2001, 48-50.

²⁹ Woolls, B. Planning an international continuing education event: the Barcelona experience. In Woolls, B. (ed.) *Continuing Professional Education and IFLA: Past, present, and a vision for the future: Papers from the IFLA CPERT Second World Conference on Continuing*

Professional Education for the Library and Information Science Professions, Munchen, K.G. Saur, 1993.

³⁰ Hamilton-Pennell, C. Getting ahead by getting online. *Library Journal* November 2002, 32.

³¹ Pors, N.O., Palvolgyi, M. & Teglas, A. Hungarian CPE efforts intensified through international cooperation. In: Ward, P.L. & Weingand, D.E. (eds) *Human Development Competencies for the Twenty-First Century: Papers from the IFLA CPERT Third International Conference on Continuing Professional Education for the Library and Information Professions*. Munchen: K.G. Saur, 1997, 38.

³² Paci, A.M. LIS educational stems within CMC (computer mediated communication). In: Ward, P.L. & Weingand, D.E. *Human Development Competencies for the Twenty-First Century: Papers from the IFLA CPERT Third International Conference on Continuing Professional Education for the Library and Information Professions*. Munchen: K.G. Saur, 1997, 85.

³³ Ritchie, A. & Genoni, P. Group mentoring: a first experience in continuing education, (pp88-97); Farmer, J. & Campbell, F. Measuring continuing education needs: identifying transferable skills through mentoring (pp284-297). In: Ward, P.L. & Weingand, D.E. *Human Development Competencies for the Twenty-First Century: Papers from the IFLA CPERT Third International Conference on Continuing Professional Education for the Library and Information Professions*. Munchen: K.G. Saur, 1997.

³⁴ Wood, L.B. Viewpoint: continuing education and the survival of libraries. *Wilson Library Bulletin* 1989, 64, 74.

³⁵ National Council on Quality Continuing Education for Library and Media Personnel. *A Program for Quality in Continuing Education for Information, Library, and Media Personnel, Policy Statement and Criteria for Quality*, vol. 1. Washington, D.C.: CLNE, 1980, 1.

³⁶ Virgo, J.C. The role of the Association in developing professional competence. *Paper presented at the 20th Annual Clinic on Library Applications of Data Processing, University of Illinois at Urbana-Champaign, April 24-26, 1983*, 13.

³⁷ Trask, M. Interconnections in library and information science: career development process. In: Horne, E.E. *Continuing Education: Issues and Changes—Papers from the Conference Held at Moraine Valley Community College, Palos Hills, Illinois, U.S.A. August 13-16, 1985*. New York: K.G. Saur, 1985, 142.

³⁸ Pors, N.O. & Schreiber, T. Continuing education and information technology: a study of content and deliverables. In: Ward, P.L. & Weingand, D.E. (eds) *Human Development Competencies for the Twenty-First Century: Papers from the IFLA CPERT Third International Conference on Continuing Professional Education for the Library and Information Professions*. Munchen: K.G. Saur, 1997.

DEVELOPING MODELS OF PROFESSIONAL COMPETENCE TO ENHANCE EMPLOYABILITY IN THE NETWORK WORLD

Professor Sheila Corrall

Professor of Librarianship & Information Management
The University of Sheffield,
Department of Information Studies
Regent Court, 211 Portobello Street, Sheffield S1 4DP, UK
s.m.corrall@sheffield.ac.uk

Abstract

Key drivers of change today include rapid advances in computing and networking technologies, continuing growth of the information and knowledge economy and expectation of value-added personalised services. Related effects of environmental forces on the library and information profession include a convergence of interests around electronic delivery, a blurring of boundaries between professional specialisms and the emergence of composite services, combining libraries with other areas. Employment patterns and workplace practices have shifted towards project-based working and cross-functional teams. Vacancy advertisements for library and information workers reveal a wide range of job titles and a broader set of skills than sought historically in the sector. Research on skills needs and development priorities indicates that information professionals require a mix of specialist, generic, personal and contextualised knowledge and skills. Different models of professional competence are needed to help library and information professionals make sense of their position in the networked world, manage their own continuing development and define their unique contribution to their organisations and communities. Drawing on published literature and empirical evidence, this paper discusses the need for new conceptual frameworks and practical tools to enhance the employability of library and information professionals and presents some models developed for this purpose.

Introduction

Advances in information and communications technology (ICT) have transformed the workplace, education and society over the last ten years. Castells argues that the Internet provides both the technological basis and the organisational form – the *network* – for the ‘Information Age’.¹ Ward outlines how ICT has been the key driver of change for information professionals and has had an accelerator effect on other developments, such as globalisation, intensifying competition, the information ‘explosion’, potential democratisation of information (‘information for all’) and knowledge and information-based differentiation as a source of strategic advantage.² Lynch explains that ICT previously enabled *automation* and *innovation* in libraries, but has recently brought about *transformation* with the provision of online content, which includes both ‘born-digital’ material and digital versions of legacy collections.³

‘Convergence’ is a key phenomenon of the networked world. Johnson discusses convergence within the information industry which was traditionally divided into content *creation* (as in publishing and broadcasting), content *delivery* (as in libraries and bookselling) and content *processing* (as in typesetting and computing). Boundaries between previously separate sectors are blurring and many organisations are amalgamating previously separate activities, such as libraries, computing and publishing, under the same overall management.⁴ This trend is particularly prevalent in higher education in the US,⁵ UK⁶ and Australia,⁷ and

often extends beyond *vertical* integration of information-related functions to include *horizontal* integration with other areas where functions and activities overlap.

‘Interdisciplinarity’ and new *multidisciplinary specialisms* are influencing the development of the library and information profession. Coleman discusses the need to integrate other disciplines into professional education to prepare graduates for ‘technologically rich workplaces’.⁸ The Chartered Institute of Library and Information Professionals (CILIP) notes the emergence of *health informatics*, which integrates biomedical sciences, computer sciences and health care policy, as a ‘key issue’ for health librarians.⁹ Similarly, *educational informatics* has emerged at the intersection of information science, education and computer science, as a research field which is concerned with the relationships between people, information, ICT, learning and professional practice.¹⁰ McKnight reports a real-world example of multidisciplinary and multiprofessional convergence in the merger of a library with various educational support functions, including learning technology and academic staff development.¹¹

Against this backdrop of technological and organisational change, the roles and skills of library and information professionals continue to evolve and develop, presenting challenges for both initial and continuing professional education and development. This paper draws selectively on published literature and job advertisements to examine the development of professional roles and identify patterns and trends. It reviews research and opinion on skills needed for the new environment and evaluates examples of competency frameworks against requirements identified. It presents some models of professional roles, competences and specialisms to illuminate the position of the profession and suggests further research to take this work forward.

Developing roles – convergence and divergence

There has been much discussion, reflection and speculation on the evolving roles of library and information professionals over the past decade, especially around the turn of the century, with many authors explicitly referring to *new* roles in their discourse.¹² Some writers focus on the development of roles in specific sectors, notably the health sector in the context of *evidence-based medicine*;¹³ others concentrate on one particular role, such as the teaching role of academic librarians.¹⁴ Another subset of the literature deals with opportunities for information professionals in related and emerging fields, such as *competitive intelligence*¹⁵ and *knowledge management*.¹⁶

A recurring theme in the literature is the threat of ‘dis-intermediation’ and consequent marginalisation or even extinction of the library or information centre, arising from Internet-related developments and the ‘end-user revolution’. In the academic sector, Bell and Shank identify several developments threatening the library’s traditional position at the centre of information resource provision, including the promotion of courseware systems (also known as learning management systems or virtual learning environments) as the place where students access information resources for courses, and the establishment of institutional repositories as open archives where scholars can access research papers, rather than via the library’s collections and services.¹⁷ Other practitioners see a vital role for libraries in contributing to such developments, in collaboration with teachers and researchers.^{18,19}

The literature presents a confused picture of role development, with some sources underlining *continuity* and others emphasising *change*. In 2001, a survey of 947 American academic, school and public librarians identified the most significant roles of librarians for the next five years as follows:

- instructing users in the navigation and evaluation of print and digital information,

- directing users to appropriate information resources,
- evaluating and purchasing resources for collection development,
- organising and cataloguing resources,
- creating programmes and services for under-served communities,
- creating new guides and/or navigational tools for electronic resources,
- archiving and digital preservation.²⁰

Apart from the word ‘digital’ in two points, this list suggests that traditional roles associated with collection management and user support still dominate. Other sources reinforce this view. Braun points out that often “new roles are built on old ones”;²¹ Sharp argues that librarians can adapt established practices, such as selection, cataloguing, classification and instruction, for the networked information world;²² and Kwasik recognises that “technological demands significantly *complicate* the careers of [serials] librarians”.²³

However, some seminal reports have identified important and significant changes in the *context* of library and information work. A CILIP report on the implications of the knowledge-driven economy points to a broader concept of information management in organisations and blurred boundaries between the work of different professions. It defines ‘information’ as *all* content used in the context of an organisation, including “content in expertise databases; in learning programmes; in CRM, marketing and financial systems; in research reports and surveys; as well as in external information products and services”. It also sets out some diverse responsibilities associated with information management in this context:

- establishing information strategies, policies, standards, and good practices,
- creating enterprise wide information architecture enabling the integration of all internal and external information,
- managing the information flows within core business processes,
- supporting communities with highly relevant information,
- encouraging creativity through information,
- supporting the supply chain with content rich extranets.

CILIP notes that many professionals now have *information-intensive* roles and argues that “information management and specialisation is not the exclusive preserve of the information profession”. It sees a continuing need for an information-specialist profession, but as part of an *information continuum* or extended ‘knowledge and information specialist community’, which includes everyone who is engaged in the process of managing information.²⁴

Similarly, CILIP’s report on the health sector asserts that “the web has made a major impact on the way in which information is stored, retrieved and managed and has irrevocably altered the relationships among the information professional, the user and the content.” It notes that some librarians have accordingly extended and redesigned their services, but others have lacked the organisational or personal capacity to do so, giving examples of contemporary roles and demands:

- *Teaching* – expansion and development of the role of librarians in user education, including classroom, point-of-need and online delivery,
- *Searching* – refinement and improvement of capability, particularly to support evidence-based practice,
- *Outreach* – increased proportion of work outside the library, often in multi-professional and cross-functional teams,
- *Knowledge* – involvement in managing explicit and tacit knowledge, and in mapping the flow of knowledge and learning in organisations,

- *Technology* – design and delivery of new electronic services, including content management systems, metadata and search functionality.⁹

Other authors confirm these trends, noting especially that librarians are often doing more complicated, difficult searches, with end-users doing their own basic searches. Some writers identify new or developed roles in *publishing*, including website and intranet management,²⁵ *advice*, particularly on copyright and intellectual property, which is more complicated in the Internet era;²⁶ and *tailored* or *value-added* information systems and services.²⁷

Several commentators mention the emergence of new *specialisms* or ‘microspecialties’ in information management – such as information architecture – as opportunities for professional development.^{28,29} CILIP also argues that information professionals in the health sector need to develop from generalists into specialists, possibly by training alongside other health professionals through placements, sabbaticals or attachments.⁹

Recruitment evidence

The recruitment sections of professional journals provide further evidence of new and evolving roles already available in library and information services. The ‘Positions Open’ pages of *American Libraries* and *College & Research Libraries News* (US) and the ‘Appointments’ pages of *Library + Information Gazette* (UK) reveal a steady stream of jobs with the words ‘electronic’ or ‘digital’ in their titles, including both operational and developmental roles. Common examples include Electronic Resources Librarian and Digital Services Coordinator. There are also higher-level positions (such as Director of Digital Collections and Director for Digital Library Services) and project roles (for example, Digital Library Project Manager and Digital Initiatives Developer), in addition to posts specialising in metadata creation and in numeric and spatial data services, including geographic information systems.

Posts with an educational, instructional, training or learning role also feature prominently, both as add-ons to other roles (for example Reference/Instructional Librarian, Training & Outreach Librarian) and as specialist roles of varying types (for example, Information Literacy Coordinator, Instructional Services Coordinator, Instructional Design Librarian, Instructional/Learning Technologist, Learning Adviser, Learning Support Librarian, Lifelong Learning Manager). The importance of this function is also shown by higher-level specialist roles, such as Head of Library Instruction, Director of Instructional Resources and Director of Educational Programs.

Another trend – more evident in the UK than in the US – is jobs with a focus on Knowledge Management (KM), such as Knowledge Manager, Knowledge Services Specialist, CRM & KM Content Manager, Know-How Administrator, Head of Library & Knowledge Services and Director of Knowledge & Information Services. KM has also given new meaning to old roles, exemplified in the role of Community Librarians attached to ‘communities-of-practice’.

Trend analysis

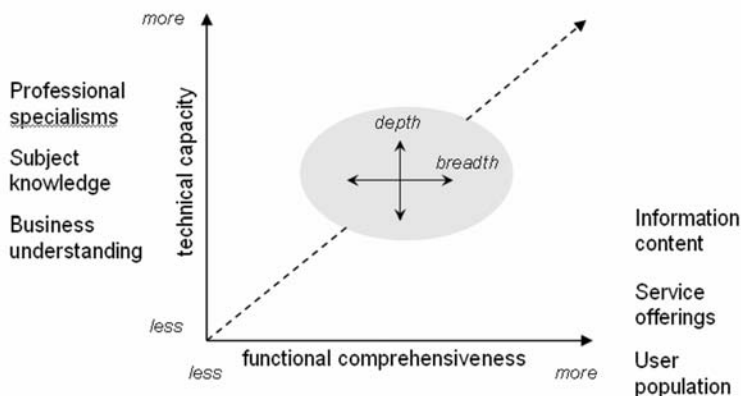
To understand the implications of such role developments, we need to go beyond the areas of development (such as teaching) and look at the nature of those developments. For example, in teaching, there is evidence of a *broadening* in scope, to cover computer skills and study skills, as well as subject-based information skills; an expansion of scale, with the role becoming part of more jobs, taking up more time and in some cases becoming a full-time specialism; and a *deepening* in content or complexity, with a requirement to integrate

information-related instruction with the wider context of an educational curriculum or research project.

There seem to be two forces or tensions at play here, reflecting more general trends. On the one hand, we see a broadening of coverage, evidenced in having to deal with a wider range of media and content (print and digital; published and in-house; data, information and knowledge) and in providing a wide array of information services and user support (for example, advice, guidance, instruction, searching and analysis), often to a diverse clientele. On the other, we see a development in the technical content of the work, requiring higher levels of specialism and in-depth knowledge of the subject field and its business or other context. This pattern confirms research at the University of Bristol on professional roles in general, which pointed to higher levels of work, greater business involvement and more networking within teams.³⁰

Figure 1 is an adaptation of a US model of the ‘cyberinfrastructure’ revolution.³¹ It asserts that the information profession is expected to deliver more functionality at higher capacity, in line with the increased technological capability at its disposal.

Figure 1 Broadening and deepening professional capability



This suggests a possible divergence in future information career paths, with *technical specialists* developing, managing and supporting the ‘infostructure’ (information infrastructure) and *functional specialists* aligning information with business and personal needs and applying information solutions to client problems. Research in the US has already suggested this scenario for Information Systems (IS) professionals.³² One question here is how this work will be divided between information specialists, IS/ICT professionals and other professionals with information-oriented backgrounds, interests and expertise: how will information-intensive work be spread across the ‘information continuum’?

Expanding skills – specialists and generalists

There have been several UK government-sponsored studies of skills needs and development priorities for the library and information sector over the past decade. The information services National Training Organisation (isNTO) carried out ‘skills foresight’

exercises in 2000-01 and 2002-03, investigating the views of employers from libraries, archives, records and information/knowledge management organisations. ('Skills' here covers the whole set of knowledge, skills and other attributes required for effective performance.) Both reports highlighted the wide range of skills required and ranked management and personal skills as slightly more important than 'job-related' (professional/technical) skills. Leadership and ICT competence were priority areas in both studies. Other development needs included customer care; "skills which relate to the social inclusion agenda, such as guidance and counselling, languages, cultural awareness"; managing change and "strategic and practical skills required...to become more outward looking and proactive".^{33, 34}

The consultancy firm TFPL has carried out three relevant studies, investigating skills requirements for working in the corporate sector and in knowledge management environments (sponsored by the British Library Research and Innovation Centre, the Library and Information Commission and the isNTO). Research in the corporate sector concentrated on requirements for first and second posts and identified four interpersonal 'soft' skills (team working, oral and written communication, listening/questioning and time management) as key needs, alongside professional skills in online searching and 'business focus' – understanding and maximising the value of information professionals to the business.³⁵

TFPL investigated the skills needed for knowledge management through a broadly-based international study in 1998-99 and through eight sector-specific UK case studies in 2000-01. These studies also identified business and organisational (contextual) understanding as a key requirement for KM roles, together with the personal attributes of ambition and risk-taking, and the professional capacity to shift from a service focus and support-function mindset to being a strategic player and equal partner in the organisation.

The first KM report categorised skills and competencies as 'core', 'survival' and 'enabling', while noting that the allocation of skills to categories might vary for different professions involved.³⁶ The second study confirmed earlier findings and also reinforced the isNTO message that library and information professionals need to become "more outward looking and proactive". This report also emphasised the need for professionals to blend 'specialised skills' with generic (transferable) skills and 'business critical competencies'. It provided another categorisation of skills into three groups with subdivisions:

- People skills
 - o personal attributes
 - o interpersonal and people management skills
- Business skills
 - o organisation specific
 - o transferable
- Expertise
 - o information related skills (content)
 - o information technology related skills.³⁷

These studies place the specialist skills of professionals in their broader context and stress the need for professionals to develop generic and context-related skills in order to exploit their specialist skills effectively. The reports do not provide much guidance on priorities for developing specialist skills, although computer literacy and technology-related competencies emerge as important and (sometimes) urgent areas.

Librarians as technologists

The need for library and information professionals to gain competence in ICT is a recurring theme in professional literature. According to Fourie, “IT skills are of course non-negotiable”,¹² but this prompts the question, what kind of IT skills? For specialist roles, such as the ‘digital librarian’ envisaged by Hastings and Tennant³⁸ and Sreenvisulu,³⁹ staff evidently need competencies in markup languages, imaging technologies, optical character recognition, programming, etc., but for other ‘hybrid library’ roles, the technical skills will surely reflect the nature of the particular role and its context. Thus Kwasik found that US serials librarians were increasingly expected to be familiar with metadata standards and markup languages;²³ but for many public librarians the technical requirement may be at a relatively basic level, such as skills in using standard office tools, searching databases and the Internet.

Thorhaug comments on the challenge of upskilling an ageing public library workforce in Denmark. He sees two further requirements beyond just understanding and handling the new technology: ability to handle the changing needs of users, by providing ICT training or consultancy-like services, and ability to handle strategic development, including cultural change.⁴⁰ Other authors recognise that technology-related requirements extend beyond technical skills to contextual understanding: Battin specifies as important proficiencies an understanding of the capacities of digital technologies and of the way that different disciplines use them⁴¹ and Johnson suggests that rather than teaching specific systems, professional education should develop transferable skills in students by:

- giving them an understanding of the underlying principles,
- accustoming them to using manuals for self-instruction when introducing new systems,
- demonstrating how systems might be applied in professional practice,
- providing a level of technical understanding, sufficient to discuss systems confidently with vendors and technical experts,
- enabling them to recognise what the technology is capable of doing, sufficient to plan and manage changes in information provision.⁴

Librarians as teachers

As indicated earlier, training/teaching is another key area for competency development. The CILIP report on the health sector identified teaching as the most expanded and changed activity,⁹ confirming Scherrer’s findings in the US.⁴² Librarians in the education sector have a long tradition of providing user education/bibliographic instruction, but educational and technological changes have broadened this role to embrace information literacy in the digital environment and extended the modes of delivery to include interactive online tutorials, such as the Internet Detective,⁴³ as well as point-of-need instruction and timetabled classes. According to Braun, the change has been equally profound for many public libraries, who have often moved from doing no training at all to providing both on-the-spot and classroom-based training on a wide range of technology-related topics, including teaching the basics of computing (using a mouse, word processing, etc).²¹

Many practitioners have argued for a step-change in competency for librarians to fulfil teaching roles properly. Barrett calls for a new specialist certificate in school librarianship to cover topics such as pedagogical theory, teaching and learning styles, and the national curriculum.⁴⁴ Peacock argues that “the knowledge and skills required to formulate and deliver effective teaching and learning experiences must take an *essential*, rather than desirable, place in the librarian’s portfolio”. She itemises the range of pedagogical, strategic (interpersonal and organisational) and information-related skills and competencies needed to move from

‘librarians who teach’ to educators and learning facilitators.⁴⁵ Bell and Shank use the term ‘blended librarian’ to make the case for an academic librarian who “combines the traditional skill set of librarianship with the information technologist’s hardware/software skills, and the instructional or educational designer’s ability to apply technology appropriately in the teaching-learning process”.¹⁷

Reframing competence – statements and models

The maintenance of competence through Continuing Professional Development (CPD) is one of the defining characteristics of a professional person and CPD has become even more important in the fast-moving environment of the 21st century. Many professional bodies now operate mandatory or voluntary schemes to validate CPD of their members. CILIP introduced a voluntary revalidation scheme in 2005, which may eventually become mandatory.⁴⁶ In this context, professionals need to be more conscious and systematic in managing and appraising their own development, as well as in facilitating the development of the staff they manage.

At the same time, many governments have recognised the contribution of skills development to national competitiveness in a global economy and have identified sets of key skills or competencies, which the education system must develop to prepare students for employment.^{47,48,49} The focus is now moving beyond skills for employment to the concept of *employability*, that is “the capability to move self-sufficiently within the labour market to realise potential through sustainable employment”.⁵⁰ In the UK, this has led to mandatory Personal Development Planning (PDP) for students in higher education, which the Quality Assurance Agency (QAA) defines as “a structured and supported process undertaken by an individual to reflect upon their own learning, performance and/or achievement and to plan for their personal, educational and career development”.⁵¹

Thus both students and practitioners of library and information science (LIS) need to manage, monitor and reflect on their personal professional development. The development needs of these two groups obviously vary, particularly in terms of the level of skills and depth of knowledge required, but they should be working within a common overarching model of professional competence and, ideally, a competency model that will support them from initial professional education not only to their first professional post and full membership of their professional body, but also through CPD to higher-level posts, revalidation and senior grades of professional membership.

To support CPD effectively, such a model needs to be *holistic* in scope, representing the full range of skill and competency areas identified in studies of workforce development needs. It also needs to be *hospitable* in nature, taking account of the fluid qualities of information work and its boundaries with other professions. The next question is whether any existing competency models, frameworks or documents meet these needs or could be adapted to do so? The following sections consider a sample of possible candidates from the UK and US.

UK frameworks

Possible UK candidates include the QAA ‘subject benchmark statement’ for LIS education, the CILIP accreditation instrument for LIS courses and the PDP tool developed by the Learning and Teaching Support Network for Information and Computer Sciences (LTSN-ICS). The QAA statement contains two main sections on *subject* knowledge, skills and understanding (20 items) and *general* transferable skills (33 items).⁵² It covers the specialist knowledge areas effectively, but there is significant overlap between items here and those in the general section, which gives a confusing picture. Also, the general section needs further

development to cover the full range of management and business competencies required in the workplace.

The CILIP instrument has five main categories, of which four are information-related, with the fifth covering management and transferable skills. The allocation of both information-related and management-related items to categories is somewhat arbitrary. For example, some management competencies (such as strategic planning and marketing) are listed under Information Management and Organisational Context, instead of being in the final section, thus presenting these competencies as specialist information capabilities rather than generic ones.⁵³

The PDP tool is aimed at students, graduates and “professionals within the ILS industry who wish to develop and maintain a Continuing Professional Development (CPD) record”. It covers 53 skills under 14 headings, grouped as three skill sets – *key* skills, *personal* skills and *professional* skills. Here again the relationship of items to headings is often questionable: the distinction between ‘key’ and ‘personal’ skills seems artificial; there is overlap between the heading Organisational Management in ‘personal skills’ and the heading Information Service and Organisations Management in ‘professional skills’; and the ‘professional skills’ include a mix of information-related and general management competences, with project management arbitrarily listed under Information Systems, instead of being seen as a generic ability.

This tool provides four ‘statements of competence’ for each skill, intended to correspond respectively with the start, duration and completion of the LIS degree and progression towards chartered membership of CILIP. However, many of the defined levels of competence depict stages of development that do not seem to reflect the real world. Moreover, offering only *four* levels gives an unduly limited picture of professional competence and reduces the value of the tool for CPD.⁵⁴ Several models from other domains provide more levels, notably the Skills Framework for the Information Age (SFIA) promoted by the e-skills UK national training organisation, which defines *seven* levels of responsibility, progressing from basic entry to senior management, and covers both specialist and non-specialist jobs for the IS/ICT field.⁵⁵

US frameworks

Another approach to articulating professional competence is by the development of formal statements of competencies required for particular professional roles. This practice is long established in the US, notable examples including the *Competencies for Librarians Serving Youth* (first published in 1981) and the *Competencies for Librarians Serving Children in Public Libraries*, in addition to the widely-cited SLA *Competencies for Information Professionals of the 21st Century*. Such documents have a role in facilitating CPD, supporting recruitment and promoting the profession.

The youth and children’s librarianship statements from the American Library Association each list around 60 competencies arranged under seven headings. Although they focus specifically on youth library work, they provide a more coherent view of professional competence than the UK documents examined, with more effective differentiation of specialist and generic competencies, but their discursive style does not enable rapid assimilation of the full spectrum of attributes covered.^{56,57}

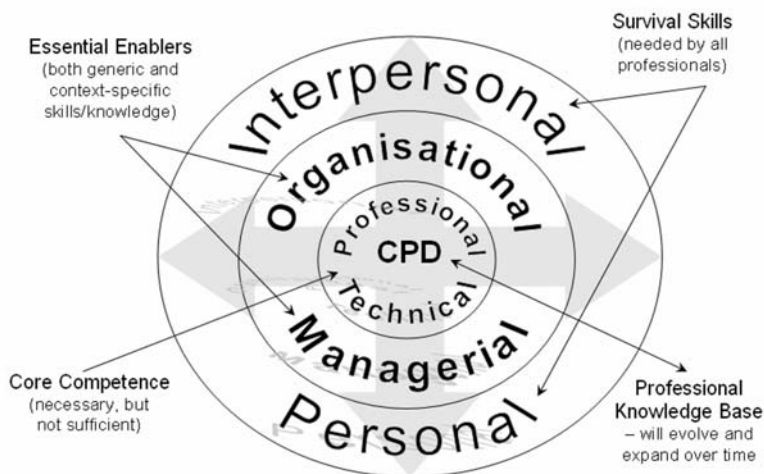
The SLA *Competencies* provide a case study in the evolution of professional thinking about what constitutes and defines the library and information profession, and how best to present its essential and unique attributes. The original version presents specialist information-related and generic management abilities together as Professional Competencies, but the latest edition has a clearer breakdown under four headings: Managing Information

Organizations, Managing Information Resources, Managing Information Services and Applying Information Tools and Technologies. However, two other changes seem less satisfactory: the omission of “specialized subject knowledge appropriate to the business of the organization or client” and the relegation of instruction for service users/education in information literacy from a competency to an example (‘applied scenario’) in the revised version.^{58, 59}

New models

This brief review has identified a failure, particularly in UK frameworks, to differentiate between specialist information-related and transferable generic skill sets. US competency documents provide a more coherent view of professional competence, but their layout and length make it hard to gain a quick overview of the field. Figure 2 presents an integrated high-level model of professional competence for the library and information field, which reflects published findings on development needs and draws particularly on the TFPL studies of knowledge management environments.

Figure 2 Differentiating and contextualising professional competence

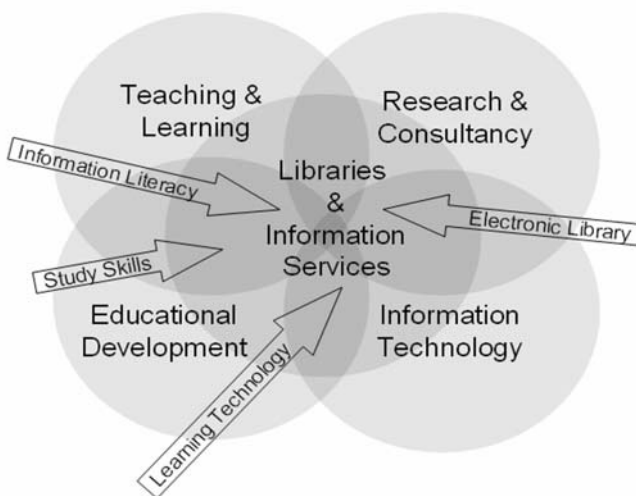


This model aims to show that all professionals need a complex mix of specialist, generic and contextual competencies. The concentric circles show how specialists need to surround and augment their core Professional/Technical competencies with essential business-related and supporting (inter)personal competencies for effective performance. The middle circle deals with the need for ‘business acumen’. It includes both generic transferable Managerial competencies (such as strategic planning and marketing) and context-specific Organisational competencies, related to the particular company, institution or community where the professional works (understanding of its structure, culture, subject field, etc.). The outer circle covers Personal attributes and skills (such as time management) as well as Interpersonal skills (such as team work).

Research cited above suggests that professionals need to develop and promote their understanding of the specific business context in which they work, as well as their generic abilities, to achieve success in evolving and fluid organisational structures. Their professional/technical knowledge base will evolve and expand to reflect both the development of the profession in its environment and the development of individuals in their careers. A key issue here is how to deal with the blurring and overlap of boundaries between different professions (such as librarians and teachers). The Bristol work cited earlier noted that in addition to professional, business and personal skills, professionals are increasingly expected to have *cross-functional skills*, to enable them not only “to negotiate and communicate with other professionals”, but also “to make decisions outside the immediate confines of their original specialism”.³⁰

One way of representing this would be to insert another circle in the model above between the core and enabling competencies to cover Cross-Functional Capabilities. However, this would make the diagram complicated and may still not capture the complexities of the situation at a sufficiently detailed level to be useful. Figure 3 is an expanded view of the core competence of library and information work, giving an academic library perspective on the blurring of boundaries with other areas.

Figure 3 Evolving and overlapping professional specialisms



This model shows how library and information competencies are increasingly overlapping with competencies in teaching and learning, research and consultancy, information technology and educational development and also indicates emergent boundary-spanning specialisms. Its main aim is to help make sense of the field, but it also has a potential role in identifying professional development needs and partners.

Conclusion

Technological, organisational and educational changes are significantly affecting the library and information profession. There is a mixed picture of role development, with

technology incorporated into existing functions, significantly complicating some jobs and also generating new specialisms. The integration of information into business activities is blurring the traditional boundaries between information, IS/ICT and other professionals, including teachers. Demands to broaden and deepen capacity suggest a divergent model of roles with technically specialised and business oriented dimensions.

The skill set for the network world includes strategic business and soft personal skills in addition to specialist information skills. Professional competence is multi-faceted, requiring generic and context-specific knowledge and understanding related to particular roles. Competence in ICT is a core requirement, but needs to include user knowledge and strategic awareness as well as practical skills. Staff who teach need practical skills, theoretical knowledge and contextual awareness to fulfil this role.

Many existing professional competency frameworks fail to differentiate specialist and generic skill sets and do not articulate the range and nuances of competencies needed. High-level models can help to identify, develop and promote professional capabilities in a changing situation. More work is needed to:

- explore the convergence and divergence of roles in information management,
- articulate fully our core competencies in a technologically rich environment,
- investigate and define different levels of information-related competencies for information-specialist and other information-intensive activities.

References

¹ Castells, M. *The Internet Galaxy: Reflections on the Internet, Business and Society*. Oxford: Oxford University Press, 2001.

² Ward, S. Information professionals for the next millennium. *Journal of Information Science* 1999, 25 (4), 239-247.

³ Lynch, C. From automation to transformation: forty years of libraries and information technology in higher education. *EDUCAUSE Review* 2000, 35 (1) 60-68. URL <<http://www.educause.edu/pub/er/erm00/pp060068.pdf>>

⁴ Johnson, I.M. Catching the tide: environmental pressures for an emphasis on management in the library and information sciences curriculum. *Library Management* 1999, 20 (6), 317-331.

⁵ Hirshon, A. *Integrating Computing and Library Services*. Boulder: CAUSE, 1998. CAUSE Professional Paper Series, #18

⁶ Field, C. Theory and practice: reflections on convergence in United Kingdom universities. *Liber Quarterly* 2001, 11 (3), 267-289.

⁷ Sayers, R. Open relationships, de-facto marriages, or shotgun weddings?: the convergence and integration of libraries and computing/information technology services within Australian universities. *Australian Library Journal*, 2001, 50 (1), 53-71. URL <<http://archive.alia.org.au/alj/50.1/full.text/open.relationships.html>>

⁸ Coleman, A. Interdisciplinarity: the road ahead for education in digital libraries. *D-Lib Magazine* 2002, 8 (7/8). URL <<http://www.dlib.org/dlib/july02/coleman07.html>>

⁹ Chartered Institute of Library and Information Professionals. *Future proofing the profession: the report of the Health Executive Advisory Group to the Executive Board of CILIP*. 2004. URL <<http://www.cilip.org.uk/professionalguidance/health/heagfinalreport.htm>>

¹⁰ Levy, P., Ford, N., Foster, J., Madden, A., Miller, D., Nunes, M.B., McPherson, M. & Webber, S. Educational informatics: an emerging research agenda. *Journal of Information Science* 2003, 29 (4), 298-310.

¹¹ McKnight, S. Managing cultural change: the challenge of merging library services, curriculum development and academic professional development. *IFLA Journal* 2002, 28 (5/6) 266-72. URL <<http://www.ifla.org/Viflaj/art280506.pdf>>

- ¹² Fourie, I. Librarians and the claiming of new roles: how can we try to make a difference. *Aslib Proceedings* 2004, 56 (1), 62-74.
- ¹³ Cheng, G. The shifting information landscape: re-inventing the wheel or a whole new frontier for librarians. *New Library World* 2001, 102, 1160/1161, 26-33.
- ¹⁴ Homann, B. German libraries at the starting line for the new task of teaching information literacy. *Library Review* 2003, 52 (7), 310-318.
- ¹⁵ Chochrek, D. Market the value of your competitive intelligence: an added role for the information center. *Information Outlook* 2000, 4 (2), 32-35.
- ¹⁶ Choo, C.W. Working with knowledge: how information professionals help organisations manage what they know. *Library Management* 2000, 21 (8), 395-403.
- ¹⁷ Bell, S.J. & Shank, J. The blended librarian: a blueprint for redefining the teaching and learning role of academic librarians. *College & Research Libraries News* 2004, 65 (7), 372-375.
- ¹⁸ MacColl, J. Virtuous learning environments: the library and the VLE. *Program* 2001, 35 (3), 227-239.
- ¹⁹ Ashworth, S., Mackie, M. & Nixon, W.G. The DAEDALUS project, developing institutional repositories at Glasgow University: the story so far. *Library Review* 2004, 53 (5), 259-264.
- ²⁰ Jones e-global library. *The Role of Librarians in the Digital Age* [n.d.] URL <http://www.jonesknowledge.com/eglobal/ala_survey_download.html>
- ²¹ Braun, L.W. New roles: a librarian by any name. *Library Journal* 2002, 127 (2), 46-49.
- ²² Sharp, K. Internet librarianship: traditional roles in a new environment. *IFLA Journal* 2001, 27 (2), 78-81. URL <<http://www.ifla.org/V/iflaj/art2702.pdf>>
- ²³ Kwasik, H. Qualifications for a serials librarian in an electronic environment. *Serials Review* 2002, 28 (1), 33-37.
- ²⁴ Chartered Institute of Library and Information Professionals. *CILIP in the Knowledge Economy: A Leadership Strategy: The Report of the Competitiveness and the Knowledge Based Economy Executive Advisory Group to CILIP*. London: CILIP, 2002. URL <<http://www.cilip.org.uk/professionalguidance/knowledgeeconomy>>
- ²⁵ Griffiths, P. *Managing your Internet and Intranet Services*. London: Library Association Publishing, 2000.
- ²⁶ Wherry, T.L. *The Librarian's Guide to Intellectual Property in the Digital Age*. Chicago: American Library Association, 2002.
- ²⁷ Kuhlthau, C.C. & Tama, S.L. Information search process of lawyers: a call for 'just for me' information services. *Journal of Documentation* 2001, 57 (1), 25-43.
- ²⁸ Krauss-Leichert, U. The multimedia sector: new fields of activity for information specialists. *IFLA Journal* 2001, 27 (3), 163-70. URL <<http://www.ifla.org/V/iflaj/art2703.pdf>>
- ²⁹ Lachance, J.R. Beyond competencies: the journal from relevance to mission-critical. In: *Online Information 2004 Conference Proceedings*, 2004, 131-36. URL <http://www.online-information.co.uk/2004proceedings/thursam/lachance_j.pdf>
- ³⁰ Watkins, J., Drury, L. & Preddy, D. *From Evolution to Revolution: The Pressures on Professional Life in the 1990s*. Bristol: University of Bristol, 1992.
- ³¹ United States. National Science Foundation. Blue-Ribbon Advisory Panel on Cyberinfrastructure. *Revolutionizing Science and Engineering Through Cyberinfrastructure*. Arlington, Va.: NSF, 2003. URL <http://www.communitytechnology.org/nsf_ci_report/>
- ³² Lee, D.M.S., Trauth, E.M. & Frawell, D. Critical skills and knowledge requirements of IS professionals: a joint academic/industry investigation. *MIS Quarterly* 1995, 19 (3), 313-340.

- ³³ information services National Training Organisation. *Skills foresight in the information services sector 2000-2007*. Bradford: isNTO, 2001.
- ³⁴ information services National Training Organisation. *Skills foresight in the information services sector 2003-2009*. Bradford: isNTO, 2003.
- ³⁵ Stenson, A., Raddon, R. & Abell, A. *Skills and Competencies in the Corporate Sector*. London: British Library Research and Innovation Centre, 1999. British Library Research and Innovation Report 162.
- ³⁶ TFPL Ltd. *Skills for Knowledge Management: Building a Knowledge Economy: A Report . . . Based on Research Jointly Funded by TFPL and the Library and Information Commission*. London: TFPL, 1999.
- ³⁷ Skelton, V. & Abell, A. *Developing Skills for the Information Services Workforce in the Knowledge Economy: A Report on the Outcomes of Eight Scenario Planning Workshops, Commissioned by the Information Services National Training Organisation*. London: TFPL Ltd., 2001. Library and Information Commission Research Report 122.
- ³⁸ Hastings, K. & Tennant, R. How to build a digital librarian. *D-Lib Magazine* 1996, 2 (11). URL <<http://www.dlib.org/dlib/november96/ucb11hastings.html>>
- ³⁹ Sreenivasulu, V. The role of a digital librarian in the management of digital information systems. *The Electronic Library* 2000, 18 (1), 12-20.
- ⁴⁰ Thorhauge, J. New demands: old skills. *World Library and Information Congress: 70th IFLA General Conference and Council*, 2004. URL <<http://www.ifla.org/IV/ifla70/papers/053e-Thorhauge.pdf>>
- ⁴¹ Battin, P.M. Librarianship in the twenty-first century. *Syracuse University Library Associates Courier* 1998-2001, XXXIII, 43-61.
- ⁴² Scherrer, C.S. Reference librarians' perceptions of the issues they face as academic health information professionals. *Journal of the Medical Library Association* 2004, 92 (2), 226-232.
- ⁴³ Internet Detective. URL <<http://www.sosig.ac.uk/desire/internet-detective.html>>
- ⁴⁴ Barrett, L. Skills provision and development for school librarians. In: information services National Training Organisation. *Workforce Development Plan*. Bradford: isNTO, 2002, 5.
- ⁴⁵ Peacock, J. Teaching skills for teaching librarians: postcards from the edge of the educational paradigm. *Australian Academic & Research Libraries* 2001, 32 (1), 26-42. URL <<http://www.alia.org.au/publishing/aarl/32.1/full.text/jpeacock.html>>
- ⁴⁶ Chartered Institute of Library and Information Professionals. *Revalidation Scheme Handbook*. London: CILIP, 2004. URL <<http://www.cilip.org.uk/qualificationschartership/FrameworkofQualifications/revalidation>>
- ⁴⁷ United States. Department of Labor. Employment & Training Administration. Secretary's Commission on Achieving Necessary Skills. *What Work Requires of Schools: A SCANS Report for America 2000*. Washington, DC: US Department of Labor, 1991. URL <<http://wdr.doleta.gov/SCANS/whatwork>>
- ⁴⁸ *Key Competencies: Report to the Committee to Advise the AEC and Ministers of Vocational Education, Employment and Training on Employment Related Key Competencies*. Canberra: Australian Education Council, 1992 (Mayer report). URL <http://www.detya.gov.au/nbeet/publications/pdf/92_36.pdf>
- ⁴⁹ Dearing, R. *Review of Qualifications for 16-19 Year Olds*. Hayes: School Curriculum and Assessment Authority, 1996.
- ⁵⁰ Hillage, J. & Pollard, E. *Employability: Developing a Framework for Policy Analysis*. Brighton: Institute for Employment Studies, 1998. DfEE Research Brief No. 85 [WWW document]. URL <<http://www.employment-studies.co.uk/summary/summary.php?id=emplblty>>

- ⁵¹ Quality Assurance Agency for Higher Education. *Policy Statement on a Progress File for Higher Education*. Gloucester: QAA, 2000. URL <<http://www.qaa.ac.uk/cmntwork/progfilehe/guidelines/policystatement/contents.htm>>
- ⁵² Quality Assurance Agency for Higher Education. *Academic Standards – Librarianship and Information Management*. Gloucester: QAA, 2000. Subject Benchmark Statements. URL <<http://www.qaa.ac.uk/cmntwork/benchmark/librarianship.html>>
- ⁵³ Chartered Institute of Library and Information Professionals. *Accreditation Instrument: Procedures for the Accreditation of Courses*. rev. ed. CILIP, 2002 [Unpublished document].
- ⁵⁴ Beckett, I. & Brine, A., (comps.) *Recording Skills Development for Information and Library Science: Developed from the Recording Academic, Professional and Individual Development (RAPID) Progress File at Loughborough University*. Loughborough: LTSN-ICS (Information Science), 2002. URL <<http://www.ics.ltsn.ac.uk/ILS/RAPIDskillsrecord.pdf>>
- ⁵⁵ *Introducing SFIA*. London: SFIA Foundation, [n.d.]. See also the SFIA Foundation website. URL <<http://www.sfia.org.uk/>>
- ⁵⁶ American Library Association. Young Adult Library Services Association. *Young Adults Deserve the Best: Competencies for Librarians Serving Youth*. Chicago: ALA, 2003. URL <<http://www.ala.org/ala/yalsa/professionaldev/youngadultsdeserve.htm>>
- ⁵⁷ American Library Association. Association for Library Service to Children. *Competencies for Librarians Serving Children in Public Libraries*. rev. ed. Chicago: ALA, 1999. URL <<http://ala.org/ala/alsc/alscresources/forlibrarians/professionaldev/competencies...>>
- ⁵⁸ Special Libraries Association. Special Committee on Competencies for Special Librarians. *Competencies for Special Librarians of the 21st century*. Washington: SLA, 1997. URL <<http://www.sla.org/content/learn/comp2003/97comp.cfm>>
- ⁵⁹ Special Libraries Association. Special Committee on Competencies for Special Librarians. *Competencies for Information Professionals of the 21st Century*. rev. ed. Washington: SLA, 2003. URL <<http://www.sla.org/content/learn/comp2003/index.cfm>>

DIFFERENT APPROACHES – COMMON CONCLUSIONS: THE SKILLS DEBATE OF THE 21st CENTURY

Biddy Fisher

Sheffield Hallam University
Sheffield, UK
b.m.fisher@shu.ac.uk

Dr Gillian Hallam

Queensland University of Technology
Brisbane, Australia
g.hallam@qut.edu.au

Helen Partridge

Queensland University of Technology
Brisbane, Australia
h.partridge@qut.edu.au

Abstract

This paper presents the findings and analysis of research undertaken in both the United Kingdom and Australia to identify the range of knowledge and skills required by library and information professional to meet the challenges of the 21st century. In the United Kingdom, the Chartered Institute for Library and Information Professionals has developed a new qualifications framework and revised the body of professional knowledge for information professionals. In Australia, the research has focused on the two complementary and intertwined strands of discipline knowledge and generic capabilities. The issues that arise from the two projects are relevant to all sectors of the library and information profession, to stimulate discussion about possible strategies for workforce planning. Career-long learning has become an imperative for information professionals, with the research findings highlighting the importance of a collaborative approach to professional development to involve the individual, educators, employers and professional associations.

Introduction

“It takes an extraordinary worker to become a successful professional librarian in the 21st century.” (Lovato-Gassman)¹

The dynamic nature of library and information work has resulted in fundamental changes to the roles and responsibilities of librarians. This has in turn led to considerable discussion about the spectrum of skills and knowledge required by the new information professional. Salter argues that we, as a profession, must not be afraid to ask “hard deeply intense, if not disturbing questions, about our profession in order to fully understand and formulate our new image”.²

There has been considerable interest in endeavouring to determine what the cornerstone of library and information services (LIS) currently is, or might become in the future. In both the United Kingdom (UK) and Australia, there is a keen awareness of the need for library and information professionals (LIPs) to have opportunities to acquire a full range of knowledge and skills to meet the challenges of known and perceived changes in modern professional practice. Two research projects have been undertaken, one in Australia to

identify the areas of discipline knowledge and the key personal attributes that are required by successful LIS professionals; the other in the UK to identify the needs of LIS employers in the recruitment and retention of successful staff. This paper reviews the two projects to note that, despite the distinctly different research approaches, the findings are remarkably common. It is believed that the issues that arise from the projects are relevant to all sectors of the library and information profession, providing a basis to prepare strategies for workplace planning.

Accordingly, these two projects dovetail to consider the educational and continuing professional development needs of the library and information professional that are integral to his or her career-long growth in a dynamic and vibrant industry. The isolationist approach cannot succeed. It is essential that the LIS profession finds its strength through the cooperation and collaboration of all stakeholders, including the individual, educators, employers and, linking all three, the professional association.

The library and information professional in the twenty first century

The continual changes in the work environment have raised considerable debate amongst employers, amongst LIS educators and within the professional associations about the alignment between the academic curriculum and the needs of employers. Huckle, speaking for the Chartered Institute for Library and Information Profession (CILIP) in the UK, indicated the impact of curriculum change had raised specific concerns for the professional body: "Over the last few years the current accreditation procedures and the Body of Professional Knowledge have not kept pace with the development and of the range and nature of programmes at both undergraduate and postgraduate level in our dynamic and rapidly changing discipline".³ As LIS educators, Brine and Feather have noted, "so far as the academic curriculum is concerned, there is probably general agreement about the broad scope of knowledge and understanding which the new entrant to the profession needs to acquire. There is rather less clarity and consensus about the skills which are needed if s/he is to function effectively".⁴

This view is supported by the literature reporting on the situation in all corners of the world, including by Irwin;⁵ Maceviciute;⁶ Koehler;⁷ Middleton;⁸ Myburgh;⁹ Raju;¹⁰ and Tedd.¹¹ LIS educators propose a wide range of competencies, skills, knowledge areas, topics or modules for their courses. Terms include social informatics, knowledge management, information management, information economics, information resources development, IT applications, information systems, networking, Internet, virtual library, management of information organisations, human resource development, information organisation, information retrieval, collection and access management, professional ethics, and the list goes on. The role of skills in information technology comes to the fore in the analysis. The identification and definition of the key skills and knowledge, which are specific to the newly emerging modern day library and information professional have therefore become a critically important issue for the profession as a whole.

In the UK, the merger of the Library Association and the Institute of Information Scientists in April 2002 to form CILIP provided the impetus for a research project to develop an agreed framework of skills that would encompass both the existing and perceived broader needs of employers of LIPs, in order to accommodate the changes in modern professional practice. This research project was undertaken through an analysis of employment advertisements placed in the *Guardian*, the *Times Higher Education Supplement* and the CILIP Appointment pages. Supported by a review of the professional literature, interviews were conducted to identify the specific needs of employers at the beginning of the twenty first century.

Around the same time, in Australia, the Queensland University of Technology (QUT) funded a research project that aimed to identify and examine the skills and knowledge essential for the successful library and information professional in the twenty-first century. This project specifically focused on the two complementary and intertwined strands of discipline knowledge and personal attributes, effectively establishing a dialogue between employers, educators and the Australian Library & Information Association (ALIA). While these two research projects differed in their approach, one from the employer angle and the other from the education angle, the conclusions reached were remarkably similar.

Review of the research in Australia

The QUT research project was completed in two stages, to consider the dual dimensions of discipline knowledge and personal attributes, or generic capabilities. Establishing a clear and precise definition of *discipline knowledge* and *generic capabilities* was an important part of the research project. In discussing the curriculum developments in Dutch LIS schools, Roggema-van Heusden refers to ‘specific expertise’ which is defined as the “necessary knowledge and experience and insight relevant to the invariable aspects of the (professional) problem”.¹² Many synonyms can be used to refer to this core set of skills, such as ‘subject-specific knowledge’, ‘content knowledge’ or ‘subject matter expertise’. For the purpose of maintaining consistency within this paper the term *discipline knowledge* is used to refer to these skills and abilities.

In recent years interest has grown within the higher education sector to help students develop life skills that can allow them to “function across different cognitive domains or subject areas and across a variety of social, and in particular employment situations”.¹³ Skills such as problem solving, critical thinking, effective communication, teamwork and ethical thinking are all examples of the life skills in question. Together these life skills form the core set of workplace skills and abilities desirable in graduating students and new employees. They complement the discipline specific skills and professional knowledge acquired by students through their university study. Within the literature many synonyms have been used to refer to this core set of skills. Such synonyms include; transferable skills,¹⁴ key competencies,¹⁵ generic skills,¹⁶ and graduate attributes.¹⁷ The term *generic capabilities* is used in this paper to refer to these skills and abilities.

The research approaches used in both stages of the QUT project included an extensive review of the current literature and a series of focus groups. A detailed discussion of the methodologies is presented in an earlier paper.¹⁸

The data obtained from the literature review were collated and summarised into initial ‘lists’ of skills and knowledge within the two distinct areas of discipline knowledge and generic capabilities. The terminology and definitions (i.e. the names of the 14 fields of discipline knowledge and the 10 generic capabilities with the associated descriptions) used in the lists were extracted from the literature reviewed. These preliminary research findings (Tables 1 and 2) were presented to a series of focus groups for discussion, with participants drawn from public, State, academic, government and special libraries, LIS education and LIS employment services, from different areas of South East Queensland. Participants represented a broad spectrum of both age and professional experience. To counter the limitations of the research resulting from the local geographic distribution of focus group participants, a subsequent survey was distributed to potential respondents across Australia.

Table 1 Discipline knowledge for the library and information professional of the 21st century

	Fields of discipline knowledge	Scope of field
1	Information and society	The role of information in society as a social, cultural and economic motor.
2	Ethics & legal responsibility	The study of : • ethical considerations that arise in the storage, processing, retrieval and use of information and information systems • standards of conduct for information professionals in the performance of their duties • legal issues that apply in relation to the storage, processing, retrieval and use of information and information systems.
3	Management	The study of management theories and the basic principles of management as they apply to libraries and information centres.
4	Information organisation	The study of the description and organisation of information resources to facilitate information access and retrieval.
5	Information services	The study of the design and delivery of relevant and efficient information services.
6	Collection management & development	The study of the activities associated with the development and management of, and access to, library and information resources.
7	Information resources and retrieval	The study of the theory and practice of reference and information services.
8	Information literacy instruction	The study of information use theory, contemporary teaching theory and instructional design.
9	Information management/ Knowledge management	The study of: • management principles to the acquisition, organisation, control, dissemination and use of information relevant to the effective operation of organisations. • knowledge within the context of an organisation, including information and knowledge creation, codification, sharing and learning.
10	Information systems for library and information professionals	The study of the application of computer-based systems in libraries and information centres.
11	Web content management	The study of the design and management of Internet and intranet sites.
12	Career planning skills	An understanding of the skills essential for successful career planning including employment seeking strategies and career planning.
13	Records management and archives	The study of the application of management principles to the control of an organisation's records. The study of the management and control of records that are judged to have permanent value.
14	Research in LIS	The generation of knowledge through the ability to systematically gather and analyse data to advance library and information science theory and its application to the provision of information services.

Table 2 Generic capabilities for the library and information professional of the 21st century

	Generic Capability	Description
1	Information literacy	Information literacy is the ability to recognize when information is needed and being able to locate, evaluate and use effectively the needed information.
2	Lifelong learning	Lifelong learning is the ability to learn how to learn in all facets of life (i.e. professional, personal and educational).
3	Teamwork	Teamwork is the ability to work effectively with others in a group with the view to achieving defined goals. Two distinct roles necessary for teamwork are the team member and the team leader. A team member makes a productive contribution to the collaborative effort of the group by participating in the pursuit of group goals under the guidance of the team leader. The team leader makes a productive contribution to the collaborative efforts of the group by providing guidance to ensure desired goals are met.
4	Communication	Communication is the ability to exchange feelings, ideas and information with others in an appropriate manner. Communication consists of the two key aspects of oral and written skills. Oral communication involves using the human voice to effectively articulate a message to an intended audience. Written communication involves using text or graphics to effectively transmit a message to an intended audience.
5	Ethics and social responsibility	Ethics and social responsibility relate to an awareness of the need for and commitment to the maintenance of high professional standards and social justice.
6	Project management	Project management is the ability to plan and to achieve desired goals to meet specified standards and criteria or to adapt to a changing environment through the effective co-ordination of available resources.
7	Critical thinking	Critical thinking is the ability to reach conclusions through reflection and evaluation by applying independent thought and informed judgement.
8	Problem solving	Problem solving is the ability to find effective solutions to problems through creative reasoning.
9	Business acumen	Business acumen is the ability to understand and contribute to the corporate culture and the business environment of the parent organization.
10	Self management	Self management is the willingness and ability to develop a mature and balanced understanding of self. The ability to apply reflective practice to support ongoing personal and professional growth will enhance individual strengths and minimise weaknesses.

The table of professional information skills and generic capabilities presented in Table 3 is based on the analysis of job descriptions, interviews, research reports and professional reading that constituted the research work undertaken by CILIP in the UK.

Table 3 Summary of skills for the 21st century (CILIP)

Professional Information skills	Generic skills
Knowledge management Information architecture ICT skills Technical (traditional) professional skills	Project management **Planning and evaluation People management Research skills Bids and proposals
Subject expertise Collection management Collection description Technical (traditional) professional skills	Critical skills Thinking **Planning and evaluation Analysis Problem solving Research
Information technology Design Application Systems User support (problem solving)	Leadership General management Communication skills Strategic management People skills Financial skills
Service development User information Surveys Service impact analysis Planning and evaluation** Promotion and marketing*	*Promotion and marketing Design appreciation Presentation skills Multi-professional appreciation

While the areas of professional skills are grouped and presented in a different way, there is significant overlap between the findings from the two research projects.

The ‘genetic makeup’ of individual professionals

Extrapolating from the work by Watson and Crick in the field of genetics, it is proposed that the two domains of generic capabilities and discipline knowledge are, like the strands within the double helix, intertwined and complementary. Together these strands form the “unique patterns of DNA”¹⁹ that determine the specific characteristics and qualities of the library and information professional.

DNA contains the coded instructions, or genes, that are needed to construct the human body. While the genes of each human being are very similar, there are also some differences or variations that ensure that we are not all identical. It is estimated that 99.9% of our genes are identical to the genes in other human beings, but the remaining 0.1% results in the distinctions and differences that, when combined with environmental factors, make us all individuals. So, while the DNA of the library and information professional is composed of the intertwined strands of discipline knowledge and generic capabilities, the field of application for the knowledge and skills is broad ranging. The profession needs the variations of dominant and recessive genes, plus the 0.1% distinctiveness, to provide the individual traits of the profession. While there are some similarities between the role of rural public librarian, for example, and the role of the corporate information manager, it is the variations in the ‘genetic makeup’ of the information professionals that produces the richness and diversity. It could be inferred that the ‘genetic makeup’ of individual professionals “depends on their formal qualifications, work experience, professional development, and the role they perform”.²⁰

What skills are in demand?

Some of the research work undertaken in the United Kingdom specifically views the knowledge and skills of library and information professionals through the lens of the employer. New professional imperatives demand that opportunities are created to acquire a full range of professional skills and to promote the role of the library and information profession in the business of the parent organisation. While previous research has illustrated employers' needs for new LIS professionals and identified gaps in the skills required for some important areas of work, there has been little change in the demand for highly skilled individuals, who have the motivation to lead multi-skilled groups of staff within projects or at a strategic level.

The recent analysis of over 150 advertisements in the UK for a full variety of professional staff has allowed a snapshot insight into the current employment needs, as expressed within the market place. While adverts are admittedly an inconsistent source of absolutes in the skill requirements of any post, they do represent the impetus for individuals to begin to match themselves against the attributes, qualities, skills and experience that employers express in their recruitment offering.

The most frequently asked for generic capabilities are:

- communication,
- personal IT skills,
- knowledge/awareness of IT systems and applications,
- staff management,
- strategic management,
- interpersonal skills.

The discipline specific skills needed are:

- user needs/user focus/customer care,
- information literacy/user education,
- cataloguing/classification/metadata,
- stock collection/maintenance and promotion,
- developing the role of LIS professionals in technology-based teaching and learning.

There is a whole range of personal attributes and skills that are specifically mentioned in the advertisements. Employers are keen to seek self-motivated, enthusiastic, committed, organised, flexible, creative team players with vision. The generic areas where candidates should demonstrate knowledge include service quality and standards, managing change and project management. LIS discipline specific areas include knowledge/information management, enquiry services, and digitisation of items within collections. Leadership skills are expressly sought for senior roles.

Few information services can ignore the onward trend of IT based systems and IT knowledge requirements, including appreciation of applications. Positions that offer opportunities in 'information architecture' are much more numerous. However, academic information services are leading the way in seeking the emerging skills that LIPs will require, with the strongest demand for knowledge of the role of technology in learning, particularly web based learning within Virtual Learning Environments such as BlackBoard or WEBct. The central role of the Information Professional in supporting a VLE highlights the developmental aspects of integration in teaching, learning and assessment. The LIP becomes central to and engages with the academic community to proactively promote on-line

information literacy within a curriculum within the context of ever-increasing digital information service delivery.

What skills do employers think are important?

Traditionally LIPs work within a context of user focus and support. Many job specifications list strategic thinking among the essential criteria, yet there is evidence from employers that critical and analytical thinking tends to be underdeveloped in some LIPs. As LIS is a graduate profession, this is an issue that must be dealt with at the foundation level within the curriculum at university and subsequently followed up by opportunities to develop within the workplace.

The analysis of employers' needs put project work as a priority. Project work offers rich and powerful opportunities for participants to develop leadership skills and to gain experience in the management of staff and resources. The use of creativity and imagination in everyday work is essential, and is as equally important in the area of service development as in the more obvious areas of web design or artistic flair in publications. It is not enough to just get on with all the regular work, it is important for LIPs to be able to show that they make a difference, so that corporate understanding, impact analysis and lateral thinking are all valuable. As one head of service in an academic library put it, LIPs need to have the skills to persuade the most senior managers of the difference that they make in the library to the student experience. It is also important to think creatively in planning. Scenario planning or trouble shooting can constitute a considerable proportion of daily work. Good lateral thinking and the ability to use evidence-based practice should come easily to the empirical professional group of library and information practitioners.

However, the roll-out of one significant national initiative in the United Kingdom that aimed to make more accessible the information about significant collections in the Arts and Humanities, indicated that a decline in the most traditional of all the skills of our profession, cataloguing and classification, had critical implications. Employers of project staff consistently noted the lack of skills they found in candidates for project posts, eg in the areas of cataloguing, archive work or linguistics. The problem was compounded by the lack of time to invest in training programs for contract staff. It may be expedient to request a high level of skills in all recruitment documents, but the reality is that, in many cases, people with the requisite skills are not easily available.

As a consequence the Research Support Libraries Programme established a steering group to commission research into the human aspects of running this project. The final report highlighted the human issues that were critical, specifically the recruitment, development and retention of project staff in UK higher education libraries and archives projects.²¹ The necessity to build training and development opportunities into all employment opportunities is underscored.

Beyond project work, the dynamic nature of library and information services requires leaders and managers, although this is not the only profession that has identified leadership as one of the most underdeveloped and unavailable of skills. Anecdotal evidence, however, has indicated that management is often viewed as an unpopular aspect of working in LIS. The issue of leadership is multi-faceted and complex, with experience showing too few candidates for Director posts in all sectors; a reluctance of young professionals to opt for management and posts with responsibility for staff and services; a lack of skills in newly appointed managers; and a lack of regard by those in charge of the parent organisation in which the library sits. Two key reports in the United Kingdom, *Recruit, Retain and Lead*,²² focusing on the public library sector, and *Hybrid Information Management: Skills for Senior Staff*,²³

dealing with higher education libraries, stress that management and leadership development must be an essential aspect of Continuing Professional Development (CPD) for all LIPs.

However, with the advent in the UK of a more cross domain organisation, the Museums Libraries and Archives Council (MLA), it was felt that a generic leadership development initiative could potentially be successful, notwithstanding that different organisations with different cultures inevitably require different leadership models, just as individuals need different methods for developing into leaders. It is clear that good visionary leaders are essential, not only to advocate for the roles that the modern LIP can undertake, but also to articulate the value to organisations that information and library services can add.

What are the implications for education and training?

The two research projects are significant because they encourage and support the development of a new framework through which to view the modern day library and information professional, which has implications for the current and future directions of LIS education. As noted, in recent years much has been written on the development and changes necessary in LIS education if it is to remain dynamic and responsive to the evolving information age and to ever-changing marketplace demands. LIS educators often feel that “they are walking a tightrope as they attempt to accommodate the demands of the profession with their own perceptions of what content is needed in the curriculum”. Myburgh argues that a “fresh approach needs to be taken concerning the education and development of the New Information Professional (NIP)”.⁹ She contends it is urgent that there is a suitable response from LIS educators to the growing change within the profession. Library educators are challenged to provide “the necessary skills with which they [the graduates] can gain employment upon graduation, as well as the vision and understanding which might help them cope better with the rapidly changing world in which we live”. The findings of the current research will assist LIS education in meeting this challenge.

It is further believed that the research has a significant impact in the area of lifelong learning or CPD for the LIS industry. It has become imperative for practitioners to keep their skills and knowledge current and relevant. In Australia, ALIA launched its CPD program in 2000 to encourage members to face the challenges of the future: “The dynamic environment of the library and information sector dictates the need for library and information professionals to remain flexible and adaptable to change... Lifelong learning extends and develops the knowledge, skills and competencies of practitioners. It also enables them to prepare for their work more effectively, to broaden their careers and to undertake new tasks”.²⁴ Significantly, the distinction is made in the program between the necessity of developing both *LIS Specific Areas* (eg information resources, resources acquisition and management) and *Generic Area* (teamwork, effective communication, critical and evaluative thinking).

While the universities can adopt a proactive stance to incorporate new areas of knowledge and skills into the LIS curriculum, new developments, such as the e-learning environment in universities, require existing staff to grow and develop. Universities have taken different approaches to this issue, with some, like Sheffield Hallam University, creating a critical mass of staff with e-learning experience by seconding academic staff to the Learning and Teaching Institute. These staff were encouraged and supported in their quest to achieve the current best practice in institutional e-learning developments and to develop a community of practice both within Sheffield Hallam University and collaboratively with the University of Sheffield. The hybrid skills required for this work in an e-learning environment are perhaps one of the best examples of the ‘skills of the 21st century’ as illustrated earlier in this paper.

An ideal situation would be for all current LIS employers to meet regularly in a collaborative forum dedicated to the development of the professional staff in their current and future employ. At this point in time, professional development is erratic, with little or no strategic intent apparent within the context of staff development.

Drawing on the e-learning example from Sheffield Hallam University, the model for the acquisition of new and emerging skills requires a full and balanced contribution from all stakeholders. Table 4 illustrates the contribution to be made by the different stakeholders.

Table 4 Overview of stakeholder contribution

Individual	Motivation	Credits Qualifications	Experience Skills Competencies
Educator	Curriculum	Standards Quality Relevance	Awards
Organisation	Development & Training	Experience	Opportunity
Professional body	Educational and Professional Qualifications CPD	Accreditation of courses Certification of experience	Linkages Advocacy

One of the biggest hurdles, however, is to reconcile the need for skills development at the national level with the fact that most staff development takes place at the local level of the individual institution. In the UK, it has been acknowledged that academic library staff needs to tap into:

- their own organisations – libraries and/or learning centre departments must be committed to innovating within the area of e-learning,
- national organisations such as the Joint Information Systems Committee (JISC) for technological developments, and the UK Higher Education Academy for the pedagogic developments,
- their professional body.

Professional bodies, such as CILIP or ALIA, have a significant role to play. In the UK, CILIP has been active in the promotion of the ‘traditional skills’ within the newer context of the web. Articles have appeared in the professional press confirming the renaissance of classification, cataloguing, indexing and thesaurus construction.²⁵ In both countries, there are positive signs of appreciation of the specific professional skills that contribute to developments in digitising, content management, and, in the context of e-learning, the use of re-useable learning objects.

Conclusion

A series of challenges is offered to all stakeholders in the LIS arena:

- for industry practitioners either reading this article to determine a way forward within their own immediate context,
- for employers to join with the professional bodies to determine what is and is not available as professional education,
- for educators to be invited to join with employers and professional bodies to focus on career-long learning opportunities.

The greatest challenge is offered to the policy makers and agencies that determine the outcome of 'information policies' to recognise the full implication of the initiatives and strategic developments that they support, to ensure that the contribution made by LIPs is clearly visible and acknowledged as a critical success factor. This will require a considerably more coordinated approach to skills acquisition, development and CPD, involving educators, practitioners and professional associations.

The main contribution that professional associations such as CILIP and ALIA can make is to support and provide a variety of learning opportunities. The professional association needs to play an important role in the development and delivery of both generic and specific skills-based courses. The emergence of the new Framework of Qualifications in the UK from CILIP has focussed attention on the body of professional knowledge and the way in which professionals retain their validity in the market place. Employers need to carefully consider the development needs of their staff and to encourage and support staff in their career-long learning, acknowledging that CPD is an essential dimension of being a library and information professional. Watson and Huckle²⁶ have highlighted how employers can benefit from the new CILIP Framework of Qualifications, while ALIA is focusing strongly on aligning their professional development scheme with employers' own staff development programs.

In the twenty first century, libraries and information agencies require staff with innovative ideas and vision to create and sustain valued, effective services to users, and to contribute to the success of the organisation. Career-long learning is therefore integral to professional success, and individual professional development needs to be supported through a combination of education, personal achievement and work-based opportunities.

References

¹ Lovato-Gassman, B. Librarians in the twenty-first century. In: Bridges, K. (ed) *Expectations of Librarians in the Twenty-First Century*. Westport: Greenwood, 2003.

² Salter, A. Wanted – new creations: dinosaurs need not apply. In: Bridges, K. (ed) *Expectations of Librarians in the Twenty-First Century*. Westport: Greenwood, 2003.

³ Huckle, M. The new framework for qualifications: a progress report. *Impact* 2003, 6, 1. URL <<http://www.careerdevelopmentgroup.org.uk/impact/sprin03/framework.htm>>

⁴ Brine, A. & Feather, J. Supporting the development of skills for information professionals. *Education for Information* 2002, 20, 253-262.

⁵ Irwin, R. Characterizing the core: what catalog descriptions of mandatory courses reveal about LIS schools and librarianship. *Journal of Education for Library and Information Science* 2002, 43 (2), 175-184.

⁶ Maceviciute, E. Information management in the Baltic, Nordic and UK LIS schools. *Library Review* 2002, 51 (3/4), 190-199.

⁷ Koehler, W. Professional values and ethics as defined by 'the LIS discipline'. *Journal of Education for Library and Information Science* 2003, 44 (2), 99-119.

⁸ Middleton, M. Skills expectations of library graduates. *New Library World* 2003, 104 (1), 42-56.

⁹ Myburgh, S. Education directions for NIPs (new Information Professionals). 11th *Information Online Exhibition and Conference*, 2003. URL <<http://conferences.alia.org.au/online2003/papers/myburgh.html>>

¹⁰ Raju, J. The 'core' in library and/or information science education and training. *Education for Librarianship* 2003, 21, 229-242.

- ¹¹ Tedd, L.A. The What? And How? of education and training for information professionals in a changing world: some experiences from Wales, Slovakia and the Asia-Pacific region. *Journal of Information Science* 2003, 29 (1), 79-86.
- ¹² Roggema-van Heusden, M. The challenge of developing a competence-oriented curriculum: an integrative framework. *Library Review* 2004, 53 (2), 98-103.
- ¹³ Bridges, D. Transferable skills: a philosophical perspective. *Studies in Higher Education* 1993, 18 (1), 43-51.
- ¹⁴ Atlay, M. & Harris, R. An institutional approach to developing students' transferable skills. *Innovations in Education and Training International* 2000, 37 (1), 76-84.
- ¹⁵ Mayer, E. *Putting Education to Work: The Key Competencies*. Melbourne: Australian Education Council and Ministers for Vocational Education and Training, 1992.
- ¹⁶ Oliver, R. & McLoughlin, C. Exploring the practice and development of generic skills through web-based learning. *Journal of Educational Multimedia and Hypermedia* 2001, 10 (3), 207-226.
- ¹⁷ Down, C., Martin, E., Hager, P. & Bricknell, L. Graduate attributes, key competence and judgements: exploring the links. *Cornerstones: What Do We Value in Higher Education? HERDSA International Conference* 1999. URL <<http://www.herdsa.org.au/vic/cornerstones/authorframeset.html>>
- ¹⁸ Partridge, H. & Hallam, G. The double helix: a personal account of the discovery of the structure of the information professional's DNA. In: *Challenging Ideas: ALIA 2004 Biennial Conference* 2004. URL <<http://conferences.alia.org.au/alia2004/pdfs/partridge.h.paper.pdf>>
- ¹⁹ Watson, J. D. *The Double Helix: A Personal Account of the Discovery of the Structure of DNA*. London: Weidenfeld & Nicholson, 1981.
- ²⁰ Australian Library & Information Association (ALIA). *The Library and Information Sector: Core Knowledge, Skills and Attributes* 2003. URL <<http://www.alia.org.au/policies/core.knowledge.html>>
- ²¹ Research Support Libraries Programme (RSLP). *The Human Issues in LIS Projects*. Edinburgh: RSLP, 2002. URL <<http://www.rslp.ac.uk/circs>>
- ²² Usherwood, B., Proctor, R., Bower, G., Coe, C., Cooper, J. & Stevens, T. *Recruit, Retain and Lead. The Public Library Workforce Study*. Sheffield: Centre for the Public Library and Information in Society, Department of Information Studies, University of Sheffield, 2001. URL <<http://cplis.shef.ac.uk/workforce.pdf>>
- ²³ Dalton, P. & Nankivell, C. *Hybrid Information Management: Skills for Senior Staff. Draft Final Report and Recommendations*. Birmingham: Centre for Information Research, University of Birmingham, 2001. URL <<http://www.himss.bham.ac.uk/>>
- ²⁴ Australian Library and Information Association. *ALIA CPD Scheme Guidelines* 2001. URL <<http://www.alia.org.au/education/cpd/guidelines.html>>.
- ²⁵ Broughton, V. *Essential Classification*. London: Facet Publishing, 2004.
- ²⁶ Watson, M. & Huckle, M. Employers' support is vital to success. *Library and Information Gazette*, 17 December 2004.

DEVELOPING FOR THE NEW ACADEMIC LIBRARY FUNCTION: KNOWLEDGE AND SKILLS REQUIREMENTS AMONG LIBRARY PERSONNEL AND TEACHING FACULTY

Kari Gulbraar

Assistant Director

Oslo University College Learning Centre

kari.gulbraar@adm.hio.no

*Turn, turn, my wheel! All things must change
To something new, to something strange;
Nothing that is can pause or stay.*

From 'The Song of the Potter'

Henry Wadsworth Longfellow (1807-1882)

Abstract

This study across seven Canadian and three Norwegian universities concentrates on library developments involving Learning Centres and Information Literacy. Library personnel and teaching faculty responded to questionnaires, and Canadian library personnel were interviewed. Change processes in academic libraries affect the organisational level as well as the individual employee's everyday work situation. There is a lack of awareness about library development and practice among teaching faculty. Half of the library personnel respondents feel a high demand for 'training in database search knowledge' and 'general electronic resources'. Norwegian respondents show greater need for developing teaching skills, but assessment of learning outcomes', 'classroom instruction' and 'one-on-one tutorial' reached the highest score in both countries. Pedagogy/teaching is the area where people felt the most overt need for more focus in LIS university or college curricula. Job descriptions will to a certain extent keep pace with developments in academic libraries. 80-90 % of teaching faculty require 'new knowledge of available information resources' and 'search technique skills'. 'Skills to teach bibliographical management' are required by almost 2/3 of the Norwegian participants, twice the number compared to the Canadian material. Nearly 1/3 of the teaching faculty respondents would like to develop their co-operation with library instructors.

Introduction

This Norwegian-Canadian study focuses on skills development requirements as perceived by library personnel and teaching faculty. During twelve years of experience with academic library staff development I have witnessed the creation of a new planning function, and I now consider professional development to be a central strategic planning feature. Compared to the traditional library model in which personnel duties included a considerable portion of materials handling, the new library model requires more personnel hours interacting within a learning environment. Modern concepts in librarianship include information literacy, information competency, learning centres, learning resource centres, learning commons, information commons, knowledge commons, seamless libraries – the list may be longer – and these concepts carry the implication of substantial change to the content of library services. So much so, in fact, that many academic libraries have adopted new names to mirror the development.

Despite these changes, library personnel sometimes feel that their professional development and training requirements are not being met. On the other hand, teaching faculty do not possess the required knowledge about the information literacy approach to include this in their teaching models.

The study reported below was carried out during a period as Visiting Scholar at the University of Regina Libraries, November 1st 2003 to October 30th 2004. It was made possible by the combination of a Senior Scholarship Grant from my home institution Oslo University College (OUC) and the International Liaison Programme at the University of Regina.

Continuing professional development

During recent decades continuing education has become increasingly important for many professions. As Roberts and Kohn write;

... it has had to be recognized that once-for-all systems of education and training, at any level, provide less satisfactory preparation for living and working in contemporary and likely future social and economic contexts. It has become frustratingly evident that knowledge and skills obtained during initial education and training programmes are being rendered obsolete or irrelevant in many fields of activity.¹

Continuing professional development (CPD) has to be part of a strategic planning process and must lead to staff development programs:

There are two interlocking aspects of a staff-development program. First, every program component must contribute to continuous learning. Second, and inextricably tied up with the first, no employee should be permitted to wither away, year after year, in a series of unchanging responsibilities. In short, successful staff development means change.²

Hypothesis

Academic library development processes frequently require changes in an individual's job situation. In particular, an increase in the importance of information technology (IT) in the library environment will have a large impact on job content development. Electronic equipment and resources play an increasing role in many library services and collections. The implication of this has been substantial changes, for library patrons as well as for personnel. Electronic resources also play an increasing role in the overall teaching and learning process, involving faculty and students alike.

Technological development is, however, not the only factor impacting on library personnel. An increasingly complex range of knowledge sources calls for additional user instruction, and library instruction is far more complex than a decade ago. Teaching skills as well as interpersonal relations skills at the reference desk are now crucial qualities looked for in library professionals. As student workloads increase, library instruction outside of curricula makes little sense. Liaison with faculty is critical when it comes to incorporating library instruction into curricula and adapting it to term schedules.

Likewise, new pedagogical methods call for new skills among academic teachers. Faculty will need to develop their knowledge of how to include Information Literacy in their teaching.

Definitions

Learning centre has previously been given various definitions. The understanding of the concept expressed in this paper is based on the model developed at the Sheffield Hallam University Learning Centres. This model was the basis for the development of the Oslo University College Libraries into Learning Centres as defined by Hans Martin Fagerli;

A Learning Centre only emerges when a Learning Resource Centre is deliberately included in a pedagogical programme... A Learning Centre is a physical combination of library, IT, reading space, group rooms etc., and a co-organisation of user support functions combined with pedagogical focus to secure optimal learning outcomes of the interaction between learning resources, support services and students.³ (author's translation)

The term 'learning centre' is therefore used to describe a Learning Centre, Learning Resource Centre, Knowledge Commons, Learning Commons, Information Commons or similar concepts.

Information literacy as defined in this paper has been adopted from the definition devised by the American Library Association's. (ALA, 1989)

To be information literate, a person must be able to recognize when information is needed and have the ability to locate, evaluate, and use effectively the needed information... Ultimately, information literate people are those who have learned how to learn.⁴

This ALA definition formed the basis for the development of information literacy policy and practice at the OUC Learning Centres.

Participating institutions

While at the University of Regina I found the widened scope of Western Canada to provide an opportunity to secure greater participation for more reliable survey results. The Norwegian institutions outside of OUC were selected because of their regional proximity. Participating institutions were as follows:

Canada:

- Saskatchewan Institute of Applied Science and Technology (SIAST), Regina, Saskatoon, Moose Jaw and Prince Albert, Saskatchewan.
- Simon Fraser University (SFU), Vancouver, British Columbia.
- University of Calgary (UofC), Calgary, Alberta.
- University of Manitoba (UofM), Winnipeg, Manitoba.
- University of Regina (UofR), Regina, Saskatchewan.
- University of Saskatchewan (UofS), Saskatoon, Saskatchewan.
- University of Winnipeg (UofW), Winnipeg, Manitoba.

Norway:

- Oslo University College (OUC), Oslo, Norway.
- University of Oslo (UofO), Faculties of Humanities and Social Sciences, Oslo, Norway.
- Vestfold University College (VUC), Horten, Norway.

Literature review

The need for education and skills training among personnel has been the focus of library developers in different parts of the world. In 1999 the Australian Catholic University (ACU) "[conceived] a university-wide teaching and learning enhancement project that targeted personnel at all levels of the university, across all campuses and all disciplines".⁵ This study is especially interesting in that it includes teaching faculty as well as library personnel.

Queensland University of Technology (Brisbane, Australia) in their EduLib: Staff Development Program, defined their quest as being, "to broaden their teaching and learning role, [and] recognised the need to address the specific educational needs of the teaching

librarians". They designed a QUT Library Teaching Staff Development Program for this purpose.⁶

Academic libraries in the UK were pioneering in the adaptation of a learning centre model. In his introduction to *Centred on Learning: Academic Case Studies on Learning Centre Development*, Edward Oyston writes:

The purpose of this book is to explore what this learning centre approach can mean in practice. It does so by examining how academic services in four universities have developed the particular learning needs of their students, with a view to drawing from their experience the elements that contribute to the learning centre approach. All have undergone radical change in terms of role, organisation, range and nature of service provision.⁷

Another UK initiative known as the SKIP (Skills for new Information Professionals) Project concluded that:

The SKIP evidence confirms that information professionals are adopting roles in teaching and training, learner support, and liaison with Faculties or schools. IT skills are important and are valued, but they need to be constantly updated and can quickly become redundant... Staff were often critical of training in terms of when, how and by whom it was delivered. They often felt it failed to satisfy their immediate needs. Service managers therefore need to assess the training needs of their staff, and look for new methods of delivering training.⁸ (P. III).

In a further study conducted in 1999 at Sheffield Hallam University Learning Centre⁹ staff members described needs they had felt for developing new skills during the learning centre development and how these needs had (or had not) been met.

Questionnaires

A web-based questionnaire was preferred since all library personnel were considered to have sufficient computer skills. In order to obtain permission to perform the survey from Research Ethics Boards or equivalent bodies in eight out of the ten participating institutions it was necessary to approach faculty with a printed questionnaire. A web-based version was an alternative, but very few respondents made use of it. The questionnaires were designed with as few questions as possible. Different versions were made for library personnel and teaching faculty respectively, and in both English and Norwegian.

Statistical analysis

Dr. Andrei Volodin, Assistant Professor, University of Regina, Dept. of Mathematics and Statistics and Supranee Lisawadi, Ph.D. student in Statistics, University of Regina, Dept. of Mathematics and Statistics, assisted with the analysis of my material using SAS statistical software.

Hypothesis testing is generally not used in this type of survey analysis. Therefore *descriptive* statistics were used, requiring no hypothesis testing or p-value.

Table 1 Response rate

	Library personnel			Teaching faculty		
	Sent	Replies=n	Rate	Sent	Replies=n	Rate
Norway	135	59	43.7	641	144	22.5
Canada	683	181	26.5	2,226	150	6.7
Sum	818	240	29.3	2,867	294	10.3

The response rate of the survey may look low for certain groups. The sample size is, however, sufficient to produce valid and statistically consistent conclusions.

There is always risk of bias(es) in a survey. The responses will represent the respondents, the people who were interested enough or had time enough to return the questionnaires. My sample of institutions cover geographically limited areas in South-Eastern Norway and Western Canada. The statistical conclusions will not be valid for the whole of Canada or the whole of Norway, but I consider them very interesting from the topical point of view and a solid basis for the conclusions.

Note: Due to use of a Norwegian version of Excel spreadsheet software graphs show decimals in the Norwegian numeral format with a comma. For tables, it has been possible to convert decimals into the point format.

Interviews

Analysis of the questionnaire responses formed the basis for a series of structured interviews with a 10% random selection of library personnel at the Universities of Calgary, Manitoba, Regina and Saskatchewan. Information derived from the interviews was used for complementing and supplementing data from the questionnaires.

Demographics

Library personnel age groups

Table 2 Library personnel, age groups

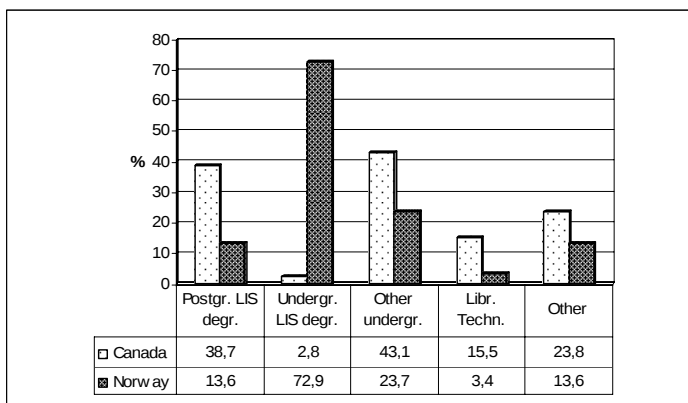
	Canada	Norway
20-29	8.9	1.8
30-39	13.9	17.5
40-49	31.1	22.8
50-59	37.8	38.6
60 & <	8.3	19.3
	100.0	100.0

The survey indicates that academic library personnel is an aging population with a large portion of the work force in the two oldest age groups, compared to relatively few in the two youngest: Norway as much as 57.9% to only 19.3%, Canada with a somewhat better ratio of 46.1% and 22.8% respectively. Academic libraries in both countries will apparently have a succession problem when their present library workers reach retirement age.

Library personnel educational background

Library faculty members employed in Canadian academic libraries are required to have a postgraduate degree in Library and Information Science (LIS). This is not the case in Norwegian academic libraries where most librarians have a LIS undergraduate degree. Subject specialists in Norwegian university libraries have graduate degrees, normally in a non-LIS discipline.

Figure 1 Library personnel, formal educational background. (Respondents were invited to indicate more than one alternative).



Library personnel position in library

In Canadian academic libraries most librarians are faculty members, with only a few employed in non-faculty positions. In Norwegian academic libraries the librarians normally belong to the Administrative Professional & Technical Employee group. Only subject specialists in the big university libraries are faculty members. For practical comparison purposes, the *faculty* (*universitetsbibliotekar eller annen faglig stilling*) and *librarian* (*bibliotekar*) categories from the Norwegian survey have been merged in Table 3.

Table 3 Position in library

Canada n=179	Count	%
Faculty	58	32.2
Management	16	8.9
Support staff	97	53.9
Other	8	4.4

Norway n=56	Count	%
Faculty/Librarian	42	75.0
Management	5	8.9
Support Staff	2	3.6
Other	7	12.5

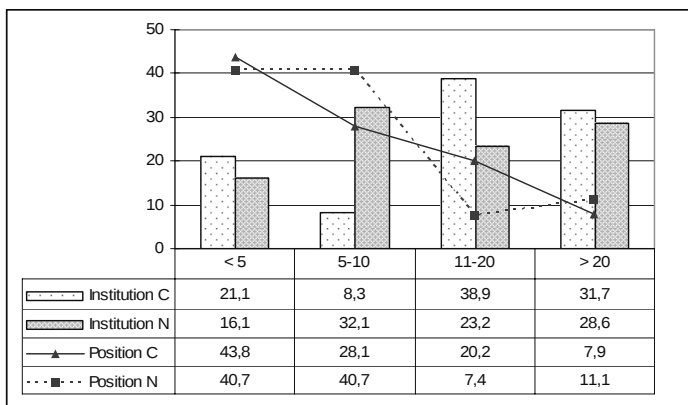
Library personnel professional experience

The participating library personnel were asked two questions to establish the duration of their professional experience:

Question 1.6. How long have you been working in present institution?

Question 1.7. How long working in present position?

Figure 2 Library personnel, years of professional experience



These results indicate that academic library personnel are 'loyal' to their workplace. In Canada 70 %, and in Norway 52 %, have worked for more than 10 years in the same institution. However, many do change jobs in their libraries. More than 40 % in both countries have been less than five years in their present position, and only about 10 % are in the same position after twenty years.

Teaching faculty age groups

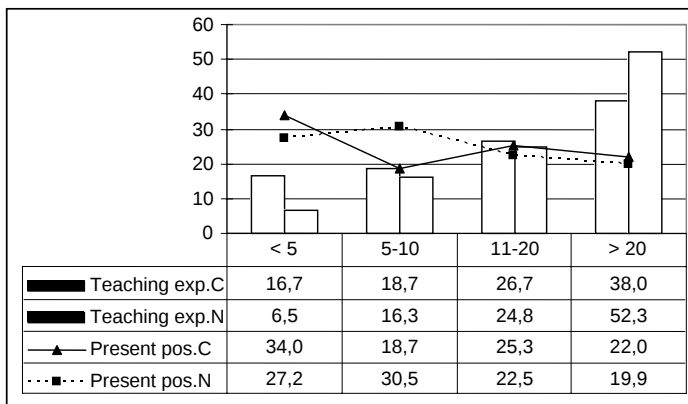
Table 4 Teaching faculty, age groups

	Canada	Norway
20-29	1.3	0.0
30-39	22.5	3.9
40-49	29.1	20.9
50-59	33.1	52.3
60 or <	13.9	22.9
	100.0	100.0

Even more so than academic library personnel, teaching faculty in the surveyed universities are an aging group. In the oldest category the higher percentage of Norwegian respondents can be explained in part by a higher average retirement age in Norway. Also, as a way to renew faculty and manage the massive number of retirements expected in the next few years, the University of Regina in 1998 introduced a Faculty Renewal/Voluntary Severance Program (FR/VSP). These factors can also explain the fact that from the Norwegian data there are no teachers in the youngest category.

Teaching faculty professional experience

Figure 3 Teaching faculty, years of professional experience



As with the library personnel, teaching faculty are loyal to their profession. In Canada 65 % and in Norway 77 % have more than 10 years of teaching experience. University teachers change jobs, although less frequently than do library personnel. Around 30 % in both countries have been less than five years in their present position, but approximately 20 % are in the same position after twenty years.

Library development

The participating library personnel were asked which of the survey relevant developments has taken place in their libraries. The answers make it clear that libraries are indeed organisations of change.

Table 5 Library development focus

	Canada %	Norway %
Learning Centre model	23.4	23.2
Information Literacy model	12.9	19.6
Both	54.4	55.4
Other	9.4	1.8
Total	100.0	100.0

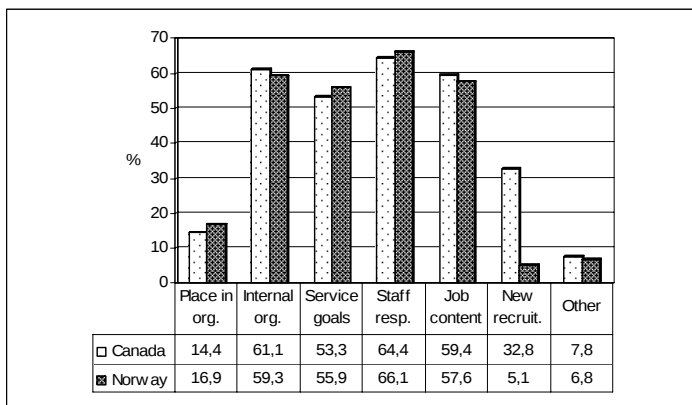
Organisational change

The development process has brought a number of changes in the organisational and physical frameworks of the academic libraries. In the following Figure, library personnel listed changes in the libraries as perceived by the individuals.

Figure 4 Organisational change. (Respondents were invited to indicate more than one alternative). Reply options:

- a change of library's place in mother organisation

- b change of library's internal organisation
- c new service goals
- d change of staff responsibility area(s)
- e change of staff's job content
- f recruitment of new staff
- g other



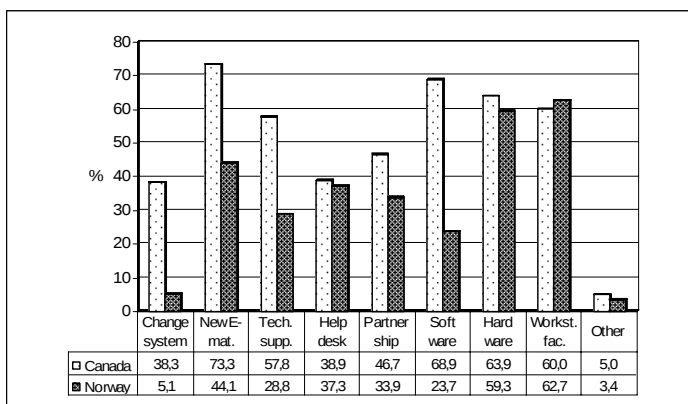
These results indicate that organisational change has been noticeable. Not so much regarding the library services' place in the mother organisation, but in both countries approx. 60% of the respondents indicate change in the libraries' internal organisation and well over 50% have seen a change in service goals.

Under those circumstances, the resulting changes in staff's responsibility areas (approx. 65%) and job content (nearly 60%) are only what might be expected. Still, this represents a considerable change in library personnel's work situation. In Canada the development has resulted in recruitment of new staff, as indicated by nearly 33% of respondents. Only about 5% of the Norwegian respondents have had that experience.

Information technology related change

Figure 5 IT related change. (Respondents were invited to indicate more than one alternative). Reply options:

- a change of integrated library system
- b new e-materials available
- c library staff providing technology support
- d technical helpdesk function served by new staff
- e partnership with department outside of library to deliver student support
- f new software applications
- g new workstation hardware
- h new facility or redesigned workstations area
- i other



Other than *New facility or redesigned workstations area* (one of the typical Learning Centre model features) the Canadian academic libraries seem to have had more change. This column, showing change for approx. 60% in both countries, and the same for *New workstation hardware*, imply a radical change in library facilities for student patrons.

The overwhelming difference in the *Change of integrated library system* column is explained by the fact that all Norwegian academic libraries share the same integrated system, BIBSYS, which is also a union catalogue for the National Library and other special and/or research libraries.

The difference in the *New software applications* column will be related to the new integrated library systems in the Canadian libraries. Canadian academic library development seems to have focussed more on making available new electronic materials, but the considerable difference can also be related to whether Library Personnel relates this change to the developments covered by the present survey.

As a result of the developments library personnel provide more technical support to patrons, and Canadians twice as much as Norwegians. On the other hand, about 40% of all respondents indicated that the Technical Helpdesk function is being served by new staff. Visits to the libraries indicate that by and large the 'New staff' are part time student workers.

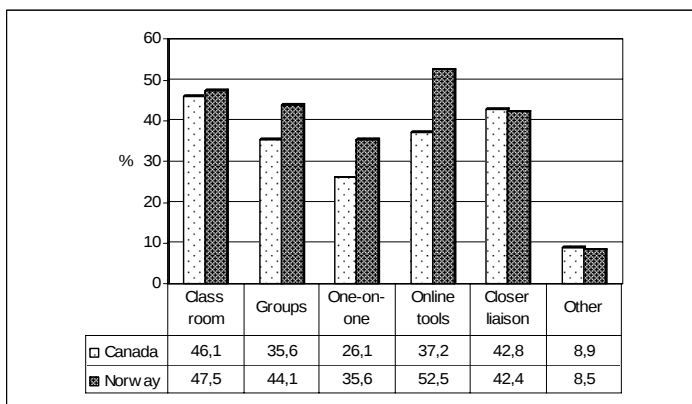
The survey section on IT related change establishes the extent of the change without indicating to what degree this implies an increased workload. When it comes to change in library instruction, however, the outcome seems to have been 'more of everything' (see figure below). The questionnaire did not ask what areas of work do library personnel work *less* than before. The present survey does not aim at giving the total picture of what library workers do, but to discover those fields which require new skills.

Library instruction change

Figure 6 Library instruction change (Respondents were invited to indicate more than one alternative). Reply options:

- a more classroom instruction
- b more instruction in smaller groups
- c more one-on-one tutorials
- d development of on-line tutorial(s)
- e closer liaison with Teaching Faculty

f other



Norwegian respondents have experienced a greater change in the Library Instruction part of their workload. This corresponds with Table 2 where 19.6 % of the Norwegians indicate an Information Literacy model development, compared to 12.9 % of their Canadian colleagues.

Teaching faculty results

Teaching practice

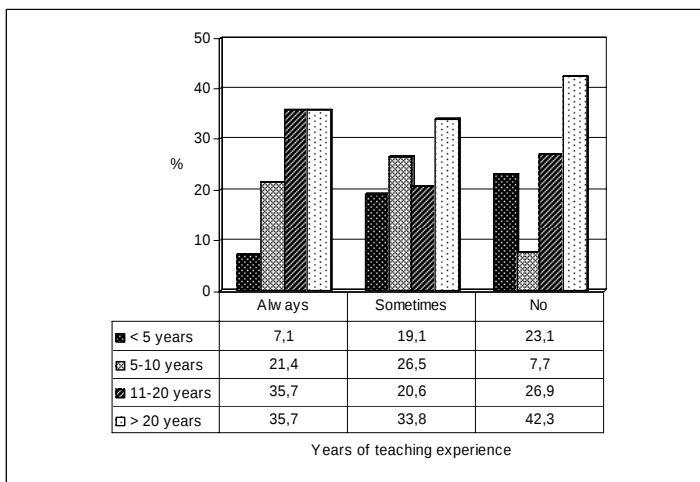
The American Library Association's definition of information literacy (1989) states that "To be information literate, a person must be able to recognize when information is needed and have the ability to locate, evaluate and use effectively the needed information". To discover whether teaching faculty considers it part of their responsibilities to pass on this kind of knowledge to their students, they were asked the following question: "In your teaching, do you particularly focus on students' research methods for their assignments?"

Table 6 Teaching faculty focus on students' research methods

	Canada	Norway
Always	22.5	44.7
Sometimes	53.6	42.1
No	23.8	13.2
	100.0	100.0

This is an area with obvious differences between the two countries. Twice as many in the Norwegian material indicate that they 'always' have this focus, and among the 'no' answers we find substantially more Canadians. In order to determine whether other factors have an influence on this practice, the parameter 'Years of teaching experience' was also examined:

Figure 7 Teaching faculty (Canada) focus on students' research methods



The extremes here are noteworthy. The ‘always’ category of the Canadian respondents is made up by less than one third from the groups with the shortest teaching experience and more than two thirds in the groups with more than ten years of experience.

Information literacy in the learning environment

One does not always find that there is a profound knowledge of conditions across departments or faculties among members of academia. Extensive workload and ‘publish or perish’ expectations are no doubt among the reasons for this. One of the fields where cross faculty/library information is crucial is information literacy.

Table 7 Awareness of information literacy programme development in library

	Canada	Norway
Yes	42.0	40.8
No	2.7	4.6
Not sure	55.3	54.6
	100.0	100.0

Almost 60 % do not know or are not sure whether such a development is or has been happening in their library.

Three questions were also asked about teaching faculty and information literacy. These included Question 2.2, “Are you familiar with the term of Information Literacy in the learning environment?” (A definition of information literacy was provided).

Table 8 Familiarity with term ‘information literacy’

	Canada	Norway
Yes	62.0	38.2
Not sure	16.7	20.4
No	21.3	41.5
	100.0	100.0

The Canadian 62 % ‘yes’ is promising, but still 38 % of teaching faculty do not know or are ‘not sure’ about the term ‘information literacy’ - by no means a new concept in the learning environment. But almost 62 % of the Norwegian respondents are not sure or not familiar with the term information literacy (*informasjonskompetanse*) - a real challenge to the library personnel seeking improved cooperation.

Table 9 Information literacy instruction part of curriculum?

Question 2.3. Has Information Literacy instruction been included in the curriculum of your programme/course(s)?

	Canada	Norway
Yes	40.0	47.7
Not sure	12.0	30.5
No	48.0	21.9
	100.0	100.0

Table 10 Learning outcomes part of course assessment

Question 2.4. If “Yes” on 2.3, are learning outcomes of the Information Literacy instruction part of the course assessment?

	Canada	Norway
Yes	45.6	48.1
No	54.4	51.9
	100.0	100.0

From these results it is apparent that less than 50 % of the responding teaching faculty has information literacy instruction included in their curriculum. As this is one of the main goals for information literacy instruction planning, there is still a long way to go, especially judging from the high ‘no’ percentage from Canadian respondents.

The ‘not sure’ answers are not easily interpreted, in that surely teachers should know whether or not this instruction is part of their own courses. One interpretation is that they are uncertain whether IL instruction is part of the curriculum of a total programme.

The results shown in Table 10 make it obvious that more than half of the ‘yes’ answers to question 2.3 actually indicate that IL instruction is included in timetables, but does not have significance as part of course assessment.

In the following question teaching faculty were asked for their opinion on how or by whom information literacy instruction should be given to students.

Table 11 Preference for information literacy instruction

Reply options:

- a I would prefer the librarians to undertake this instruction
- b I would prefer to undertake this instruction myself
- c I would prefer the instruction to be a cooperation between Library and Faculty
- d other

	Canada	Norway
Librarians	29.4	19.7
Myself	4.2	0.7
Library/Faculty	65.7	78.3
Other	0.7	1.3
	100.0	100.0
Other:	• Depends on the course • Online tutorials	• No need for this instruction (<i>Har ikke behov for slik undervisning</i>)

The clear majority of respondents want IL instruction to be a joint venture between library and faculty. This is not unexpected, as this seems to be an ideal area for cooperation. The nearly 30 % (Canada) and nearly 20 % (Norway) who want this instruction to be done by librarians, most likely consider library personnel to be better qualified for the job. On the other hand, it could also be another side of teachers' preferences faced with an overwhelming workload.

Very few respondents want to undertake this instruction themselves, a result somewhat at odds with those in Table 10: 22.5 % (Canada) and 44.7 % (Norway) "particularly focus on students' research methods". Could this mean that teachers do not regard as research methods the learning outcomes of Information Literacy instruction?

Given that an IL normally involves instruction by librarians, teaching faculty were asked whether they are familiar with the content of this instruction in their classes.

Table 12 Awareness of IL instruction content

	Canada	Norway
Yes	36.4	28.3
No	36.4	44.7
Not sure	14.6	23.7
N/A	12.6	3.3
	100.0	100.0

That more than 50 % (Canada) and nearly 70 % (Norway) of the teaching faculty do not know or are not sure about the content of the librarians' IL instruction in their classes, might well indicate one of their reasons for wanting this to be Library/Faculty cooperation. The 'N/A' (Not Applicable) answers most probably imply that there is no IL given in these respondents' courses.

With varying impressions of teaching faculty's attitude, knowledge and awareness of IL presence in the learning environment, it is interesting to see the response to questions concerning the 'Information Literate Student'.

To be information literate, a person must be able to recognize when information is needed and have the ability to locate, evaluate and use effectively the needed information. Ultimately, information literate people are those who have learned how to learn.³

Based on this ALA definition the respondents were asked to reflect on the following statements, adapted from The Association of College and Research Libraries 'Information Literacy: Competency Standards for Higher Education'¹⁰ and to rate their understanding of the library's importance in obtaining the expressed goals.

Table 13 Categories a-e starts with "The information literate student - "

- a - determines the nature and extent of the information needed
- b - accesses needed information effectively and efficiently
- c - evaluates information and its sources critically
- d - individually or as a member of a group, uses information effectively to accomplish a specific purpose
- e - understands issues concerning copyright and plagiarism in the use of information

To the Information Literate Student the Library Is -					
	very important	important	of minor importance	unimportant	not sure
a	25.3	43.2	23.3	5.5	2.7
b	65.1	28.8	4.1	0.0	2.1
c	26.7	30.8	31.5	8.9	2.1
d	20.6	32.9	36.3	6.9	3.4
e	40.8	36.1	13.6	5.4	4.1

The high values for 'very important' and 'important' leave little doubt about teaching faculty's confidence in the library, mainly in teaching students how to 'access needed information effectively and efficiently' and 'understand issues concerning copyright and plagiarism in the use of information'.

It is, however, interesting to see areas where this confidence is not so high, and where the 'minor importance' and 'unimportant' replies score relatively high values. 'The information literate student evaluates information and its sources critically' and 'the information literate student understands issues concerning copyright and plagiarism in the use of information' are both areas of great importance to the student and future researcher, and important areas for any IL programme. One would expect this to be one of the important subjects for cooperation between library and teaching faculty – especially since only 23 respectively 45 percent of the Canadian and teaching faculty focus on students' research methods in their teaching (Table 10).

Learning centres in the learning environment

As indicated in above, 'learning centre' in the context of this paper covers terms such as learning resource centre, knowledge commons, learning commons, information commons or similar concepts. In the questionnaires to teaching faculty the terms 'information commons/knowledge commons' or '*læringssenter*' (learning centre) were used.

Table 14 Familiarity with the learning centre model

	Canada	Norway
Yes	25.8	60.1
No	55.6	16.3
Not sure	18.5	23.5
	100.0	100.0

Again we have a situation with almost reverse figures. Here we see that as many as 74 % of the Canadian respondents are not familiar with or not sure about the learning centre model, whereas 60 % of the Norwegian respondents answered 'yes' to this question. Still as many as 40 % of teaching faculty in the Norwegian sample need updating on this subject.

Table 15 Awareness of learning centre model development in libraries?

	Canada	Norway
Yes	25.3	44.1
No	2.7	7.9
Not sure	72.0	48.0
	100.0	100.0

Too many, especially in Canada, are 'not sure' whether this kind of development has taken place in their institution. This is another information and marketing challenge for libraries.

New knowledge or skills requirement

Library personnel

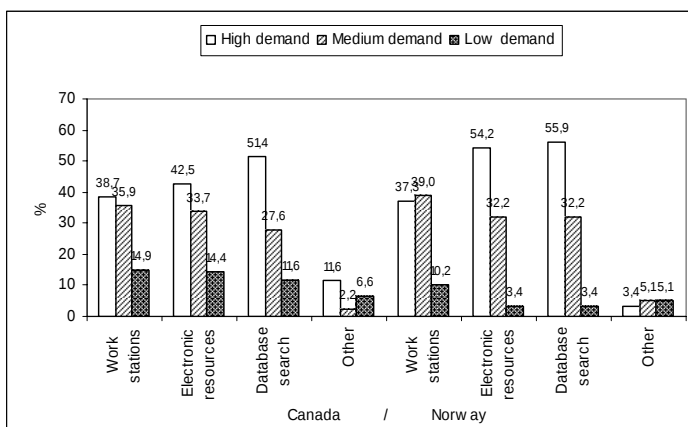
What are people working in universities thinking about with regard to their own need for professional development? Have their needs been met with designated educational or training programmes? What kind of training was offered? I will concentrate on two areas of training need: information technology and library instruction.

Information technology training needs

Figure 7 Information technology training needs

Reply options:

- a workstation applications
- b general electronic resources
- c database search knowledge
- d other

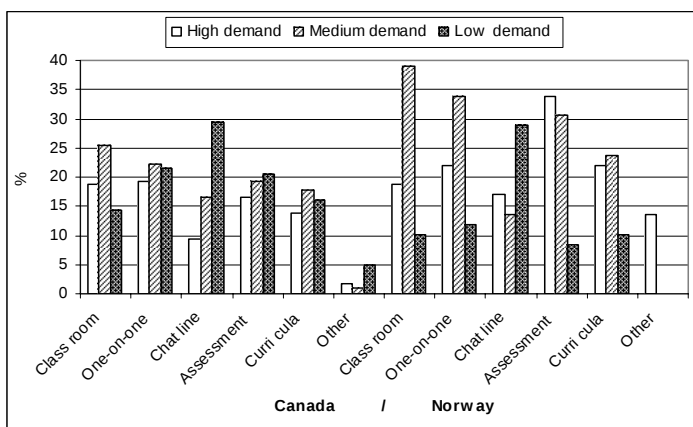


The opening hypothesis was that information technology related challenges would be a significant factor in library developments. We see that more than half of both populations indicated a high demand on 'database search knowledge', and more than one third needs to know more about 'workstation applications'. The difference in 'general electronic resources' (approx. 5 %) is not sufficient to indicate any reliable conclusion, but it could be that the Canadian academic libraries have had a longer history of extensive use of electronic resources.

Library instruction training needs

Figure 8 Library instruction training needs. (Respondents were invited to indicate more than one alternative). Reply options:

- a classroom instruction
- b one-on-one tutorial
- c chat line instruction
- d assessment of learning outcomes
- e faculties' curricula
- f other



Whereas on 'IT training needs' nearly all the high scores were on 'high demand', we find a different picture when it comes to 'Library instruction'. Nearly all categories are higher on the 'medium demand'.

In the follow-up interviews the one particular subject field mentioned by most interviewees as lacking in their LIS education or in present LIS programmes, was pedagogy or teaching skills. In academic libraries the focus on IL plays such an important role, and library personnel do not feel that they have the sufficient foundation for this part of their professional practice.

Training offered

Table 16 Designated training offered

Reply options:

- a credit course locally

- b credit course in other institution
- c in-house workshop
- d workshop in other environment
- e online course
- f job shadowing
- g no designated education/training offered
- h other

	Canada	Norway
Internal credit	5.6	12.3
External credit	4.3	17.9
Internal work shop	38.8	26.5
External work shop	20.5	17.3
Online course	10.9	4.3
Shadowing	5.9	17.9
No training offered	9.9	1.9
Other	4.0	1.9
	100.0	100.0

In both countries the workshop has been the most frequently offered training format, in-house or in another environment. A special feature for the Norwegian survey is the extent of credit courses offered. Recalling the formal educational background facts described in Figure 1, this makes sense. Lacking a graduate level education, more of the Norwegian librarians will find a credit level of continuing education useful.

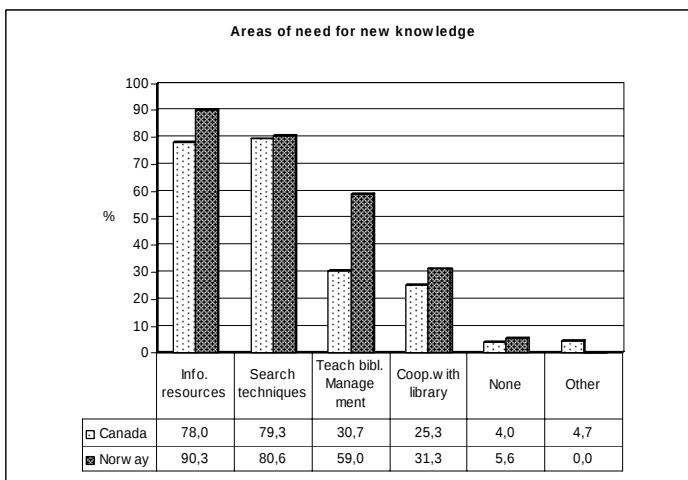
Many of the interviewees reported that their preferred format of training was a workshop with discussion groups or hands-on. Shadowing colleagues was also mentioned as a popular way of obtaining new skills. For library faculty members the networking format of conferences is popular as a means of professional development. To develop teaching skills it may be necessary to take a more formal course.

Teaching faculty

A clear majority indicated a need for developing new knowledge or skills: 77 % in Canada and 80 % in Norway. Figure 9 shows in which areas.

Figure 9 Kinds of training needed. (Respondents were invited to indicate more than one alternative). Reply options:

- a knowledge of available information resources
- b search technique skills
- c skills to teach bibliographical management
- d co-operation with library instructors
- e none
- f other



Not unexpectedly, the highest requirements are ‘knowledge of available information resources’ and ‘search technique skills’, both linked to teaching faculty’s own research practice as well as to their teaching duties.

‘Skills to teach bibliographical management’ are required by almost two-thirds of the Norwegian participants, twice the number of the Canadian respondents. Almost one-third would like to develop their co-operation with library instructors.

Above all, these findings represent a challenge to the academic libraries to develop courses/training and ways of co-operating with teaching faculty.

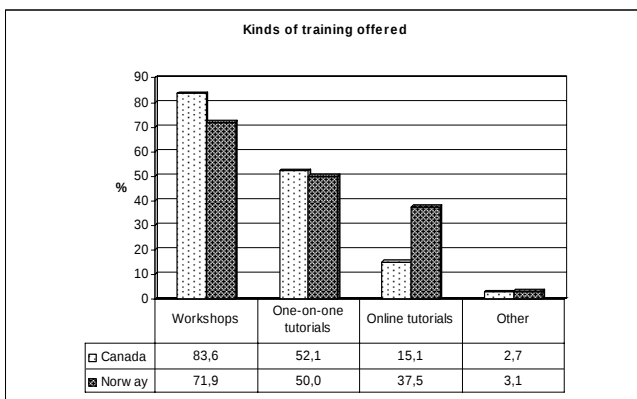
Table 17 Designated training offered?

Has training been offered, and if so, what kind of training?

	Canada	Norway
Yes	49.0	62.8
No	12.1	8.5
Not sure	38.9	28.8
	100.0	100.0

Nearly 40 % in Canada and nearly 30 % in Norway are not sure whether designated training has been offered. Still, as shown in Figure 10, many have noticed that different kinds of training (but not designated?) have been available.

Figure 10 Kinds of training offered. (Respondents were invited to indicate more than one alternative).



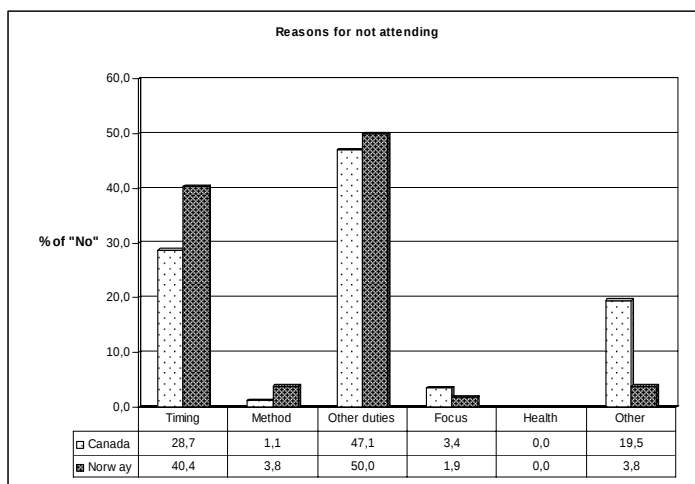
51% in Canada and 72 % in Norway attended the training offered. Those who did not attend gave the following reasons:

Figure 11 Reasons for not attending training (% of “No” replies, Table 17).

Reply options:

- a bad timing
- b instruction method unsatisfactory
- c other duties had to be prioritised
- d subject not interesting
- e health reasons
- f other

That these results indicate that ‘other duties had to be prioritised’ is hardly surprising. In addition, ‘Bad timing’, indicated by approx. 30 % (Canada) and 40 % (Norway), suggests an area where improved coordination between library and faculties might result in higher attendance figures.



Conclusions

There is considerable need for new knowledge and skills training in the wake of library developments. The change processes in academic libraries affect the organisational level as well as the individual employee's everyday work situation. Results from the teaching faculty survey (which has not been included *in extenso* in this paper) show a lack of awareness about library development and practice among teaching faculty. Other indications are that teachers' practices will have direct influence on students' study technique and information seeking, suggesting that these are areas for developing increased information and co-operation.

Information technology is an area where there will be a continuous need for keeping pace with development, best obtained through short courses, workshops and the like. 'Database search knowledge' and 'general electronic resources' are the areas where more than 50 % of the respondents in both countries feel a high demand for training.

In the area of 'information literacy', the questionnaire focus was on development of teaching skills. The Norwegian respondents show greater need for this kind of knowledge. 'Assessment of learning outcomes', 'classroom instruction' and 'one-on-one tutorial' reached the highest score. That was also the case in the Canadian material, but with lower values. In the interviews, 'pedagogy' and 'teaching' were considered the area where people had felt the most obvious need for more focus in LIS university or college education.

A clear majority of the teaching faculty respondents indicate need for developing new knowledge or skills. Training has been offered, but many have not found time to attend. This will be an obvious focus in future co-operation and coordination between library and faculties on training programmes.

Workshops with discussion groups or hands-on is the preferred format of CPD. Shadowing colleagues is another popular way of obtaining new skills. Library faculty members consider the networking in conference surrounding a useful format of professional development.

Job descriptions will to a certain extent keep pace with developments in academic libraries. Not all library personnel have a job description, but the professional requirement may and should be part of the annual professional assessment.

References

- ¹ Roberts, N. & Konn, T. *Librarians and Professional Status: Continuing Professional Development and Academic Librarianship*. London: Library Association, 1991.
- ² Veaner, A.B. *Academic Librarianship in a Transformational Age: Program, Politics and Personnel*. Boston: G.K. Hall, 1990.
- ³ Fagerli, H.M. *En Arena for Læring og Samhandling: Om Bibliotekfaglige og Pedagogiske Utfordringer i Læringscentermodellen*. Oslo: Høgskolen i Oslo [Oslo University College], 2000.
- ⁴ American Library Association. *Presidential Committee on Information Literacy: Final report*. 1989. URL <<http://www.ala.org/ala/acrl/acrlpubs/whitepapers/presidential.htm>>
- ⁵ Bruce, C., Chesterton, P. & Grimison, C. Constituting collective consciousness: information literacy in university curricula. *The International Journal for Academic Development* 2002, 7 (1), 31-41.
- ⁶ Peacock, J. Teaching skills for teaching librarians: postcards from the edge of the educational paradigm. *Paper Presented at the COMLA Seminar 2000, Christchurch, New Zealand 19 – 20 October 2000*. URL <http://www.library.qut.edu.au/infoliteracy/publications/COMLA-2000_Final-paper1.pdf>
- ⁷ Oyston, E. (ed.) *Centred on Learning: Academic Case Studies on Learning Centre Development*. Aldershot: Ashgate, 2003.
- ⁸ Garrod, P. & Sidegraves, I. *Skills for New Information Professionals: The SKIP Project: Final Report*. London: South Bank University, 1997.
- ⁹ Gulbraar, K. *Læringscenter i Praksis: Rapport fra et Studieopphold ved Sheffield Hallam University Learning Centre*. Oslo: Høgskolen i Oslo [Oslo University College], 2000.
- ¹⁰ Association of College and Research Libraries. *Information Literacy: Competency Standards for Higher Education*. 2001. URL <<http://www.ala.org/ala/acrl/acrlstandards/standards.pdf>>

THE CHANGING ROLES OF LIBRARIANS AND INFORMATION PROFESSIONALS: RECOMMENDATIONS FOR CONTINUING PROFESSIONAL DEVELOPMENT AND WORKPLACE LEARNING IN ACADEMIC LIBRARIES

Elvira Basibas Lapuz
College Librarian II
University Main Library
University of the Philippines
Diliman, Quezon City, Philippines
elvira.lapuz@up.edu.ph

Abstract

This study was conducted to determine the effects of technological innovations on academic libraries in the Philippines. Specifically, it sought to examine how these innovations affect the formal organizational structure in the library. It also sought to determine the effects of these changes on human resource management, and on the job requirements, tasks and functions of the library staff. Four academic libraries were included in the study; Ateneo Professional Schools Library, the University of Asia and the Pacific Library, the De la Salle University Library and the Asian Institute of Management Library. A structured questionnaire was used to gather data on library staff opinions regarding the management of change resulting from technological innovations. The number of respondents totalled eighty-six. Findings of the study indicate that changes in organizational structure due to the introduction of technological innovations did take place. The findings also measure the attitude of respondents to the various changes.

Introduction

Libraries are being swept along the currents of rapidly changing technology. While continuing to provide traditional information services, librarians must now develop new skills and assume new roles that are necessary to support technology-based services. A librarian doing collection development tasks must also be concerned with providing access to digitized resources without actually 'owning' the resources. Reference librarians must now have the knowledge and skill in accessing online resources to be able to assist their new clients, the remote access users. Technology has its impact in every facet of library work. It has added several new challenges to librarians in achieving their goal of providing excellent information service. Fulfilling this enhanced mission can be difficult, as most libraries are not positioned for rapid change.¹

Change by its very nature, is unpredictable, inconstant, and often unmanageable. Organizations need to acknowledge this fact and accept that organizational success nonetheless depends upon their ability to predict and control change in some way. It is not healthy for an organization to just await the outcome of the events and to react to change after it has occurred. An effective organization must be prepared to grasp the opportunities, side by side with the threats, by responding proactively to the challenges posed by change. It is a given that change has become a feature of organizational life and attention to both the positive and negative aspects is essential for an appropriate response.²

The effective management of change is fundamental to a successful and productive organization. Yet the inherent unpredictability of the change dynamic often adds to the challenges facing the management. The literature on change management often suggests that

the changes being experienced in the 21st century are altogether more radical than those that occurred in previous centuries. Indeed, according to Handy (1991) in his book *The Age of Unreason*:

We are entering an Age of Unreason, when the future, in so many areas, will be shaped, by us and for us; a time when the only prediction that will hold true is that no predictions will hold true; a time therefore, for bold imaginings in private life as well as public, for thinking the unlikely and doing the unreasonable.³

This is a clear suggestion by the author that changes occurring in today's libraries require not just a change in attitude for library staff it also requires them to see the library in a totally new perspective.

Academic libraries are no longer composed of paper and print collections. Whereas previously libraries were largely storage facilities for books, they have now been transformed into highly sophisticated information facilities. In the Philippines academic libraries are capitalizing on the benefits of the latest information technologies. Taking into consideration the effects of these technologies, library administrators are faced with the challenge of being able to manage the day-to-day activities of the library and of identifying their current and future needs. There are now libraries, especially in highly urbanized areas that have automated their operations. Services are improved by acquiring not only print but also electronic and online resources. There are also initiatives in updating staff knowledge concerning the use of these resources, in order for them to provide efficient and effective services. The effort to improve staff performance is evident in the continuous conduct of seminars, conferences, workshops and training both for the professional and clerical levels.

This changed scenario in Philippine librarianship provided the rationale for this study. The study was undertaken in order to assess the changing nature of academic librarianship in the country. It sought to provide a platform for a discussion on the changes that have occurred and how effectively library staff have adapted to these changes. An outcome of the study is that it provides recommendations based on the changing roles of librarians and information specialists and their need for continuing professional development. It further makes recommendations on the place of workplace learning activities within the library.

Objectives of the study

The objectives of the study were:

1. To find out how the introduction of technology has changed the formal organizational structure of these libraries, as well as the informal dynamics by which library staff members accomplish and coordinate their tasks.
2. To be able to determine the effects of these changes on the identified roles and tasks of professional and support staff of the library.
3. To be able to determine the continuing professional development needs and requirements of library staff owing to these changed roles and tasks.
4. To be able to recommend work-based learning activities for both professional and support staff.

Significance of the study

This study is a presentation of how the members of the academic library staff adapt to changes in the nature of their work tasks and assignments as brought about by the introduction of technological innovations. It explores the strategies and techniques used by library managers to solve the problems following from the changes that occurred in their organization. The findings of this study therefore provide the basis for the recognition that human elements of change are as important as technological innovations. It seeks to

strengthen the argument that “staff training and development are critical to the success of managing change in the library.” Just as important is the evaluation and the impact it has on the staff’s ability to provide quality service. It is believed that human resource development is one of the most important management functions.

More specifically, this study identifies the specific topics to be included in the design of a staff training and development program in terms of perceived importance by the library staff themselves. This will facilitate the development of appropriate training for the library staff to keep them abreast of the latest developments in library and information technologies. It will also assist library managers in determining the current and anticipated needs of the staff to ensure they will continue to provide efficient and effective library services. Results of this study will provide data for library managers to benchmark their future plans and efforts. They can capitalize on the experiences of these libraries that are well advanced in terms of automation and technological innovations when planning for better staff development strategies in their respective libraries.

Research design

This study is descriptive in nature, getting background information from available documents and providing discussion of theories and concepts related to the presentation of the library as an open system and dynamic organization. Employing the descriptive method of research, this study examined the process of technological innovations at the Ateneo Professional School Library, Asian Institute of Management Library, De la Salle University Library and the University of Asia and the Pacific Library to validate the findings in developed western countries concerning the effects of technological change on academic libraries. These academic institutions and their libraries are considered to be among the most technologically-advanced in Metro Manila. Interviews with the chief librarians of the institutions provided information on the more recent developments in their libraries.

The resources of the four libraries were examined, and staff perceptions regarding the use of computers and other technology were evaluated. After examining the institutional settings in which these technological changes occurred, data were collected to assess;

1. the changes in the responsibilities inherent in specific positions,
2. the changes in specialization and skills required for library staff,
3. the changes in decision-making prerogatives and professional duties among the staff.

A survey of staff opinion regarding automation and computerization provided for background information regarding their views, sentiments and attitudes toward change in organizational structure and library management. Data on the perceived training and development needs of each type of personnel was also taken from this survey.

Respondents of the study are the library staff, both professional and non-professional, of the four libraries studied.

Research instrument

Questionnaire. An ‘opinionnaire’ was designed using some items from a study conducted by Peggy Johnson in 1991.⁴ The questionnaire was structured to collect data on library staff’s perceptions of change management, automation and provision of training programs in their respective libraries. The first part provides for the personal backgrounds of the respondents, and the second part focused on staff opinions regarding technological innovations applied in their libraries. These are questions that require respondents to take note of the frequency of occurrence and the actual situations of their libraries. The third part of the questionnaire lists topics that might be included in a training and development program, and

respondents were asked to rank their importance taking into consideration their individual needs.

Interviews. Two of the chief librarians from the four libraries were asked to participate in an interview schedule designed to strengthen the validity of the data gathered using the questionnaire.

Data collection

To collect data for this study, the questionnaires were collected several days after they were distributed to the library staff of the four institutions. The Chief Librarians had been requested to distribute the questionnaires to their library staff. Since the population under study was relatively small, the study aimed for a one hundred percent (100%) rate of return, but circumstances did not allow for this. Reasons cited for the non-return or non-completion of questionnaires included that staff were:

- attending a training/seminar/conference,
- too busy during the time of the survey,
- not willing to answer any questions about his/her work at the library.

Findings, conclusions and recommendations

The findings of the study were based on the results of the questionnaires answered by the respondents. To present the frequency distribution, percentage and rank, descriptive statistics was used. The chi-square was used to test relationship of the variables.

The following are the findings of the study:

Based on the interviews conducted with the two Chief Librarians, they identified the major changes in their libraries as either organizational or technological. Organizational changes are those concerning hierarchy and distribution of tasks within the library. Specifically, these are the changing organizational structure requiring the creation or abolition of certain section or departments or merging with other units within the institution. Technological changes are those information technology enabled innovations such as integrated library systems, access to electronic and online information sources, etc. These innovations have resulted in changes to the nature of tasks and functions preformed by staff.

When asked how the staff responded to these changes and how easily these changes have been accepted, responses revealed that organizational changes had been harder to cope with. Interview with one of the Chief Librarians confirmed this observation. According to her, extra efforts were exerted to put an emphasis on the rationalized and harmonized organizational structuring. As a manager she had to ensure that those affected by these changes are able to cope and continue to be effective and efficient members of the library staff.

When asked to rate their library's progress towards automation the majority of both the professional (27 or 67.5%) and support staff (33 or 71.4%) thinks that the pace is 'just right'. This implies that library staff do not see the changes resulting from automation as being unmanageable and that they are able to keep pace with these changes. A majority of both professional (38 or 95%) and support staff (35 or 76%) believe that technological innovation 'leaves people more free to be creative'. This again indicates a positive perception from the staff with regards to the changing nature of the academic library and suggests that they see it as an opportunity to find new methods and techniques to adapt to the changing nature of their tasks in the library.

There have been changes in the formal organizational structure of the libraries included in the study. Data gathered from the interviews of the two Chief Librarians revealed that although there are no major changes in the hierarchical structuring within the library,

evidence of increased coordination with other departments – for example, the IT department - is clearly present. A slight majority of the respondents (50 or 58%) think that these changes are created by the technological innovations introduced in their libraries. These observations were validated by the Chief Librarians. Specific examples include the introduction of an integrated library system which created a more interlinked distribution of tasks and functions in both the technical and user services division of the library.

In the respondents' opinion, the cataloging aspect of library work benefited the most from technological applications. According to one of the Chief Librarians the technical aspects of library work received the most benefits from the electronic and online information sources. Specific examples included the use of electronic and online bibliographic tools and integrated library systems. According to the two Chief Librarians, the libraries have become increasingly involved in decision making with regards to the various technologies introduced to the library. The academic library has been working in close cooperation with the information technology unit of the University, although no convergence or merging had occurred.

The opinion of the library staff that there were changes in the library organizational structure was further validated with the responses taken during the interview wherein Chief Librarians described the changed organizational structure of the library. They presented a picture of a library with a leaning towards a flatter or more horizontal organization, with lesser number of middle managers. In the past, libraries have tended to a very hierarchical structure. This no longer holds true, at least for the academic libraries studied that were described as moving towards a flatter structure.

A majority of both the professional (37 or 92.5%) and support staff (40 or 87%) believes that technological innovations create changes in the nature of their tasks and functions. These include changes in the manner of task performance, i.e. from manual to automated, tasks such as bibliographic searching, materials processing, circulation procedures, bibliographic searching, access to information sources, etc. Because of automation, there had been an increase in the clarity of communication and coordination in all the managerial levels and the different aspects of library work. There has been an increased clarity of communication between the clerical and middle management staff, between the middle and upper management staff and the technical and readers' services staff. When asked about the staff level of involvement in decision making concerning the incorporation of technological innovations in their library, forty nine (49 or 57%) of the respondents said that they are involved in decision making while thirty seven (43%) are not involved at all. A substantial majority (74 or 86%) believes that library staff should be more involved in decision making. Specific instances requiring staff consultation were said to include decision-making regarding equipment to be added to the library and decisions on which information sources will prove to be cost effective.

According to the Chief Librarians interviewed, there have been changes in the requirements for library staff. Sound computing knowledge is now essential. Even those who had been with the library for some years and were considered experts in all the manual procedures are expected to learn and be able to use newly introduced electronic devices. When staff were asked about the effect of technological innovations on their work performance, the results reveals that a majority of library staff think that these innovations create positive effects on their work performance. They cited positive outcomes such as computers making their work easier, and faster and more accurate work production and accomplishments. When asked about learning new technologies, the respondents again, gave positive answers. A clear majority of both professional (37 or 92.5%) and support staff (38 or 83%) 'look forward to learning' new technologies.

Findings also revealed that a majority of the respondents have benefited from training provided by their libraries. Respondents reported that the adequacy and quality of training can be described as ‘adequate’ and ‘very good’, respectively. When asked how they prefer to learn to use new technologies, answers such as ‘in a structured class’ and ‘workshops’ dominated the responses. The majority of the respondents believe that there is a ‘great need’ for training for all the topics on skills development enumerated as:⁵

1. web page creation
2. use of electronic resources
3. computer hardware
4. computer software
5. information networks i.e., Internet
6. library integrated systems
7. word processing i.e., MS Word
8. spreadsheets, i.e., MS Excel
9. presentations i.e. MS PowerPoint
10. database creation i.e., MS Access
11. basics of personal computers

A majority of the respondents believe that there is a “great need” for training for all the topics on personal development enumerated as:

1. diversity in the workplace – understanding employees
2. performance appraisal
3. coaching and mentoring
4. building teamwork
5. total quality improvement
6. safety and disaster preparedness
7. housekeeping
8. how to build office morale
9. motivating employees
10. interpersonal communications
11. written and oral communications
12. time management
13. planning and organizing
14. handling complaints and grievances
15. decision making and empowerment
16. leadership styles - applications

Based on the assumption that the four libraries included in the study are among the more technologically-advanced learning institutions and applying the technological innovations in their day-to-day activities, this study arrived at the following conclusions:

1. The Chief Librarians interviewed presented their views regarding a horizontal or flatter structure that provides for more efficiency and effectiveness. These were evident in the unchanging number of managerial levels in the present library structure. Through this structuring, redundancies were eliminated in order to be more responsive to the changing needs and create opportunities for continued learning and skills development.
2. The importance of communication and thorough orientation cannot be over-emphasized in order to maintain a properly functioning organization. This is more important during times of change when people feel uncertain and

- insecure. A good communication between managers and staff is a significant factor in the effective management of change.
3. Library staff members were positive in their views on the introduction of new technological innovations in the library. They also welcomed the ideas of the changing nature of library work.
 4. Library staff looked forward to learning new technologies in the workplace.
 5. Library staff wanted to be more involved in decision-making with regards to the introduction of new technologies in the library.
 6. The topics enumerated for inclusion when developing training for skills and personal developments were all considered to be of great importance.

Based on the findings of this study and from the available literature related to the study, the author recommends the following:

1. Library managers should be aware of the changes occurring in their library, whether it is organizational or technological. They should be cognizant of the effects of these changes to the organizational structure and the nature of tasks and functions of the library staff.
2. In order to implement change efficiently, managers should be able to prioritize the needs of their staff with regard to job satisfaction, motivation, and job design and requirements. Limitations include restrictions brought about by the very nature of library organizational structures that are by nature too rigid and bureaucratic. This is one of the reasons why a flatter or a more horizontal structure is recommended for an academic library setting. This kind of structuring is more flexible, giving the staff the opportunity to be more creative in the performance of their duties and consequently be more productive members of the organization.
3. Better understanding of the concept of the learning organization culture will help library managers in their efforts to manage change in the library. It answers the challenge of continued excellence in the face of constant change. A learning organization is an organization that continually provides for innovations and can recreate itself as the needs of its clientele change.
4. Based on the responses given, library staff welcomed the idea of continued learning and actually considered all the training topics enumerated to be of great importance. This was one concrete basis for the development of a comprehensive training program for the library staff.
5. Library managers should investigate the possibility of providing work-based learning activities for the staff in order to ensure that efforts are being exerted in enhancing skills and personal development of the staff. A good discussion of the different work-based learning activities is included in the work of Barbara Allan, including such activities as mentoring, benchmarking, coaching etc.⁶
6. Follow-up studies are recommended in the specific areas. These include organizational structuring; the exact nature of new tasks and functions brought about by the introduction of technological innovations in the academic library; the identification of specific training needs of both the professional and support staff, and the development of training modules and work-based learning.

References

- ¹ Cargill, J. & Webb, G. M. *Managing Libraries in Transition*. Phoenix: Oryx Press, 1988.
- ² Gallacher, C. *Managing Change in Library and Information Services*. London: ASLIB, 1999.
- ³ Farley, T., Broady-Preston, J. & Hayward, T. Academic libraries, people and change: a case study of the 1990s. *OCLC Systems and Services* 1998, 14 (4), 151-165.
- ⁴ Johnson, P. *Automation and Organizational Change in Libraries*. Boston: G.K. Hall, 1991
- ⁵ Allan, B. *Training Skills for Information and Library Staff*. London: Library Association Publishing, 2000.
- ⁶ Allan, B. *Developing Information and Library Staff Through Work-Based Learning: 101 Activities*. London: Library Association Publishing, 1999.

EDUCATIONAL TECHNOLOGY: HARNESSING NEW TOOLS TO SUPPORT INFORMATION LITERACY

Corinne Laverty

Head, Education Library,
Queen's University,
Duncan McArthur Hall, Kingston
Ontario, K7L 3N6, Canada
lavertyc@post.queensu.ca

Abstract

Educational technology is changing the face of teaching and learning. It can play a stimulating role within a single class or it can provide the mechanism for delivering an entire course. The exploration and adoption of new technologies offers librarians an opportunity to evolve their role. Librarians are logical contributors in the development of project work in which electronic resources and learning tools are required. Librarian expertise in the digital environment spans a complex array of scholarly resources, learning objects, and Web documents. Instruction librarians are at the forefront of information technology and are ideally suited to participate in new institutional experiments with educational technology. Digital learning resources must be selected and organized. Methods of access to online journals, electronic collections, and multimedia must be developed. New types of assignments that foster active learning and collaboration must be invented. Ways of creating and delivering information literacy resources must be created. This paper describes how librarians can use their knowledge of information and educational technology to enhance their involvement in curriculum development. The primary goal of this participation is to foster information literacy. Some scenarios are simple and require little investment. Others require full partnership as a course designer where information literacy objectives align with course goals.

Librarian engagement in the learning enterprise

Over the past 30 years, the work of librarians has mirrored the evolution of our understanding of learning. Interest in learning theory in the 1970s encouraged librarians to build rich collections to address specific teaching and learning objectives. Emphasis on learning also highlighted the educational role of the librarian and in the 1980s the concept of information literacy was born.¹ Evolution of our teaching role was stimulated by public access to the Web in the mid 1990s. One stimulus was the change resulting from the information explosion. Apart from the sheer volume and rate of information production, the second spur was the creation of new forms of digital information and the tools by which they are accessed. A third motivation resulting from the extent of information resources, their diversity, and their accessibility, was in the evolving concept of information and media literacy and the notion of 'learning to learn'. A fourth change appeared in the field of education with the development of new methods for teaching and learning arising from increased access to digital information, new forms of educational technology, and our understanding of the processes of learning.

There is more to learn and less time in which to learn it. In a comprehensive analysis of the world's entire sphere of data, researchers at the University of California at Berkeley ² estimate that the entire history of humanity accumulated 12 exabytes of information (1,000,000,000,000,000,000 bytes). Today, 12 exabytes is produced every 2.5 years making the need to understand how to locate information using effective research strategies more

important than ever. Librarians are expected to select, organize, and manage digital resources; they know where and how to find information, regardless of format or content. Information seekers turn to us when they are confused by the plethora of available databases and by Web searches that produce inaccurate and unscholarly results. Need a video, an mp3, an audio file, a photograph, an image, articles from scholarly, popular or news sources, a learning object, a reliable website, a listserv, an e-book? We are now master caretakers of the nebulous virtual library in addition to the traditional physical collection. Our methods and interfaces for connecting people with resources have diversified. Today we use educational technologies to offer course-integrated information literacy development, interactive tutorials, and virtual reference.

Apart from managing the sheer quantity and diversity of information, we must also simultaneously assist learners in understanding the breadth and depth of what's available. Information literacy has evolved to include media and computer literacy, awareness of new forms of digital information, and the tools by which they are accessed, and methods for managing, producing, and sharing information. Educators in the 1990s identified information literacy as a foundation for learning in an environment where students need to engage with information as part of their formal learning process.³ The hallmark of a good education was once the understanding of a body of knowledge, but today it is the skills of analysis, evaluation, and synthesis that are critical for sense-making in our vastly resource-rich world. Despite the ocean of information confronting us there is no assurance that it can be found or understood, or that we will learn from it. With the growing need for lifelong learning in our society, universities are also entreated to engage students in research in as many undergraduate courses as possible - essentially reinventing the learning process.⁴ Movement towards a new model of learning that explores how students might engage with their teacher, with one another, and with learning resources in a rich and complex networked environment poses a new challenge in higher education. In effect, we have *all* become students again; the process of learning itself has become a focus of education and is coined by the phrase 'learning to learn'.

Supporting information literacy through educational technology initiatives

The driving force behind adoption of educational technologies in universities is the belief that they will enhance learning.⁵ Educational or learning technology is defined as the use of computerized information and communication tools in teaching and learning. Librarians can evolve their teaching role by collaborating with faculty to introduce learning technologies in courses, in either face-to-face or online modes. Survey results of how university faculty use technology in their teaching⁶ suggest that many instructors are just beginning to establish patterns of how they structure and organize course materials on the Web. The time is right for librarians to offer assistance in using educational technologies to maximize access to digital resources and to re-introduce the need for teaching the research process in the nebulous information environment. There is a need to build a library presence within course websites, to identify multimedia and assignments that enrich learning environments through active collaborative participation, and to embed information literacy development through new learning structures, including the Learning Commons concept and in online distance courses. The Learning Commons is an accessible, collaborative space where people pursue and share ideas. This enriched learning environment brings together tools, resources, and support for the academic experience of students. The dedicated space unites people who assist students through individual consultation, workshops, peer mentoring, and collaboration, and it includes improved support for accessing and exploring digital resources and technology.

Introducing educational and information technologies across the curriculum.

There are various approaches open for academic librarians seeking to introduce educational and information technologies to enhance information literacy development across the curriculum. Approach 1 is about *creating a library portal on web course page*. The first stage is to review the course home pages at your institution. Students in both on-campus and distance courses benefit from a library presence on these sites. Without a portal to institutional resources, students tend to google. They prefer the Web as an information source because it offers seductively easy access to apparently high-quality full-text resources and requires no learning of specialized library tools. Carlson⁷ records the observations of a history professor at Furman State: “Students have this idea that there is no difference between searching on the Web and searching in the library”. This faculty member names librarians as the “new allies in the fight against research by googling”. He recommends creating a library portal on course web sites that includes descriptions of key tools in the discipline, links to databases, electronic reserve readings, bibliographies, help guides (e.g. citation style), and contact information for the librarian specialist in that area. According to another professor of Web design technology, “The library is really good at vetting and organizing published content, while the educational-technology groups work with faculty with their unpublished content. And yet students need both at their fingertips. We don’t want them just going to google”. Courseware developers should provide a section for adding library-related information to every course page to promote library connectivity to classroom learning and project work.

Some instructors attempt to counteract the google phenomenon by providing links to ‘electronic reserve’ journal articles and full-text websites. However, if the links are the sole complement of learning materials for the course then the opportunity for information literacy development is lost. In limiting the information-finding experiences of students for the sake of convenience, instructors fail to teach students how to select and evaluate sources appropriate to their needs. This precludes student skill development by not engaging them in the independent search for relevant learning materials.

The second approach is concerned with *designing online interactive information literacy modules*. The act of making a library portal on course Web pages may encourage student use of research tools. It should be acknowledged, however, that learning to use these resources effectively in the context of assignments necessitates information literacy development and not just the provision of web links. This highlights another venue by which librarians are using educational technologies to foster information literacy development.

Ten years ago librarians used the adage ‘garbage in, garbage out’. Electronic searches match the words of the query and depend entirely upon the language of the user. Today this phrase is replaced with ‘garbage in, gospel out’, signalling the commonly held misperception by students that computers are adept enough or big enough to find relevant matches regardless of the unsuitability of the initial query. Librarians must continue to educate themselves in the best mechanisms for using new information tools and pass this knowledge on to others so that the wealth of information at our disposal can be tapped effectively and efficiently. Online modules on research strategy, mining the invisible Web, searching specific subject databases, and citation management and style should be linked to course pages. Today’s students prefer software that offers interactivity, visual as opposed to text-based presentation, and sound and video. Librarians should make use of programs that offer these features. Examples include RoboDemo, ScreenCam, Camtasia, Viewlet Builder, and Flash. Distance learners are in special need of access to information literacy tutorials. It is unfortunate that links to electronic journal articles and web pages are sometimes the only resources offered in virtual classrooms. To empower distance learners with independent research skills, librarians are crafting interactive tutorials in relation to course curriculum. Johnstone and Krauth⁸ list a number of

modules that highlight conceptual frameworks within the research process and promote understanding of academic research and the tools that support it.

The third approach is to *collect and organise multimedia materials*. A focus on teaching quality in higher education has arisen in the past two decades; evidence the rise of instructional development centres on North American campuses. One activity in these centres is to spotlight teaching methods that enhance student learning. One student-engaging approach is the use of materials that prompt participation and address a range learning styles. Such content can be as simple as a video or as complex as an online simulation. Librarians who specialize in multimedia collection are developing another avenue for improving collaboration in the classroom. A library website can identify sites and search techniques to find: videos in the library and on the Web (e.g. Open Video Project); libraries of primary sources (e.g. Library of Congress American Memory Collection, Early Canadiana Online); image libraries (e.g. Smithsonian Institute; Images Canada); audio collections (e.g. Canadian Broadcasting Corporation Archives); webcasts; and learning objects such as:

- MERLOT (Multimedia Educational Resource for Learning and Online Teaching): <http://www.merlot.org/>
- CLOE (Cooperative Learning Object Exchange): <http://lt3.uwaterloo.ca/CLOE/>
- CORIL (Cooperative Online Repository for Information Literacy): <https://ospace.scholarsportal.info/community-list>
- PRIMO (Peer-Reviewed Instructional Materials Online Database): <http://cooley.colgate.edu/dbs/acrlprimo/showrec.html>

The fourth approach can be to *contribute to and use information literacy repositories*. Learning object repositories are a recent addition to the array of educational technologies. A learning object is defined by the Co-operative Learning Object Exchange (CLOE) as: “any digital entity designed to meet a specific learning outcome that can be reused to support learning” (http://learnware.uwaterloo.ca/projects/CCCO/cloe_about_def.html). Some learning object repositories cover all disciplines while others specialize in information literacy such as PRIMO in the United States and CORIL in Canada. The advantage of a repository is that an instructor or librarian can download existing resources and adapt them to the local environment. Objects in CORIL are peer-reviewed and include interactive tutorials for specific assignments, databases, and courses. Examples include an interactive tutorial for a social work assignment at Ryerson University in Toronto Ontario; a self-directed course workbook for graduate rehabilitation students; and a video on assignment design for faculty.

Partner with an instructional development centre provides the fifth approach. Instruction librarians are well positioned to contribute to learning strategies in the classroom and should explore partnerships with campus teaching centres. They often have teaching experience with both small and large classes in face-to-face and online environments. They design research assignments that support good pedagogy and develop lifelong learning skills in students. They identify learning materials including scholarly works, images, photographs, primary sources, news articles, statistics, artefacts, Web pages, videos, music, simulations, virtual field trips. They create Web pages, interactive tutorials, and use course design tools and listservs. Librarians often practise active learning techniques and test new methods of engaging students. They provide email consultation and virtual reference. Taken as a whole, the breadth and depth of this background make them ideally suited to participating in new institutional experiments in the design and application of educational technology. Local teaching centres would benefit from librarian participation in workshops such as assignment design and assessment, information literacy development, and using multimedia in the classroom.

One form of faculty-librarian collaboration at Queen's University is the participation of a librarian in a faculty position called a Learning Technology Faculty Associate (LTFA). The role of the LTFA is to facilitate the critical and effective use of educational technology in the learning environment at Queen's. A librarian held this position with four faculty members over several years and had the opportunity to:

- collaborate with colleagues to use educational technology in their classes,
- engage more sceptical colleagues in exciting new technology initiatives,
- advocate for greater institutional support for educational technology in the curriculum,
- offer workshops and programs that develop skills with new learning technologies,
- research the effectiveness of teaching and learning with technology.

Becoming part of a *learning technology team* is another approach. Learning Technology Teams (LTT) at Queen's University provided an opportunity for librarians to contribute to short-term learning technology projects.⁹ The LTT is a group of individuals with different areas of expertise that provide support to a faculty member as he/she integrates technology into a specific course. Team membership brings together instructors, librarians, instructional designers, technical support personnel, and other faculty members who have successfully used technology in their teaching to support the use of technology in a specific course. The goal of the team is to enhance the learning environment in student courses through identification of teaching and/or learning challenges. Each member brings a specialty to the table. The faculty member brings in-depth subject expertise. The instructional designer brings knowledge of how pedagogical tools can be used to achieve desired learning outcomes. The librarian has an understanding of information resources and the electronic tools for accessing them and is practiced in collaborative enterprise through work with faculty and students on a daily basis in the interpretation of research requests.¹⁰ Technical support people are experts in specific hardware and software and often bring a broader knowledge of the range of technological tools that could be applied to instruction.

One Learning Technology Team at Queen's helped a professor introduce educational technology in a second-year Shakespeare class of 100 students. The course followed Shakespeare's development as a dramatist through careful reading of 12 plays in relation to social, historical, and intellectual contexts. The librarian was the project leader and introduced a range of new learning tools: a virtual tour of the Globe theatre; videos of modern stagings of several plays; audio files on the Web of selected speeches; a library portal to research tools and guides; photographs and images on the Web reflecting theatre practice and costuming variation; and PowerPoint slides as a tool to organizing these features during lectures.

Learning commons projects are also an alternative and provide approach 7. In response to the impact of electronic information and the need to support scholarly use of information resources, many academic libraries are developing a Learning Commons. The Commons offers another venue to connect information literacy to the student learning experience. A Commons model that goes beyond straightforward access to technology to focus on learning with technology invites partnership with other campus units that provide support across the research continuum. Writing centres, technology units, learning strategies groups, and special readers' services for those with learning and physical disabilities provide help at various points during assignment completion. Bringing related services together offers an integrated learning environment where use of information technology is enhanced through formal and informal instruction programs and reference assistance.

The final approach is concerned with *online course development*. Further along the continuum of involvement with educational technology is participation in online coursework.

Collaborative multidisciplinary teams are not yet recognized as the preferred means for exploring educational technologies in higher education. However, several American institutions use a faculty-librarian-staff team model and have found them to be highly successful. There are several noteworthy examples of in-house teams that include librarians on curriculum projects that use educational technology, including online course components.⁹ At Indiana University Purdue University Indianapolis (IUPUI), instructional teams are spearheaded by the university libraries and involve “a collaborative effort led by a member of the teaching faculty working with a librarian, a technologist, a counsellor, and a student mentor”.¹¹ The Jumpstart program at the University of Southern California involves project teams with instructional technologists, librarians, and other technology professionals.¹² Arizona State University employs multidisciplinary development teams to support faculty in their efforts to develop multimedia or Web instruction. UWired at the University of Washington¹³ draws on collaborative teams to provide access to the tools and resources needed to use technology to enhance teaching and learning; promote fluency with information and information technology; and to foster innovation in technology-enabled teaching and learning.

At Queen’s University a course called ‘Teaching and Learning in an Online Environment’ was co-designed by a librarian and an educational advisor. This online course was devised for faculty who intend to teach online and demonstrates how course work, information literacy, and the building of learning communities all support one another in the virtual learning environment. Librarians can encourage a resource-rich environment rarely occurs without their direct involvement in the planning and development of online courses. This collaboration is crucial for a web-savvy generation of learners because it teaches course content using information-related tasks that go beyond googling and expose the multitude of rich text and multimedia in the invisible web of library resources.

Evolving our role to remain relevant with digital natives

To remain relevant to the next generation of learners, librarians must address difficult questions: What societal changes are being driven by new technology? How do we shape our role and our information systems to best serve our users? Marc Prensky¹⁴ characterizes today’s students as digital natives. The natives want to:

- receive information really fast (at twitch speed),
- parallel process and multi-task,
- see graphics before their text,
- access information randomly whenever and wherever they are,
- network and be connected to others,
- have instant gratification and frequent rewards,
- have all information systems to work like Google.

With fewer students coming to the library, the library must go to them. Whether by course page, virtual help, online tutorial, or embedded information tasks, librarians must be proactive in reaching today’s learners. Although we are digital immigrants who speak with an accent, we can experiment with educational and learning technologies to reach out to the Net generation. The President of Johns Hopkins University recently described the critical function of librarians: “Massive information overload is placing librarians in an ever more important role as human search engines. They are trained and gifted at ferreting out and vetting the key resource material when you need it. Today’s technology is spectacular — but it can’t always trump a skilled human. Have you hugged your librarian today?”¹⁵

References

- ¹ Lavery, C. *Resource-based Learning: Gateway to Information Literacy*. Ph.D. dissertation, University of Wales, Aberystwyth, Wales, U.K, 2000.
- ² Lyman, P. & Varian, H.R. School of Information Management and Systems at the University of California at Berkeley. *How Much Information?* URL <<http://www.sims.berkeley.edu/research/projects/how-much-info/>>
- ³ Bruce, C. S. *Information Literacy as a Catalyst for Educational Change: A Background Paper*. White Paper prepared for UNESCO, the U.S. National Commission on Libraries and Information Science, and the National Forum on Information Literacy, for use at the Information Literacy Meeting of Experts, Prague, The Czech Republic. URL <<http://www.nclis.gov/libinter/infolitconf&meet/papers/bruce-fullpaper.pdf>>
<<http://www.nclis.gov/libinter/infolitconf&meet/papers/bruce-fullpaper.pdf>>
<<http://www.nclis.gov/libinter/infolitconf&meet/papers/bruce-fullpaper.pdf>>
- ⁴ The Boyer Commission on Educating Undergraduates in the Research University (1998) *Reinventing Undergraduate Education: A Blueprint for America's Research Universities*. State University of New York at Stony Brook: Carnegie Foundation for the Advancement of Teaching. URL <<http://naples.cc.sunysb.edu/Pres/boyer.nsf/>>
URL <<http://www.jhu.edu/gazette/2004/06dec04/06brody.html>>
- ⁵ Bates, A. W. *Managing Technological Change: Strategies for College and University Leaders*. San Francisco: Jossey-Bass, 2000.
- ⁶ Learning Technology Faculty Associates *Queen's Faculty Survey on Educational Technology*. Kingston: Queen's University, 2000.
- ⁷ Carlson, S. New allies in the fight against research by googling: faculty members and librarians slowly start to work together on courseware. *The Chronicle of Higher Education* 2003 URL: <<http://chronicle.com/free/v49/i28/28a03301.htm>>
- ⁸ Johnstone, S. M. & Krauth, B. (2002). *Information Literacy and the Distance Learner: White Paper Prepared for UNESCO, the U.S. National Commission on Libraries and Information Science, and the National Forum on Information Literacy, for use at the Information Literacy Meeting of Experts, Prague, The Czech Republic*. URL <<http://www.nclis.gov/libinter/infolitconf&meet/papers/johnstone-fullpaper.pdf>>
- ⁹ Lavery, C., Leger, A., Stockley, D., McCollam, M., Sinclair, S., Hamilton, D. & Knapper, C. Enhancing the classroom experience with learning technology teams. *EDUCAUSE Quarterly* 2003, 26 (3), 19-25.
- ¹⁰ Raspa, D. & Ward, D. Listening for collaboration: faculty and librarians working together. In: Raspa, D. & Ward, D. (eds.) *The Collaborative Imperative: Librarians and Faculty Working Together in the Information Universe*. Chicago: Association of College and Research Libraries, 2000: pp.1-18.
- ¹¹ IUPUI University Libraries (1999). *IUPUI Instructional Teams*. URL <<http://www-lib.iupui.edu/itt/>>
- ¹² University of Southern California (1995). *Jumpstart: Assistance Program for Curricular Technology*. URL <<http://www.usc.edu/isd/locations/cst/jumpstart/>>
- ¹³ University of Washington (2001). UWired. URL: <<http://www.washington.edu/uwired/>>
- ¹⁴ Prensky, M. (2001). *Digital Natives, Digital Immigrants*. URL <<http://www.marcprensky.com/writing/default.asp>>
- ¹⁵ Brody, W. R. Thinking Out Loud. *The Johns' Hopkins University Gazette* 2004, 36 (14). URL <<http://www.jhu.edu/gazette/2004/06dec04/06brody.html>>

THE BESPOKE APPROACH TO DEVELOPING AND DELIVERING ONLINE STAFF DEVELOPMENT

Lindsey Martin

Academic Liaison Co-ordinator, Learning Services
Edge Hill College of Higher Education
Ormskirk, Lancashire, L39 4QP. UK.
martinl@edgehill.ac.uk

Abstract:

The library at Edge Hill has been closely involved with the institution's virtual learning environment (VLE), WebCT since its introduction in 1999. Early library activity with WebCT focused on collaborating with learning technologists and academics to embed electronic resources, and support students through the Help Desks. Ongoing involvement has resulted in the library, now part of a converged Learning Services, creating a suite of online staff development modules. This paper will describe how an e-learning ethos has been engendered within the service. It will also describe the suite of online courses available to Learning Services staff, explaining why bespoke online courses were created. It will describe the underpinning pedagogy and the process of developing and delivering these courses in a way that ensures that the technology adds value to the learning. The paper will use the most recently developed online module, Customer Care, as a case study. This module provides a context-rich, theoretical and practical grounding in customer care for staff in a converged service. The case study will describe the beta testing of the module and the learner feedback. It will consider the future challenges for e-learning support and development within the department.

Introduction

The Library at Edge Hill College has been closely involved with the institution's virtual learning environment (VLE), WebCT since its introduction in 1999. Early library activity with WebCT focused on collaborating with learning technologists and academics to embed electronic resources, and support students through the Help Desks. Ongoing involvement has resulted in the library, now part of a converged Learning Services, creating a suite of online staff development modules. A strategic approach was established to harness the potential of WebCT as a tool for developing, delivering and supporting teaching and learning within the service. This has from the earliest days seen WebCT used as the medium for delivery of staff training and development because according to Salmon,¹ those designing, delivering and supporting online courses need to experience first hand the 'pitfalls and potential' of the online medium in order to create an effective learning experience.

This paper will describe the suite of online courses available to Learning Services staff. It will explain why bespoke online courses were created rather than buying 'off the shelf' and it will describe the underpinning pedagogy and the process of developing and delivering these courses in a way that ensures that the technology adds value to the learning. The paper will use the most recently developed online module, Customer Care, as a case study. This module has won the Accessing Lancashire Library and Information Services (ALLIS) Staff Development Award for 2004.

E-learning and UK higher education

Technology has transformed the information landscape and the way that learning is facilitated and experienced. Higher Education institutions today cannot afford to be without their Virtual Learning Environments, online databases, electronic journals and eBooks. For the most part, these are no longer considered to be 'new' technology. Perceived pedagogical advantage, the rapid growth of distributed forms of learning and more cynically, the hope of gaining a competitive advantage in the Higher Education marketplace are among the many drivers that have brought about this change.

There is no doubt that Colleges and Universities are rich in technology and this has resulted in high expectations that academic staff and students will engage as early as possible in their academic careers with that technology, using it as a tool for both communicating and learning. In return, academics and students have high expectations of what the technology can do for them. There is a clear 'skills gap' in the space between the ability of academics and students to use technology and their expectations and furthermore, there is, according to Gilbert,² a widening gap between these expectations and the resources and services available to support them, to the extent that he describes it as a 'support service crisis'.

Despite the growing numbers of students who own computers and their general familiarity with information technology, the available research suggests that the majority have not yet developed the necessary e-literacy skills that will enable them to learn in this information age.^{3,4} Access to technology is not the same as understanding, which requires cognitive skills that extend beyond information skills to include communication and an adaptation to learning online. Their development is dependent upon staff at all levels in library and information services being able to offer support, services, training and resources, all at point of need, regardless of time and place.

While there is little consistency in how academic library and information services have adapted to and developed e-learning initiatives, many staff across the profession are becoming increasingly involved at all levels, for example, in the discovery and embedding of electronic resources, design of materials, face to face support via help desks, e-support and e-tutoring.⁵ As traditional library and information roles are changing, information professionals are undertaking work that bears little relation to their professional training. The wide-spread acquisition of these new skills and knowledge must therefore be consciously planned for staff at all levels and at every stage of their working life,⁶ along with the promotion of an e-learning ethos that accepts 'cultural change, professional identity and boundary crossing'. The remainder of this paper describes the strategies adopted by Edge Hill's Learning Services to develop an e-learning ethos and skills in a wide range of staff and focuses upon the newly developed online Customer Care module as a case study.

The Edge Hill context

Edge Hill College of Higher Education is a higher education institution in the north-west of England, with over 9,000 students on a range of degree and diploma courses and a further 6,000 on continuing professional development courses, the majority of which are in education and health-related areas. Edge Hill has strong centralised academic support structures, enhanced by the formation of the Learning Services department in 2003. This large department now offers a converged service consisting of learning resource centres, learning support, ICT user support for teaching and learning, media services, e-learning development, study skills and dyslexia support. The administration, development and support of WebCT are, therefore, managed within Learning Services with the staff working closely with academic colleagues.

The portfolio of teaching and learning programmes at Edge Hill has developed rapidly over recent years. Investment in the development of online teaching and learning has occurred and resulted in delivery both on and off site. WebCT was initially used to deliver a single course, the Postgraduate Certificate in Teaching and Learning in Clinical Practice, which was delivered fully online. Since then, the institution has adopted an incremental rather than a 'big bang' approach to the adoption of WebCT, relying on those 'early adopters' and champions of e-learning to spread the word and showcase what can be achieved. Nevertheless, the rate of expansion of WebCT courses has been considerable and has largely been used to support a blended learning approach. Currently, a total of 400 courses and modules are being delivered across the curriculum, with approximately 8,500 registered users.

E-learning and staff development

The development of WebCT within the institution has coincided with the worldwide expansion of electronic book and journal publishing. The potential for integrating electronic resources within WebCT has had a huge impact on staff in learning support roles in their identification and purchase of appropriate e-resources and in provision of support and training for students. At an early stage, the service recognised the importance of WebCT and e-resources and their likely impact on staff roles across the department. While staff in learning support and learning technology were heavily involved in these developments and were moving towards a multi-professional team model of working, it was clear that the impact would extend to staff providing front-line support on help desks and through off-campus support services.

Initial staff development and training of Learning Services staff was ad hoc and attendance was voluntary, attracting only the early adopters of the new e-learning technology. Training sessions delivered ranged from general awareness raising, Help Desk troubleshooting and password changing to writing and designing materials. It soon became apparent, however, that while staff found the sessions enjoyable and they were well attended, they did not address the issue of all Learning Services staff having awareness of this new medium. Nor did they provide an experience of online learning or WebCT. In order to do this, it was recognised that it would be necessary to embed the use of WebCT into the everyday working practices of all Learning Services staff and to harness WebCT as a vehicle for delivering staff development relating to online learning. This solution was adopted because according to Salmon, "for staff development to be successful, training needs to be rooted in the peculiarities and requirements of the online environment itself" and "if your staff cannot easily navigate, interact, find what they need and fully participate, feel friendly and enthused by your VLE ...why would they expect the students to feel differently?"⁷

Supporting Learning Services staff with their e-learning role would, therefore, start from the first day of their appointment, irrespective of their job role. A staff development life cycle approach has been developed within Learning Services and provides e-learning opportunities at appropriate stages of the cycle. All staff are expected to reach a baseline understanding of e-learning while developing skills in using WebCT. Two e-mechanisms have been developed within Learning Services that enable this baseline understanding and they are supplemented by practical applications of WebCT; for example, receiving staff training with the Customer Care module and the management of functional tasks such as hosting the Help Desk Intranet and various booking systems.

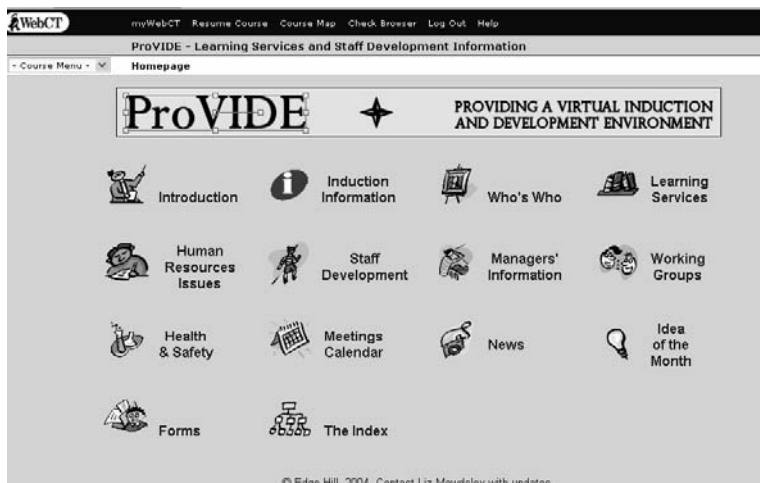
ProVIDE - a baseline understanding of e-learning

A resource was created that ensured all staff would use WebCT within their everyday role. It is called ProVIDE (Providing a Virtual Induction and Development Environment) and

it achieved the Society of Colleges, National and University Libraries (SCONUL) Staff Development Award for innovative practice, 2001. ProVIDE is an information base for all Learning Services staff regardless of their role or position within the department. It offers flexible and equal access to information, support, guidance and training opportunities. It is also a key tool for staff induction, being embedded within the departmental staff development programme.

ProVIDE enables all staff to experience WebCT at a very basic level through developing navigation and information retrieval skills. It contains the following sections (Fig 1):

Figure 1 Design and layout of the main areas of ProVIDE



Introduction, provides the context and explains how to use the WebCT tools and navigation.

Induction Information, contains information about Learning Services and the wider institution's staff induction programmes. New staff can view their personal induction timetables and tasks that they are expected to complete in order to demonstrate their use of the information base.

Who's Who, is the profiles tool within WebCT where staff create a personal home page that includes a photograph, information about their job role, working patterns, location and personal interests. We consider this to be an important feature of ProVIDE, giving it a personal and social face.

Learning Services, provides an overview of the service and staffing structures.

Human Resources Issues, contains information about salary matters, annual leave and sickness monitoring.

Staff Development, contains the staff development and mentoring policies together with information about training opportunities within Learning Services, the wider institution and externally.

Managers Information, offers guidance and information for new managers.

Working Groups, provides details of the formal meetings structure and membership of groups.

Health and Safety, contains the policy, contact information and emergency evacuation procedures.

Meetings Calendar, offers a comprehensive point of access to meeting dates and venues.

News, links to items of current news within the department.

Idea of the Month, offers information and feedback about the ‘Idea of the Month’ initiative.

Form, are provided electronically and include staff development application forms, annual leave forms, claim forms for additional hours worked.

The Index, is a search tool.

The aim is to organise information consistently within the sections. Each section contains a contents page and an introduction. Content has been organised within the pages to assist users with the rapid scanning of text. This includes use of headings, emboldened text and bulleted lists. A template was devised within DreamWeaver to ensure there was a consistent look to all pages within the resource. After a period of testing and evaluation, ProVIDE was introduced to all staff within the department through face-to-face staff training sessions in IT classrooms where they had an opportunity for a ‘hands on’ introduction to the resource. These sessions proved to be a lively and positive experience for the project team and the staff - as evidenced by their formal and informal feedback. We have evaluated participants’ usage and the statistics show that the resource continues to be used regularly by staff beyond their induction period.

Supporting Online Learning - a four-week module

A short introductory module was developed to meet the needs of front-line staff. The primary aim was to introduce staff to the e-learning experience while they also learn about the pedagogy and technology. The module runs over a period of four weeks, starting with a face-to-face session. It requires a commitment of approximately 2-4 hours per week and the participants produce a portfolio that consists of their responses to the tasks contained within the module which demonstrate their engagement with the content and each other. The module contains four units (Fig 2):

Figure 2 The four units within Supporting Online Learning.



Module Introduction: an opportunity to acclimatise to the online environment with a general overview of the module, its aims and learning outcomes, structure, learner guidelines and assessment information.

Unit 1: an examination of what online learning is and “how will it affect me?”

Unit 2: a closer look at online learning covering interaction, communication systems and success factors.

Unit 3: ways of assisting online learning, using online resources, skills support and tutor support.

The communication systems used within this module are:

Mail: an internal e-mail system that allows participants to communicate with the facilitator and send completed work to them.

Discussion Forum: this allows participants to post public responses to unit activities Unit.

Chat: allows real-time discussion between participants.

Profile: participants create their own web page within the WebCT module.

Four cohorts have now completed the module. The participants have mostly been drawn from the help desk and learner support staff but other staff who have requested a place (for example, Issue Desk and Media Services staff) have been accommodated. A total of 44 staff have now undertaken the module and 30 portfolios have been submitted. As with ProVIDE, this module has been carefully evaluated and feedback has been obtained from WebCT usage statistics, the content of discussion postings, completed portfolios and evaluation forms. Feedback tells us that participants value the flexibility that e-learning offers. Content and design of the environment scores highly but participants struggle with their time management and motivation, commenting that it can be isolating learning online. Interestingly, during the pilot run of the module 66.7% of participants said they would choose to take another online course and 55.5% claimed they found it easy to learn online.⁸

Customer care – an e-learning case study

The enthusiastic response of Learning Services staff to their first experiences of online learning led us to develop a module in customer service skills, a ‘soft skill’ commonly delivered through instructor-led training. Customer Service is a popular skills area that over three quarters of organisations provide for their staff.⁹ Our decision not to buy an ‘off the shelf’ training product was based upon a number of factors. Firstly, our research into e-learning that suggested that participants did not enjoy working with generic course materials, finding them to be irrelevant and lacking authenticity.^{10,11} Secondly, we were keen to deliver a module that was based on the sound educational principles and practice of social constructivism. This pedagogical view is, according to Mayes,¹¹ based upon “collaborative learning, authentic tasks, reflection and dialogue”. The learning tasks must, therefore, be designed to be authentic to the work and social context in which the skills are normally employed.

In practice, this means that we do not see online learning comprising solely the digitisation of our printed customer care training materials, as this simply exposes our learners to inert facts and information. We want to offer them an experience that enables them to plan, act, reflect and discuss. To reinforce our view of the importance of the module, we consider it essential that participants demonstrate that they have met the learning outcomes with the production of a portfolio. By this means, we can ensure that the delivery methods are aligned with the learning outcomes, which state that by the end of the module participants will be able to:

- describe the theory and potential benefits behind customer care initiatives

- identify who their customers are and what their needs and expectations might be
- apply customer care theory to their working practices
- apply Learning Services basic customer care guidelines
- identify their own customer care skills and develop an action plan for their further development

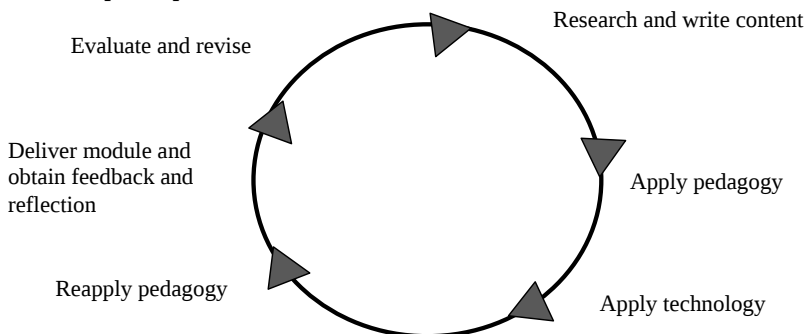
We also want the module to recognise that Learning Services staff have already acquired considerable skills and experience as both givers and receivers of customer care and to somehow incorporate this into the module's ongoing development.

The development process brought together the knowledge and experience of two information professionals (one of whom is the Lending Services manager), and a learning technologist. This range of expertise has ensured that the module has been developed with an understanding of the technological, pedagogical and customer care issues. The collaborative process the team undertook should also be viewed as a learning process in its own right and can be illustrated diagrammatically by applying Kolb's¹² model of experiential learning (Fig 3). This iterative approach has proved to be particularly productive, resulting in an organic, constructivist approach where our focus has been upon the probable experience of the user. The team's problematising, 'real talk' approach, as defined by Jarvis,¹³ has resulted in their producing a range of interactions for the learner, with the content and other participants. The team has also introduced strategies to promote online learning, for example:

- all examples and resources used within the tutorial are linked to the learners' current workplace needs,
- an online entry- and exit-point skills audit has been written to identify where skills 'gaps' may occur and provide an opportunity to reflect upon how they have been resolved,
- use of visual, audio and animated examples to explain abstract concepts, where the learner interacts with the technology and to some extent, has control over what they are seeing,
- summative quizzes created in Hot Potatoes software and embedded within the pages of content,
- opportunities for learners to apply problem solving and research skills using 'real world' activities and to reflect upon the outcomes,
- a moderated discussion forum that provides opportunities for reflection, collaborative problem-solving and sharing of experience.

This reflective and iterative process (Fig 3) aimed to avoid the temptation to use technology for its own sake, rather to weave it seamlessly through the pedagogy and module content in a way that added value to the learning. It also sought to prevent what Iverson¹⁴ calls 'interaction overload' through the bombarding of learners with quizzes, discussion postings, animations and other types of interaction. She states "Achieving balance in interactivity is an important goal in e-learning design and activity".

Fig 3 The development process of the Customer Care module



The Customer Care module comprises 6 units of content, a resources section and a Wiki (Fig 4). A Wiki is a web site that allows a user to add content, but also allows that content to be edited by anybody. The purpose of the Wiki in the context of this module is to enable learners to share their own experiences and knowledge of customer care with present and future participants on the module, with the hope of making it an organic, continually developing resource.

Fig 4 The Customer Care module home page



The module runs over four weeks and is introduced to the participants at a face-to-face session. It requires a time-commitment of between 2–4 hours a week and participants must produce a portfolio consisting of their contributions to the module tasks and their reflections on what they have learned. The six units (see fig 5) are:

Unit 1: Introducing Customer Care provides an orientation to the module and an opportunity to undertake a self-audit of existing customer care skills. The task at the

end of this unit requires the participant to reflect upon their current customer care strengths and weaknesses and the nature of any skills ‘gap’.

Unit 2: Customer Care theory looks at definitions of customer care and the theory behind how organisations keep or lose customers. This unit also contains an animation, a quick quiz and two video case studies.

Unit 3: Identifying our customers takes a close look at who our customers are and why it is useful to break them down into segments and to analyse their specific needs.

Unit 4: Putting theory into practice looks at verbal and non-verbal communication skills, and the management of conflict. This unit contains a quiz and a video containing real-life tips for delivering excellent customer care.

Unit 5: Some Learning Services guidelines places the learning from the preceding units firmly in the context of Learning Services, its mission, policies and ethos. This is because we consider a thorough knowledge of the organisation one works is essential for the delivery of excellent customer care. This unit contains a series of staff development PowerPoint presentations to which an audio narrative has been added.

Unit 6: Putting it all together provides an opportunity for the learner to review their progress through the module and identify any remaining skills gaps around customer care. It also requires the learner to construct an action plan for their continuing development in customer care delivery.

Each unit follows a consistent design and structure to enable learners to find their way around the content. The pages within each unit include learning outcomes for each unit and a statement containing the number of pages and activities in each unit. Pages are broken up with coloured ‘box outs’ that contain relevant quotes or tips for the learner and links to interactive elements which are readily identified by a character called ‘Colin Care’ (Fig 6). Each unit also has a ‘Take Notes’ option where learners can capture their reflections online. These notes remain private, solely for the use of the individual learner and can be used to build their portfolio content. Finally, each unit concludes with a reflective task, which requires the learner to use the ‘Take Notes’ facility. All tasks explain the purpose behind the task, for example:

Purpose: To reflect upon your understanding of who our customers are and to connect this understanding to the services that we provide.

Task: Now that you have completed this unit we would like you to spend some time thinking about our customers and how the services we provide meet their needs.

- a) Does it help you to think in different groups or segments of customers?
- b) Is it our business to tailor our services to customer groups or should we offer a service where customers fit in with routines that suit the service and its staff?
- c) What, in your opinion, are the basic needs of customers using our services?
- d) How useful do you find the various information-seeking strategies outlined on page 4 of this Unit?

Click on the *Take Notes* link on the action menu at the top of the WebCT tutorial page. You can use the Take Notes facility to record your thoughts.”

Fig 5 The six units

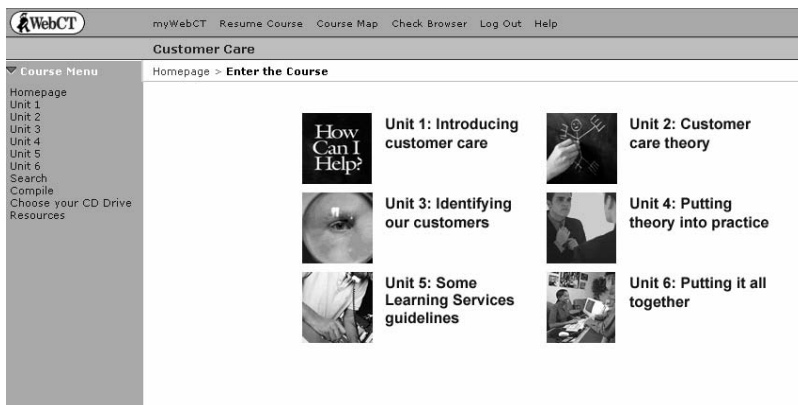
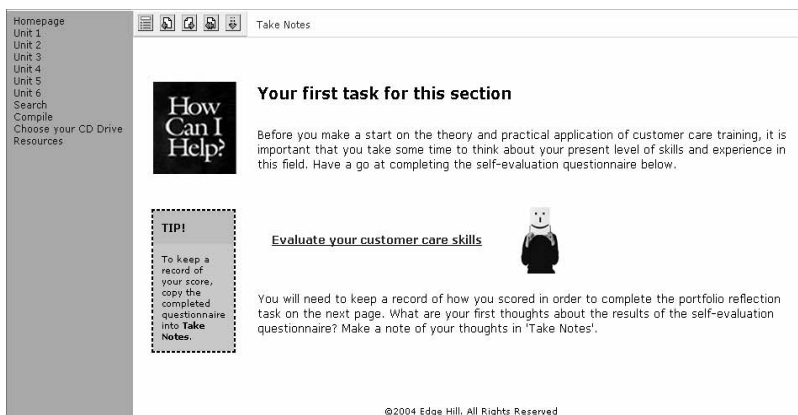


Fig 6 The layout of a page within a unit



During the development of the module, the team sought the co-operation of the Learning Services staff through asking for their ‘top tips’ and requesting volunteers for video case studies. Staff volunteers also had access to the module while it was in development and were invited to give their constructive feedback. As the module neared completion and was ready for beta testing, all new Learning Services staff were also asked to work through the module as part of their induction programme. In all fifteen staff have now had access to the tutorial during the beta testing and their feedback has been very positive. The early indications are that we have achieved a good balance of interactivity. The quizzes and multimedia material have been particularly well received and participants state that they consider that these features have aided their learning. We have also been able to analyse the amount of use participants have made of the module through WebCT’s tracking facility. The usage statistics also demonstrate a strong engagement with the module content.

Our next step is to move beyond beta testing and run the module as part of the annual staff development programme in January 2005. A wide range of staff have applied to participate on the module and will submit completed portfolios, which will be assessed by the development team. The module will commence with a face-to-face session that will include an opportunity for hands-on with the module. It will also provide an opportunity for staff to meet and get to know one another through use of ice-breaking activities around customer care. Thereafter, the learning will be solely online and will be facilitated by the module development team. Two of that team are experienced at online facilitation and the third has experienced being an online learner through participating on the Supporting Online Learning module.

In line with our usual reflective/evaluative process of developing e-learning (and indeed, any other learning), we will carefully evaluate the module to ensure that the learners' experience was positive, that the interactivity was of an appropriate nature and amount, and that the assessed work demonstrates that the stated learning outcomes have been met. The evaluation will be drawn from completed participant feedback questionnaires, contributions to the discussion forum and Wiki, WebCT usage statistics and an analysis of the completed portfolios. This evaluation will be the subject of a further report in the summer of 2005.

Further training and development

The e-learning examples described in this paper are not the only courses and resources made available to Learning Services staff. To enable the effective operation of multi-professional teams, for example those staff working in learning support and learning technology roles, further training and development is available to complement project work as follows:

- an eight-week Developing and Delivering Online Learning course,
- additional, specialised workshops, for example, e-administration, e-moderating, technical skills,
- information skills online to support staff on Help Desks.

We are also investigating how we can add value to the Supporting Online Learning and Customer Care modules through obtaining accreditation. Staff feedback clearly indicates that accreditation would be a welcome development and would have a demonstrable impact on the motivation of staff when learning online.

Conclusion

Edge Hill's Learning Services has adopted an innovative and strategic approach to its staff development needs in response to the e-learning imperative. By ensuring that all staff are equipped with the necessary baseline skills, the service has been able to respond to the swell of demand for learner support and requests for advice and collaboration in the use of e-resources. Our bespoke approach to designing online modules for staff development has ensured that learners receive an experience that is rooted in their work and social context and offers an environment where they can plan, act, reflect and discuss. This contention is supported by our detailed evaluations of the WebCT modules that we have created. Our challenge is threefold: to continue with our multi-disciplinary, iterative team process of developing authentic e-learning opportunities; to add value to the learner's experience through obtaining accreditation for our online modules, and finally, through our ongoing staff development, to work towards 'e-everything!' where e-support and e-learning are regarded as commonplace and account for 50% or more of delivery.

References

- ¹ Salmon, G. Pedagogical requirements of Virtual Learning Environments (VLE's): pets & planets. *The 24 hour University: Stretching the Limits: UCISA TLIG-SDG User Support Conference, Leeds UK April*. 2002. URL <<http://www.atimod.com/research/presentations/Salmonleeds.htm>>
- ² Gilbert, S. W. A new vision worth working toward: connected vision and collaborative change, *The TLT Group*, URL <<http://www.tltgroup.org/resources/vvwt.html>>
- ³ Rowley, J. *JISC User Behaviour Monitoring and Evaluation Framework: Framework Report to 2002 (Cycles 1-3)*. [2 vols: FE and HE]. London: Joint Information Systems Committee, 2000.
- ⁴ Russell, B. Analysing e-journal usage data for mutual benefit. *Library and Information Update* 2004, 3 (6), 36-37.
- ⁵ Black, C. & Roberts, S. Staff without walls: developing library and information staff for e-learning. In: Brophy, P. Fisher, S. & Craven, J. (eds) *Libraries Without Walls: The Distributed Delivery of Library and Information Services*. London: Facet, 2004.
- ⁶ Oldroyd, M. (ed.) *Staff Development in Academic Libraries: Present Practice and Future Challenges*. London: Library Association Publishing, 1996.
- ⁷ Salmon, G. *E-moderating: The Key to Teaching and Learning Online*. London: Routledge, 2000.
- ⁸ Forsyth, A. *Exploring New Learning Landscapes: Edge Hill's Supporting Online Learning Module*. [Unpublished] Edge Hill College of Higher Education, 2002.
- ⁹ Young, K. Is e-learning delivering ROI? *Industrial and Commercial Training* 2002, 34 (2), 54-61.
- ¹⁰ Paton, N. Work: hard lessons from the big e-learning experiment: Nic Paton discovers why the much-hyped new way of workplace training has failed to deliver on its promises and why so many staff just don't want to know. *The Guardian* 2003. 30 August, Jobs & Money: 5.
- ¹¹ Mayes, T. Learning technology and learning relationships. In: Stephenson, J. (ed.) *Teaching and Learning Online: Pedagogies for New Technologies*. London: Kogan Page. 2001.
- ¹² Kolb, D. A. *Experiential Learning: Experience as the Source of Learning and Development*. New Jersey: Prentice Hall, 1984.
- ¹³ Jarvis, P., Holford, J. & Griffin, C. *The Theory and Practice of Learning*. 2nd ed. London: Kogan Page, 2003.
- ¹⁴ Iverson, K. *E-learning Games: Interactive Learning Strategies for Digital Delivery*. New Jersey: Prentice Hall, 2004.

BECOMING A MARKETING SPECIALIST IN AN ACADEMIC LIBRARY

Lotta Haglund

Karolinska Institutet, University Library

P.O. Box 200

S-171 77 Stockholm, Sweden

lotta.haglund@kib.ki.se

Abstract

The paper discusses the librarian's role as a marketing professional, and the educational needs required to prepare for this work. Starting with an introduction to library marketing and related literature, the paper draws its data from two surveys of Swedish schools of library and information science and Swedish university libraries. The paper concludes with suggestions for professional development for librarians involved in library marketing.

Introduction

Before discussing the educational background, special qualifications and continuing professional development of the marketing professional in an academic library, it is necessary to briefly consider what is meant by marketing in a library, including a short introduction to marketing theories.

Marketing is not a new concept in libraries, but librarians are now working in circumstances where the strategic value of marketing is seen to be increasing. Libraries have worked with at least one aspect of marketing – promotion – for several decades. It is now necessary to take this approach further and adapt the marketing concepts used the wider service industries for use in libraries.

In general terms the driver for this change is the ubiquity of the web. Until recently libraries were unchallenged in the information market. The library was *the* place to go when information was needed. This situation has changed rapidly, however, and there have never been so many choices of sources for information, reading and entertainment as there is today. In short, libraries now operate in a highly competitive environment.¹ One of the dangers for libraries in this environment is that in becoming too self sufficient users will no longer understand the value of the work librarians do 'in the background'. If users can find information themselves from their desktop they will often fail to appreciate that to a great extent it is librarians making this information available. Eventually the resulting invisibility of librarians will have detrimental effects on library funding, as users ask why they should pay for something that they can do for themselves?

The onus is therefore on libraries to change the focus of their marketing from promoting the use of library resources to educating users to the extent that librarians' skills can add value to their information use. This is more important than simply making users appreciate that it is the library that makes resources available to them. Librarians need to shift the marketing focus to building relationships and partnerships with users that are as substantive as the resources and services they have spent so long developing. If these relationships are nurtured in order to create a loyal customer base, then the users will in turn do some of our marketing for us.² How do you build relationships with customers? There are several ways of doing this, but the most important is to move out of the library, and to take part in the wider activities of the parent institution. This is a strategic choice made for the future of the library.

Marketing mix theory

One of the most widely taught marketing concepts has been the marketing mix theory, based on the '4 Ps' of product, price, place and promotion.

- Product (or service): working from a precise knowledge of customer need, a product or service is designed to meet that need
- Price: the product must be made at a cost that allows the company to market it at a price the customer can afford and that is competitive with alternative products
- Place (distribution): once the product or service is developed, a distribution system must be designed to make the product conveniently available to the customer
- Promotion: the product's availability, advantages, and price must be made known to the purchasing public. This may be accomplished through a variety of approaches ranging from word of mouth to aggressive advertising.

The marketing mix approach has been criticized for being incomplete by not bearing in mind properly the needs of the customer, and disregarding services marketing. In order to overcome some of its deficiencies, the 4Ps have been expanded, to 5, 6, 7 and even 15Ps. Both the marketing mix and relationship marketing (see below) are – in theory at least – based on the marketing concept which puts customers and their needs as the focus. In practice, the 4Ps are too often used for manipulation of customers, exploiting customer ignorance.^{1,2} Many individuals think of marketing only in terms of the last P, or advertising. In fact, the true marketing concept is an integral part of strategic planning that starts with the identification of customer need and ends with the successful sale and distribution of the product or service.⁴

Relationship marketing

There are many descriptions of the goal of relationship marketing, one being that, "Traditional marketing is about getting customers. Relationship marketing addresses the twin concerns – getting and keeping customers".¹ A working definition of relationship marketing by one of the pioneers of the concept it is marketing undertaken in order to, "establish, maintain, and enhance ... relationships with customers and other partners ... so that the objectives of the parties are met. This is achieved by a mutual exchange and fulfilment of promise".⁵

Relationship marketing is based on the notion of trusting cooperation with known customers. This is a fundamental concept supported by many libraries. A library frequently provides services to a known set of customers. Libraries also operate on a degree of trust. When a customer walks into the library or contacts the library, they trust that the librarian will act professionally to locate the material or information the user needs. The library in turn trusts that the user will return borrowed items within the specified borrowing period. Users, however, are the reason that libraries exist. It seems evident that the way to create a dynamic library organisation is by understanding and cultivating users. Libraries are, however, built around a series of relationships not only with users, but booksellers, library suppliers, publishers, database providers and library consortia. Relationship marketing therefore seems to be an obvious fit for libraries.^{1,3} The 4Ps and their extensions will always be needed, but the shift to a marketing paradigm reaching beyond promotion increases their role from that of being founding parameters of marketing to being contributing parameters to relationships, networks and interaction.

What then is a relationship with a user? It consists of an episode of encounters through resources, facilities, services, and service providers, which may extend over many

transactions and several years. It is commonly asserted that the attitudes that are most useful are those that are formed through personal behaviour. A library user who has a direct, positive personal library experience will have a more enduring positive attitude than one who reads about library services in a newsletter. Repeated exposure to services is also extremely important.^{6,7} The different relationships a library can form is described in detail by Besant and Sharp,¹ adapting the relationship marketing theories by Payne and Gummesson to a library setting.

Relationship marketing is an activity that does not work effectively unless participants believe in it. It should be 'everywhere' in the sense that there has to be a marketing aspect in all roles, tasks and departments of a service organisation. In other words, there has to be an appreciation of the user in all tasks that are performed in a library, and the user is the responsibility of everyone in the library. Marketing is a question of the attitudes of the staff and the entire organisation. Goods are used, but services are experienced. The people who work in the library are the most important marketing resource. The deciding factors for success are attitude and commitment to not only users, but to service providers, other libraries and employers. The concept of relationship marketing must guide all functions and departments of the library and must be understood and accepted by everyone.^{3,8}

Service managers need to know/collect and act on a lot of information about their customers. This can be obtained in various ways, including customer feedback, surveys, focus groups or one-on-one transactions.² A systematic relationship marketing approach requires an analysis of the customers of a library, and an understanding of the aspects of the services that creates value. The challenge is then to develop a series of value generating activities that continue to forge relationships with customers.⁶

Literature review

Finding literature on the subject of continuing professional development and workplace learning for library professionals working with marketing proved to be a difficult task. Repeated database searches using a range of search terms provided only a few references, most of them not relevant to the subject. The databases searched were LISA, Eric, PubMed, Cinahl, Nordiskt BDI-index (Nordic LIS-database), Libris (Swedish union catalogue), and Academic Search Elite. The literature search was initially limited to references from 1995 and onward. When very little was found the searches went further back, and finally two older relevant references were found and included in the review.

The most important publication on the subject is the proceedings from the IFLA satellite meeting of the Management and Marketing Section in 2001.⁹ The first part of the publication deals with the teaching of marketing in schools of library and information science (LIS) in North¹⁰ and South¹¹ America, and the UK.¹² Similar surveys were sent out to LIS schools, and the findings were similar in the UK and North America, with less than half the responding schools teaching marketing. There is a difference in perception of the importance of marketing as a subject for librarians; in North America it is perceived as less important, while in the UK 69% of the respondents judge the topic as important or very important. In the North American schools 90% of the given units in marketing were elective, while in the UK the undergraduate marketing units were elective but for the postgraduate courses offering marketing they tend to be required units. It is interesting to note that even though marketing is perceived by both LIS schools and library practitioners in the UK to be important or very important, the subject is only offered by a few schools.¹² The survey in South America showed that only Brazil offered LIS education, and the survey was therefore limited to this country. Six out of nine institutions completed the questionnaire, with three of these offering an optional marketing unit on an irregular basis.¹¹

In another section of the IFLA proceedings⁹ two examples of continuing professional development in marketing for library practitioners are given; one from the US and one from Estonia. In the American example the author¹³ discusses the advantages and disadvantages of various methods for supplying continuing education, concluding that web-based distance learning courses are advantageous since they appear cost effective. She goes on to draft a course aimed at librarians in public libraries focusing on what she describes as a key to marketing in public libraries - demographic and geographic data describing users and the boundaries of the market area, as well as statistics on library use. The course is described as including: 1) marketing research; 2) Geographic information system software; 3) sample case study; and 4) appendices including secondary data, marketing research bibliography etc. In the Estonian example the author¹⁴ describes the huge interest from Estonian librarians in marketing issues, and how it is met by basic courses in LIS education, as well as specialized courses for library practitioners. These include courses on different marketing topics (strategies, planning etc); courses based on different target groups (academic libraries, public libraries etc); as well as the development of a library marketing portal as a forum for library and information professionals.

In the only published guidelines for the teaching of marketing to information professionals, Savard¹⁵ describes in detail how he perceives the education of “marketing librarians” should look. The content of the guidelines is based on the wide experience of the author, “who has been responsible for initial training courses at various levels and continuing training for varied groups in a number of developed and developing countries”. The main part of the document sets out in six modules the possible content of such training:

1. the marketing approach as a management tool in the context of information services,
2. marketing and behaviour patterns in the information field,
3. marketing research,
4. the marketing mix – supply,
5. the marketing mix – communication strategies,
6. marketing strategy and planning.

The modules are based on the marketing mix theory, and even though the author describes marketing as a help in making organisations achieve something which they by nature seek – a closer relationship with their public - the concept of relationship marketing is not raised. When reading the guidelines it is evident how the library *and* marketing fields have changed since these guidelines were published in 1988. Even though the information in the guidelines feels dated it could perhaps be used by someone putting together a new course in library marketing, since many of the concepts of the marketing mix theory are used alongside more relationship oriented approaches. No evidence on the use or implementation of these guidelines was found in the database searches.

Greiner¹⁶ discusses, in an article from 1990, the roles of the non-M.L.S. professionals in the (public) library emphasising the positive effects of library staff with a mixed background. The author argues that M.L.S. students should be provided with administrative, management, and marketing training, and that librarians who are employed in academic, special, and public libraries all need to understand marketing principles in order to maximise their effectiveness. This doesn't, however, mean that librarians should fill all marketing/administrative positions in a library. The article provides five examples of non-M.L.S. professionals working in libraries, and concludes that employing these ‘other’ professionals “allows the library organisation to more efficiently utilize the strengths of library professionals”.

An important article was published recently by Ashcroft¹⁷ wherein she describes the changing world for librarians and how they need to adapt to the new professional environment. A large part of the article is focused on marketing and communication skills, and argues that knowledge of effective marketing, promotional and evaluative techniques are increasingly important for information professionals, as well as self-promotion, evaluation techniques including statistics, and performance management. Ashcroft concludes that librarians need knowledge in effective communication and market research skills. Unfortunately she does not describe how this will be done, but cites evidence that “points to the need for teaching departments to incorporate emerging requirements... into their syllabi”.

An article¹⁸ written by the Coordinator of Continuing Professional Development (CPD) at the Danish library education in Copenhagen describes ‘CPD in practice’. The article focuses on public libraries and describes the new skills librarians need, including skills in selling, communication, and measuring/evaluating.

Almost all articles discussing marketing in libraries¹⁹ argue that the importance of marketing is growing, but unfortunately none of them goes on to describe in detail exactly what skills librarians need and how to obtain them.

Therefore in order to provide data relevant to the question of the requisite educational background, and to collect information comparable with the surveys mentioned above, two email surveys asking questions regarding marketing in libraries were distributed. One of these went to the LIS educators in Sweden and one to twelve university libraries in Sweden.

Survey of library and information science educators in Sweden

In Sweden there are six university colleges/universities offering education in library and information science. These are Borås University College, and the universities in Umeå, Uppsala, Linköping, Lund and Växjö. A survey was sent by email to the person in charge of LIS education at each of these institutions asking:

- is there a course during the LIS education dealing with marketing? If not – why? If it does, please describe the course briefly.
- which skills do you consider important for someone working with marketing in a library?
- what kind of educational background would be relevant for someone working with marketing in a library (LIS degree, journalist or other)?

Four of the institutions, Lund, Umeå, Uppsala and Borås, responded to the survey. Even though it is well known among Swedish librarians that the LIS educational institutions have different focus, the answers were surprising, particularly for the first question.

One respondent stated that marketing is not sufficiently important for a special course and another that marketing for libraries is no different than other kinds of marketing. The third respondent describes marketing studies as part of other courses, i.e. information resource management. The students are made aware of the marketing mix theory and a marketing project is conducted. In another course some literature on marketing is included, and the students are then free to choose areas in which they want to deepen their knowledge. One possible subject is marketing, and a course paper is then produced on the chosen topic. The fourth respondent stated that marketing is the cornerstone of the LIS education, and describes in detail how the students are trained in both theoretical and practical aspects of marketing. This respondent also argued that marketing must occur at all levels of an organisation, and that different staff can be responsible for different tasks (planning, writing etc).

The conclusion reached by this final respondent is that the person responsible for marketing could be a librarian, or some other non-LIS professional with the right skills for the task at hand. Of the other respondents two answered that it could well be a librarian

responsible for marketing if he/she has the right skills (marketing, psychology, subject knowledge relevant for the library) and qualities (outgoing, imaginative, initiative). The final respondent argued that since there is no difference between marketing in libraries and other organisations, the responsible staff should have a degree in business administration specialising in marketing, or be a public relations officer.

None of the LIS educators who responded offer shorter courses in marketing for post-graduate students.

Survey of Swedish university libraries

A survey was sent by email to the library director/librarian of eleven Swedish university libraries (Stockholm, Göteborg, Umeå, Linköping, Lund, Karlstad, Växjö, Örebro, Luleå, SLU, Kungliga Biblioteket and Uppsala) and the National Library, asking:

- do you have a member of staff with the responsibility for marketing/information/communicating with your users/customers?
- if yes, what is the educational background of this person, and how is his/her need for CPD met?
- if you were to hire a new member of staff with the above responsibilities, which educational background would you look for in the new employee?

Ten of the library directors/librarians answered the questions, but some did not give full answers.

Seven of the responding university libraries had someone responsible for marketing, one of them on a temporary basis. Of these seven, four were librarians and one was shifting from being a librarian to a public relations officer. One of them had a background as a journalist. The final respondent did not specify the educational background.

Of the three libraries without a staff member responsible for marketing, one had a group of three (librarians) working with these tasks. One respondent answered that the responsibility for marketing is delegated to all heads of departments, and that marketing must occur at all levels of the organization, and be integral to all meetings with users and funding bodies. The final library indicated that they have reorganized the library and the three groups with responsibility for user services are the ones most involved in marketing activity. They added that the need for marketing is great and that the best way of marketing is personal contacts.

When it comes to the question regarding CPD, six of the universities responded. The answers were all the same; CPD is provided by individual participation in courses, seminars and conferences. None mentioned keeping up to date with the marketing literature, in and outside the library field. One of the respondents listed the most important courses and associations that had helped building the marketing skills, and concluded by saying that it is basically “learning by doing”. This often occurred outside the traditional library arena and in different development projects, complemented by shorter courses, and was the means to becoming a competent marketing professional.

Five of the libraries answered the last question about the preferred background of someone they would hire to work with marketing. Two stated that it would be a librarian, preferably also with an education in media and communication. One answered that the newly educated librarians “are good at marketing and information”. Considering the answers from the LIS educators provided above, this would perhaps not be true of graduates from all LIS educational institutions in Sweden. One library answered that they would like to hire a marketing specialist, but didn’t specify the preferred educational background.

Another library reported that the preferred background would be someone with the same educational level as the faculty of the university, with knowledge of marketing and

communication. This might be a librarian, but it would not be the first choice. The final library could see several possibilities:

- someone with a background in communications, complemented with knowledge of the situation of the customers *or*,
- a journalist interested in science *or*,
- a researcher with knowledge in communication and pedagogy *or*,
- a librarian with knowledge in communication and pedagogy.

One conclusion from this survey is that one reason to hire a librarian to work with marketing is the possibility to use him/her for other tasks in the library, as well as for his/her knowledge about libraries and how they function. To be able to decide who should work with marketing the individual library must decide what they mean by marketing, and what is their level of ambition in this regard. If the library director isn't devoted to the issue of marketing it will be almost impossible to do more than promotion.

The most important background for someone working with marketing in a library is specialised knowledge in marketing and communication. It could be a librarian with additional marketing education, a journalist, a business administrator specializing in marketing, a public relations officer or someone similar. Of course this person also needs some particular knowledge about, and interest in, the organization they represent. This means that non-librarians may need complementary education in library and information science to be able to understand the peculiarities of the library they represent.

Libraries must start to consider, on a broader scale, how to recruit for different positions in the library. Is a librarian always the best choice? For most of us the days when the best head of acquisitions department was the acquisition expert are gone. This is not relevant only for heads of departments. As Greiner states, employing these other professionals "allows the library organisation to more efficiently utilize the strengths of library professionals". Librarians can no longer afford to view other professionals in the library as a threat.

If the library director is dedicated to marketing and knowledgeable about marketing trends, relationship marketing should be a focus for the library. Since relationship marketing emphasises that all library staff are responsible for marketing in all contacts in and outside the library, a very important task for the marketing professional is to build the appropriate corporate culture. The modern academic library needs to have a professional attitude to marketing. This means employing the most suitable individual for the task, working in a user centred manner, and emphasising the importance of 'outreach'.

CPD for librarians working with marketing

Undergraduate training – LIS education – must acknowledge marketing as an important issue for the future of libraries. This means training students in theoretical and practical marketing, with relevant case studies and experience of strategic planning.

For librarians already working with marketing one must hope that they are in an organization dedicated to the importance of marketing, which understands that the marketing librarian requires ongoing professional development. It would be preferable for marketing librarians to get a degree in business administration specializing in marketing or in media and communication, in addition to their LIS degree. For most librarians, however, a second (or third) degree is not a possibility, and we have to rely on CPD and workplace learning. This doesn't mean surrendering the possibility of doing university courses within the marketing area. In several countries (including Sweden) adult students are welcome at universities, not only to study for a degree but also to take shorter courses. Interested librarians need to find and attend interesting courses at university level. Ideally employers should be willing to contribute towards the time, money, and textbooks needed.

It is also very important to read widely. There is at least one library journal - *Marketing Library Services* - dedicated to marketing and many library journals publish articles on marketing at least occasionally. But keeping abreast of the library literature on marketing is not sufficient. To be able to adopt new thinking and new methods you will also need to follow marketing literature in other environments. Many relevant new ideas and concepts are found in the literature related to marketing for service industries. This might mean spending more time than the average librarian on reading. It is advisable to read the most prominent 'gurus' on marketing; such as Kotler, Grönroos and Gummesson. A good way of getting further than just reading the literature is to meet with colleagues who have the same responsibilities in other libraries in order to discuss recent additions to the literature. This could lead to the formation of a journal reading club devoted to marketing.

Networking – between libraries, with the university department for public relations, nationally and internationally – is also important to the professional development of the marketing librarian. Starting at the parent organization a good relationship with the public relations department of the university is vital, both for professional development and for identifying marketing channels and receiving professional help with layout and production of marketing material. Building networks with colleagues working with marketing in other universities will provide informal channels to new knowledge and invaluable possibilities for discussions on practical aspects of the job. Without these contacts being responsible for library marketing can be a lonely job, as you try to gain and maintain an outsider's view of the library that no one else in the library has.

Networking nationally and internationally in library and other associations is very important for professional development, since it provides wider networks for information and inspiration. Many national library associations have a special section on marketing. For example, in the UK the Chartered Institute of Library and Information Professionals has its Publicity and Public Relations Group (<http://www.cilip.org.uk/groups/pprg/index.html>), and the Swedish Library Association has a section dedicated to marketing. Internationally there is the IFLA section on Management and Marketing with its newsletter (<http://www.ifla.org/VII/s34/somm.htm>). The IFLA section organises pre-conference meetings to the IFLA conferences, and also provides the annual IFLA 3M International Marketing Award. Another way of distance networking is to join one of the email discussion lists devoted to library marketing, i.e. mrktlib@listserv.louisville.edu.

Last but not least there are different kinds of courses and conferences available. Some are organized by library associations, but it is advisable to attend courses given to other professional groups, i.e. public relations officers/managers, or other service industries. Again it is important to have the support of the library management because the non-library courses and conferences can be priced very differently from library events, but looking at the return for investment it may be very good value, since this is where new ideas originate.

Conclusion

It is apparent that knowledge about marketing theories and how to apply them in practice is very important to librarians. Without the theoretical knowledge the marketing efforts of the library tend to go no further than promotion. Unfortunately the library literature on marketing, as well as courses and conferences arranged by library associations, tend to focus too much on examples, with little connection to theory or discussion about why certain user groups were targeted or certain methods of communication preferred.

Librarians have to move beyond the library environment in search of new ideas, and acquire theoretical as well as practical marketing knowledge. Using the words of one of the respondents of the survey to Swedish universities; with a LIS educational background it is

basically “learning by doing”, often outside the traditional library arena and in different development projects, complemented by shorter courses, that is the solution to becoming a competent marketing professional.

References

- ¹ Besant, L. & Sharp, D. Upsize this! Libraries need relationship marketing. *Information Outlook* 2000, 4 (3), 17-22.
- ² Soules, A. The principles of marketing and relationship marketing. *portal : Libraries and the Academy* 2001, 1 (3), 339-350.
- ³ Singh, R. Developing relationship marketing with customers: a Scandinavian perspective. *Library Management* 2003, 24, 1/2, 34-43; Soules, A. The principles of marketing and relationship marketing. *portal: Libraries and the Academy* 2001, 1 (3), 339-50.
- ⁴ Murphy, K. R. Marketing and library management. *Library Administration and Management* 1991, 5 (3), 155-158.
- ⁵ Grönroos, C. *Strategic Management and Marketing: Managing the moments of truth in service competition*. Lexington: Free Press, 1990.
- ⁶ Rowley, J. Information marketing: seven questions. *Library Management* 2003, 24 (1/2), 13-19.
- ⁷ Wolpert, A. J. Marketing strategies : lessons for libraries from commercial brand management. *IATUL Proceedings*, 1999, 9, 99. URL <<http://www.iatul.org/conference/proceedings/vol09/papers/wolpert.html>>
- ⁸ Gupta, D. K. & Jambhekar, A. What is marketing in libraries? Concepts, orientations, and practice. *Information Outlook* 2002, November, 24-30.
- ⁹ Savard, R. (ed.) *Education and Research for Marketing and Quality Management in Libraries*. München: Saur, 2002.
- ¹⁰ Bouthillier, F. The teaching of marketing and quality management in schools of library and information studies: the case of North America. In: Savard, R. (ed.) *Education and Research for Marketing and Quality Management in Libraries*. München: Saur, 2002: pp21-30.
- ¹¹ Ferreira, S.M.S.P. The state of marketing teaching in schools of library and information science in South America. In: Savard, R. (ed.) *Education and Research for Marketing and Quality Management in Libraries*. München: Saur, 2002: pp31-42.
- ¹² Webber, S. Teaching of marketing and quality management in schools of library and information science (LIS) in the UK: a review and report of findings. In: Savard, R. *Education and Research for Marketing and Quality Management in Libraries*. München: Saur, 2002: pp43-65.
- ¹³ Koontz, C. Continuing education for library and information professionals: a practical approach. In: Savard, R. *Education and Research for Marketing and Quality Management in Libraries*. München: Saur, 2002: pp126-133.
- ¹⁴ Lepik, A. Education for marketing management: profitable opportunities for information professionals in Estonia. In: Savard, R. *Education and Research for Marketing and Quality Management in Libraries*. München: Saur, 2002. IFLA Publications 99: pp134-142.
- ¹⁵ Savard, R. *Guidelines for the Teaching of Marketing in the Training of Librarians, Documentalists and Archivists*. Paris: General Information Programme and UNISIST, UNESCO, 1988.
- ¹⁶ Greiner, J. Non-M.L.S. professionals in the library. *Public Libraries* 1990, 29 (4), 209-14
- ¹⁷ Ashcroft, L. Developing competencies, critical analysis and personal transferable skills in future information professionals. *Library Review* 2004, 53 (2), 82-88.
- ¹⁸ Larsen, G. Kompetenceudvikling i praksis – i lyset af udviklingen af det hybride bibliotek. *Ikoner* 2002, 5 (3), 5-9.

¹⁹ i.e. Besant, L. & Sharp, D. Upsize this! Libraries need relationship marketing. *Information Outlook* 2000, 4 (3), 20-2 ; Lettis, L. The future of information professionals – seize the day. *Information Outlook* 2000, 4 (5), 26-30.

PREPARING ACADEMIC LIBRARIANS FOR A CHANGING ROLE: A CASE OF A CANADIAN INFORMATION LITERACY PROGRAMME

Dr Ganga Dakshinamurti

Albert G. Cohen Management Library
University of Manitoba
Winnipeg, Manitoba
Canada. R3T 2N2
gdaksh@cc.umanitoba.ca

Betty Braaksma

Information Literacy Coordinator
University of Manitoba Libraries
University of Manitoba
betty_braaksma@umanitoba.ca

Abstract

The growing importance given to integrated information literacy programmes in universities is correspondingly enhancing and changing the teaching role of the traditional academic reference librarian. How are librarians facing the challenge? This paper examines one of the schools surveyed by Kari Gulbraar in her paper "Developing for the New Academic Library Function: Knowledge and Skills Requirements among Library Personnel and Teaching Faculty". Using a case study approach we consider the implications of integrating information literacy into a newly created academic programme. Through SWOT analysis, we identify the steps involved in the evolution from a traditional reference librarian role, in which the delivery of orientation and library tours is the norm, to that of a team player who partners with faculty in course and curriculum design. The librarian who undertakes this new role must be aware of the different and perhaps conflicting expectations of four distinct groups of stakeholders: students, faculty members, other librarians and library and faculty administrations. What new skills and competencies are needed to achieve this evolution? In what way must they be adapted to work with each of the stakeholder groups?

Introduction

Kari Gulbraar's 2004 study, 'Developing for the New Academic Library Function'¹ compares librarian and faculty attitudes towards information literacy in selected Norwegian and Canadian institutions of higher learning. When Gulbraar asked respondents "do/did you need new knowledge/skills for instruction?" one answer was: "Once again, you imply a need for change? When was teaching OLD?"

How do we react to this statement? While philosophically it might be said that teaching is ageless, most library literature of the last 5 years acknowledges that the changing information universe is also driving changes in library instruction. A new emphasis on enquiry-based, student centred learning has also had a significant impact on higher education, which has in turn influenced library instruction. It can be argued that there is in fact a big need for changes in teaching, as the role of librarians in the academy evolves from passively supporting its teaching functions to actively collaborating and participating in them.

Literature review

The debate over the role of the academic librarian is not new. In 1880, Harvard University's librarian recommended that "the college librarian should become a teacher, not that mock substitute who is recited to; a teacher, not with a textbook, but with a world of books".²

In 2000, the Association of College and Research Libraries (ACRL) issued its *Information Literacy Standards for Higher Education*, building upon a key report issued in 1989 by the American Library Association's Presidential Committee on Information Literacy.³ The ACRL standards described information literacy (IL) as both a philosophy and a process, with clearly defined benchmarks and outcomes. The standards articulated what had always been done in bibliographic instruction (BI), but also pushed BI beyond the traditional 'one-shot' class by linking IL to overall academic success and lifelong learning.

The evolution of bibliographic instruction to information literacy coincided with, and was influenced by, a shift in thinking about university teaching. In 1998 the U.S. Boyer Commission on Educating Undergraduates in the Research University issued a study which recommended that universities should focus more on the teaching component of their missions and to follow the inquiry-based learning model. In particular they were urged to target undergraduates in new programme development.⁴ A follow-up report in 2001 tracked the implementation of these recommendations throughout U.S. universities.⁵

The first Boyer report grouped libraries with academic support services such as labs, while the second didn't mention libraries at all. With their emphasis on improving the undergraduate experience through inquiry-based teaching, both reports intersected with and supported similar developments in information literacy. How did these changes impact librarians? Several books published from 1999 to 2001 reflected an increasing interest in the idea of librarians taking on more prominent teaching roles.

Rosemary Young and Stephana Harmony's book, *Working with Faculty to Design Undergraduate Information Literacy Programs: A How-to-do-it Manual for Librarians* offered many practical 'how to' tips, but also introduced some concepts that went beyond the merely practical: developing learning outcomes, writing policy statements, and participating in curriculum design. The authors stated that:

we elected to use [the term] "information literacy" to emphasize the outcome of the instructional process – students who cannot only locate and retrieve information, but also evaluate and apply the use of this information appropriately. To accomplish this goal, it is necessary to create partnerships with the faculty in our academic institutions to design and implement successful programmes.⁶

Young and Harmony painted a picture of a collaborative, collegial relationship, with librarians and faculty working together at the curriculum design level. They also acknowledged that if a true partnership was not immediately feasible, it was still possible to "go beyond the five-minute phone call about the date, time and list of resources to cover".⁶

Another book published in 1999 by the Association of College and Research Libraries was even more explicit about the teaching role of academic librarians. *Librarians as Learners, Librarians as Teachers: the Diffusion of Internet Expertise in the Academic Library* focused specifically on how librarians could use the Internet in instruction, and predicted that:

I foresee an opportunity for academic librarians to assume a stronger and probably more formal teaching role within the academy. What they teach now will be far beyond today's hands-on, skill-building workshops...academic librarians will have an unprecedented opportunity to build themselves into the center of the educational processes in colleges and universities and function as true peers among faculty.⁷

Perhaps even more significantly, this book promoted the idea of learning competencies for both students *and* librarians. The suggested professional competencies were:

- assessment and inquiry competencies,
- instructional competencies,
- technology competencies,
- scholarly competencies,
- social competencies.

ACRL also discussed the role of information literacy coordinators. As managers, they were urged to work with their colleagues in a coaching, rather than hierarchical style. Coordinators were also directed to collaborate with other stakeholders in the academy in order to achieve programmatic success.⁸ If followed, these recommendations would move information literacy into the political arena of the university, something rarely seen with bibliographic instruction, which was usually firmly rooted within the walls of the library.

Three collections of essays published in 2000 continued the trend of looking at instruction from a pedagogical and theoretical perspective rather than a purely practical one. *Information Literacy Around the World* contained several chapters which showcased information literacy programmes at various institutions, but in addition to the descriptions there were also thoughtful observations on wider issues. In the book's foreword, Patricia Senn Breivik identified them as:

- the need for research and practice to work hand-in-hand (a challenge that has, largely, not been met in education);
- the need for benchmarking people's level of information literacy and for bringing about authentic assessment;
- the varying manifestations of information literacy in the workplace and in professional continuing education;
- the need to understand and address varying learner backgrounds; and
- the need to reassess desired learning outcomes... (are we seeking to have young people be successful students or successful lifelong learners?) and to ensure that we adjust learning experiences accordingly.⁸

The emerging politics of information literacy was also repeatedly referred to throughout the collection. Penny Moore's essay noted that "policy can not mandate what matters" and that in order for information literacy programmes to succeed,

professional development efforts need to support the creation of conditions that establish and then maintain implementation of new ways of working... It follows that if collaboration between educators and librarians is a stated goal, the programme needs to include tasks that encourage joint planning, implementation and evaluation.⁹

In addition to promoting and encouraging collegiality, the new ways should also include a shift in focus "from teaching to learning".

Echoing the themes that were explored in *Information Literacy Around the World*, *Future Teaching Roles for Academic Librarians* considered:

- that the new paradigm for higher education reflects a need to focus on learning, not teaching,
- that the new learning-centered focus of higher education prizes the importance of learning by doing, and
- that in this new environment, librarians have new opportunities to play a forceful, dynamic role in collaboratively designing and developing the contexts for learning strategies.¹⁰

This book also explored the newly-emerging idea of the learning library, which “has student learning at its heart and infuses information literacy into the entire curriculum in ways that are meaningful to the students in the long term.”¹¹ The larger political picture was once again explored, with Kimberley Donnelly observing that:

In order to garner support, material about information literacy initiatives has to be delivered to administrators and faculty through channels they commonly use. This kind of communication may be the key to establishing respect and understanding throughout the campus community. Further, proponents of information literacy requirements should base their arguments both on the colleges and departments’ mission and goals and accreditation standards.¹¹

Finally, *The Collaborative Imperative: Librarians and Faculty Working Together in the Information Universe* explored the different faces of faculty–librarian collaboration. The opening essay by Dick Raspa and Dane Ward noted that:

we have reached a point at which neither librarians nor instructional faculty can adequately teach the research process in isolation from each other...it takes both classroom instructors and librarians to teach students to develop adequate research skills.¹²

The book went on to explore several examples of successful collaboration and concluded by asking: how do we create a climate where librarians are valued as teachers, and how do librarians value themselves as teachers?

the answer is always the same: by seeking collaborative opportunities with faculty all the time...we librarians must define our place as teachers in the educational mission of our institutions...We begin this process by building coalitions within the library itself in support of the teaching role of librarians. After the internal commitment...is established, we need to market our instructional role to the campus. This requires political skills, including ‘...negotiation, persuasion, compromise and strategizing in order to achieve certain objectives’.¹³

It appears that by 2000, information literacy was starting to take on the characteristics of a discipline, rather than as just another kind of instructional technique. The themes commonly identified in the books referred to above included:

- achieving collaborative partnerships with faculty,
- contributing to student learning,
- seeking administrative support,
- playing institutional politics,
- learning how to be a better teacher by learning.

These themes have continued to be the focus of ongoing discussions in many papers and conference presentations since 2000. A comprehensive overview of developments in IL is provided in Edward Owusu-Ansah’s ‘Information Literacy and Higher Education: Placing the Academic Library in the Center of a Comprehensive Solution’,¹⁴ while Clara Fowler and Scott Walter’s ‘Instructional Leadership: New Responsibilities for a New Reality’ looks at the organizational side of IL.¹⁵

The role of technology

While the late 1990’s and early years of the 21st century saw major developments in both educational theory and information literacy, even more significant was the impact of information technologies. Evan Farber noted that information technology helped to move the debate about librarians’ roles in a new direction:

In the last few years what has helped to blunt that resistance [of faculty to bibliographic instruction] and at the same time suggested a more prominent role for librarians, as been the impact of electronic information.¹⁶

Raspa and Ward observed that:

globalization, information, and computer technology have inexorably altered the ways we read, research, write and learn....We know today that standard practices from the past do not suffice. They do not help much with the complexities of contemporary life, nor with the realities of information....understanding requires a number of competencies, including the power to analyze, synthesize, and present information in multiple contexts for very different audiences.¹⁷

When Farber's paper was published in 1999, the Google search engine had just come out of its beta testing stage and was starting to be recognized on many of the year's "top ten" technology lists.¹⁸

The same year that Raspa and Ward wrote their editorial comments on the changing nature of information, Outsell, a market research company specializing in analysis of information technologies, produced a document titled *Information about Information Briefing: Today's Students, Tomorrow's FGUs* (Functional Group of Users). This report looked at student information use at 10 American universities and the consequences for academic libraries. Outsell observed that "successful links between teaching and library resources depend entirely on the personal relationships between faculty and librarians, and a critical mass is growing".¹⁹

In 2001 the first of several *Pew Internet and American Life* studies dealing with the Internet's effects on education was released, and it made clear the extent to which the "information superhighway" was going to have a huge impact on how students learn.²⁰

These studies and many others that followed verified what librarians and faculty were already experiencing: a fundamental shift in the way students used information resources to do research. Concern about the "Googlization" of research was shared by faculty and librarians alike and offered an even more compelling reason for both groups to work together. Librarians were finally being recognized as having an advantage in the new information universe due to their long experience in the organization and classification of electronic information systems, and because of their expertise in using and teaching databases. This renewed faculty-librarian alliance was explored in Scott Carlson's 'New Allies in the Fight against Research by Googling'.²¹ Carlson noted that the context of the partnership might be new, but that:

the instructional goals remain the same...the learning objectives need to be recalibrated for electronic information environments. ...The inconsistencies of student background have created the need for librarians to design instruction programmes that consider a variety of experiences. The systematic approach once used in traditional bibliographic instruction programmes can no longer be effective.²²

As academics were beginning to use web-based content in their teaching, so were librarians beginning to include web evaluation in their instruction classes. In this context, the methodology suggested by the information literacy approach to instruction became very attractive and was seen as being a good fit with the new realities of learning. In the expanded information universe, the ability to "recognize when information is needed and have the ability to locate, evaluate, and use effectively the needed information"²³ was acknowledged as being crucial to academic success. The door to true collaboration, as advocated by many librarians and researchers, was opening wider.

The Canadian picture

Most of the research and activity in information literacy in the last decade has been done in the United States and Australia. In Canada, as in Europe, the information literacy picture and the role of librarians as teachers are less well developed. As documented by Whitehead & Quinlan and Julien & Boon, information literacy in Canada, particularly in higher education, remains largely rooted in the bibliographic instruction tradition.^{24,25,26,27,28} Several universities, such as the University of Alberta and the University of Winnipeg are moving to a newer IL-based models, but these efforts represent the work of individual institutions, and often individual librarians.

In Canada, higher education is a provincial responsibility, so it requires the oversight of a national professional body like ACRL or CAUL to bring the Canadian information literacy agenda to a larger stage. There is recognition that a more coordinated approach is needed, and several bodies such as the Canadian Library Association,²⁹ The Partnership,³⁰ and the Manitoba Library Association³¹ have projects underway to advance the cause of information literacy for their constituencies.

Locally, the University of Manitoba's information literacy programme is relatively new, having officially begun in 2001 with the hiring of a full-time information literacy coordinator. The programme rests firmly on a longstanding foundation of bibliographic instruction, delivered by subject librarians with very close ties to their faculties.

University of Manitoba (UM) librarians Ada Ducas and Nicole Michaud-Ostryk's 2003 paper 'Toward a New Enterprise: Capitalizing on the Faculty-Librarian Partnership' described the instructional picture in their larger study of faculty-librarian relationships at UM.³² They noted that while faculty felt that librarians contributed very positively to the student learning experience when they taught instructional sessions, very few faculty actually had librarians participate in their classes. The follow-up paper, published in 2004, found that while "librarians wish to be part of the team in the educational process...faculty seem to want librarians to remain within traditional bounds".³³

These findings were verified by Gulbraar's 2004 study, which found that in the Canadian universities she surveyed (including UM), teaching faculty were still unsure about the concept of information literacy, if it fit into their curriculum and what role (if any) the librarian should have in its delivery.³⁴

Key issues from the literature review

How can these studies on the changing nature of library instruction in academia be applied to the creation of an information literacy programme and the development of librarians as teachers? An analysis of the literature points to certain key issues that characterize the change from a traditional BI programme to an effective IL programme.

An IL programme should:

- follow an inquiry-based, student centered learning mode,
- have the immediate goal of students achieving academic success, with the long term objective of providing lifelong learning,
- address needs of varying learner backgrounds as well as learning capacities,
- include learning objectives that recognize the learners' varying experience with electronic environment.

The teaching librarian should:

- be an active collaborator and participant, and work as a partner with the faculty at the curriculum design level,
- take a proactive and dynamic role in the teaching process by seeking collaborative opportunities with faculty for designing and developing the

contexts for learning strategies, resulting in a stronger and more formal teaching role.

The IL Coordinator should:

- work with library colleagues in a coaching role,
- seek administrative support for the teaching role of the librarians by building coalitions within the library, and marketing library's instructional role to the campus,
- collaborate with stakeholders in the academy to achieve success in implementing IL across the campus.

The case study

The findings in the literature review have led us to consider the implications of such a programme as applied to our own institution. Using the newly-established Textiles Sciences Program at the University of Manitoba, as an example, we will look at the factors involved in designing and implementing an integrated IL programme, and develop a model that can be translated to other areas.

To begin, we have to answer the following questions about IL generally in our institution:

- At a practical level, what is the status quo of the IL programme?
- The stakeholders in an integrated IL programme fall into three categories:
 1. administrators of (a) the library; (b) the faculty; and (c) the University;
 2. the teaching personnel: (a) the librarians and (b) the professors;
 3. the students.

What are the *strengths* (S) and *weaknesses* (W) as presented by each group of the stakeholders with regard to the status quo? What are the *opportunities* (O) and *threats* (T) that we may expect when we plan to implement an integrated programme of IL?
- What new skills and competencies are needed for the librarians to undertake this evolution in their teaching role?
- Based on the SWOT analysis, can a process be developed, and a model created, for establishing an integrated IL programme, and for preparing for the changing role of an academic librarian?

The status quo – University of Manitoba:

The UM is one of Canada's largest and oldest research universities. Its academic and professional schools achieved a total enrolment 27,631 in 2004.³⁵ Librarians at UM have faculty status and participate as peers with the teaching faculty in Senate, on committees and in the Faculty Association.

As previously noted, the University of Manitoba Libraries (UML) has a strong tradition of instruction, but teaching is one area where true equity with faculty has not been achieved. In spite of a desire to be more actively involved in curriculum planning and design, librarians in most units, with some exceptions, continue to teach using the traditional bibliographic instruction model. As noted by Ducas and Oystryk, there appears to be a disconnect between faculty expectations and librarian aspirations.

With the hiring of a fulltime Information Literacy Coordinator in 2001, the Libraries signaled that a shift would occur in how instruction would be done. This shift was soon felt with the launch of 'eTools for Success', a programme of instruction based upon the ACRL Information Literacy Standards for Higher Education. Developed for delivery to first year

students, the 4 eTools modules were designed in consultation with the course director, and took up nearly 1/3 of the 13 week course. Attendance was mandatory, students were tested and the results were worth 5% of the course mark. The experiment proved to be a success, and the potential of eTools as a model was quickly seen.

The status quo – textiles

Library instruction for the 2nd and 3rd year textiles sciences students was given jointly by librarians in the Albert Cohen Management Library (supporting management, business, and finance) and the Elizabeth Dafoe Library (supporting arts and humanities). Through many years of working with the faculty in the textiles sciences and human ecology programs, a strong rapport had developed, but instruction was still handled the traditional way.

The successful implementation of the new eTools instructional model coincided with a programme review for the Textiles Sciences program. The new programme was to have an increased science and business emphasis, moving away from a more traditional fashion industry focus. Recognizing an opportunity to have eTools-like instruction included in the new programme, the Management librarian contacted the course director with a proposal to include information literacy in the new programme design.

In order to initiate this process two factors came into play. Firstly, and most importantly, the Management librarian took a proactive role and recognized an opportunity to create a new model of library instruction for her faculty. With the support of her library unit head, she approached the department head with a proposal to incorporate IL into the new programme and had several discussions that examined the feasibility of the idea. A firm grounding in IL concepts and the practical example of the eTools model enabled the librarian to present a convincing case, and the idea was approved by the department head and the Dean.

Secondly, the process called for the Information Literacy Coordinator to:

- get administrative support from the Director and the unit heads of the Library for implementing IL;
- discuss the plan with the Department Head of the Textiles Program and the Dean of Human Ecology and get their support;
- involve related subject librarians to prepare the lesson plans and, where needed, provide professional development training for them to team with professors to implement an integrated IL programme;
- get support and acceptance for the IL programme from the Textiles faculty;
- review the IL programme with the library's academic and support staff who may be needed to provide help;
- evaluate systematically the IL programme and provide workshops as well as one-on-one coaching and mentoring for those librarians who need help.

SWOT analysis

While success was achieved in convincing faculty to integrate IL concepts and outcomes into the new programme, it was felt it would be useful to review the status quo using a SWOT analysis to help us get a clearer picture of what would be required for further programme development.

Strengths in the current scenario:

- Libraries administration is knowledgeable about IL and its increasing importance in universities, and is supportive of the idea of integrated IL programmes.

- A full-time Coordinator position with the mandate and authority to implement IL in the university has been established.
- An Information Literacy Committee, with representatives from unit libraries and campus, serves as a collaborative body to work with the IL Coordinator. Taskforces have been created in the committee to identify desired learning outcomes for IL programmes; to develop evaluative methods and instruments; and to plan professional development strategies.
- An IL administrative framework has been created, with terms of reference and a strategic plan that supports ACRL standards.
- In collaboration with faculty and librarians, the Coordinator has successfully implemented an IL programme with University I classes, where the Coordinator and a number of librarians teach, and a test is administered to evaluate the learning outcomes.
- Subject librarians have already established a good working relationship and rapport with Textiles faculty through their existing orientation and bibliographic classes.
- Librarians with subject expertise and considerable experience of providing help with students' research needs are available.
- The Head of the newly established Textiles Sciences Department is very enthusiastic and supportive of the concept of integrated IL programme and is prepared to involve departmental faculty members to collaborate with the librarians in preparing integrated lesson plans.
- The Dean and department heads of Human Ecology faculty enthusiastically received the presentation on the proposed integrated IL programme and have committed their full support.
- Joining with Kent State University, the Coordinator has just initiated the SAILS (Standardized Assessment of Information Literacy Skills) survey that enables the library to administer a random test to the students to assess their IL competency levels and expertise, allowing us to evaluate the current scenario of IL at the university.

Weaknesses in the current scenario

- Uncertainty prevails about how some librarians and faculty members will react to an integrated IL programme that calls for different working relationships and different schedules.
- Some are satisfied with the traditional perception of library providing support or service to faculty and are slow to accept the changed view of librarians and faculty working as collaborators.
- Sometimes more importance is given to bureaucratic structure and line authority, thereby losing flexibility.
- Some place greater emphasis on building collection strength, and do not recognize IL as a viable activity for librarians.
- Not enough money and human resources are allocated to enable a full-fledged IL programme across the campus, and there is no assurance of future allocations.

Opportunities in establishing IL

- Allows us to implement a pilot programme, and thereby create a process to establish an IL programme across the campus.
- Helps students to achieve both short term and long term objectives of becoming information literate.
- Frees up time for faculty to concentrate on subject matters to teach;
- Provides professional development for librarians.
- Enables faculty to recognize librarians as their professional colleagues.

Threats in establishing IL:

- Faculty members may question the effectiveness of librarians as teachers, and their ability to prepare lesson plans with learning outcomes.
- It may be difficult for librarians to spare the time needed to work with the faculty in preparing lesson plans and assignments.
- Handouts needed may prove to be costly calling for allocation of money that is not budgeted for.
- There may not be adequate and on going administrative support to compensate for the time, money and support personnel needed to plan and execute IL programme properly.

Case study analysis:

In order for the new programme to succeed and desired IL outcomes to be achieved, the development process calls for enhancement of strengths and opportunities, while at the same time taking steps to minimize the weaknesses and threats. The following pathway may lead to achieve that desired effect efficiently and effectively:

- continue the existing process of seeking administrative support through consultations beforehand,
- continue to the strengthen IL Committee through regular meetings to ensure the members' energy and enthusiasm are channeled towards continued development of an effective IL programme,
- evaluate and monitor the effectiveness of IL programme for University I classes to benefit IL programme for Textiles,
- utilize the existing rapport of subject librarians with the faculty in advancing the cause of an integrated IL programme,
- lobby with library administration to provide adequate budget as well as release time for librarians to work on the IL programme.

The model

The model of IL programme implementation that we have developed from our case study is a continuum that involves all stakeholders in a continuously expanding manner, starting with the library administration, and then to faculty administration, librarians and finally students, as seen in the figure below. This model calls for the librarian and coordinator to deal with one primary stakeholder at any given time, while at the same time having ready access to go back to any other stakeholder in the continuous process. With such a model in place, a process is established for providing a dynamic integrated IL programme across the campus.



DRAFT

New skills and competencies for librarians

Ultimately, however, the success of any integrated IL programme depends on the readiness with which the librarians are prepared to work with their changing role “from passively supporting their teaching functions to actively collaborating and participating in them”.

In order to prepare librarians to take on the proactive, collaborative, and pedagogical roles that we envision, a programme of professional development must be established. UML administration has already committed to annually funding at least one librarian’s attendance at the ACRL Institute for Information Literacy Immersion School,³⁶ but work also needs to proceed on an ongoing basis. Workshops, informal discussions, evaluative microteaching sessions, and online learning opportunities on teaching skills should be organized, to ensure that librarians are proficient in the following:

- working collaboratively with faculty in designing IL integrated curriculum in their subject areas,
- preparing lesson plans with clearly identified learning outcomes;
- identifying the building blocks in the topics to be taught in an integrated IL programme,
- developing expertise in using technological aids such as PowerPoint for an effective presentation,
- scheduling appropriate assignments and evaluative instruments to ensure that the learning objectives are being met,
- developing presentation skills to ensure holding students’ sustained interest in what is being taught,
- being vigilant to the needs of learners’ different learning styles and capabilities, and varying the teaching methods to suit all learners,
- incorporating both web-based as well as traditional resources to keep the subject matter current,
- being proactive in identifying subject areas that call for IL programme and initiate discussion with faculty to set up collaborative work to provide integrated IL programme.

Conclusion

Lizbeth Wilson's 'What a Difference a Decade Makes: Transformation in Academic Library Instruction',³⁷ identifies the key trends that changed the way librarians teach:

- technology
- information literacy
- collaborations
- research
- user-centeredness
- leadership
- standards and guidelines

Unlike Gulbraar's respondent, who didn't see the need for change, both a review of the literature and a case study analysis have shown that librarians do have to change their approach to teaching, and must take on more proactive roles within the university in order to move change forward. Support can be provided two ways: by creating a programme of integrated information literacy instruction, and by developing and maintaining a programme of professional development for librarians who teach. In this way, librarians can move beyond their traditional roles as helpmeets to faculty, and truly take their place at the heart of the academy.

References

- ¹ Gulbraar, K. *Developing for the New Academic Library Function: Knowledge and Skills Requirements Among Library Personnel and Teaching Faculty*. [Powerpoint presentation, version 3. October 2004.]
- ² Farber, E. College libraries and the teaching/learning process: A 25-year reflection. *The Journal of Academic Librarianship* 1999, 25 (10), 171-177.
- ³ National Forum on Information Literacy. (1989) *American Library Association Presidential Committee on Information Literacy*. URL <<http://www.infolit.org/documents/89Report.htm>>
- ⁴ The Boyer Commission on Educating Undergraduates in the Research University. *Reinventing Undergraduate Education: A blueprint for America's research universities*. 1998. URL <<http://naples.cc.sunysb.edu/Pres/boyer.nsf/>>
- ⁵ The Boyer Commission on Educating Undergraduates in the Research University *Reinventing Undergraduate Education: Three years after the Boyer Report*. URL <<http://www.sunysb.edu/pres/0210066-Boyer%20Report%20Final.pdf>>
- ⁶ Young, R. *Working with Faculty to Design Undergraduate Information Literacy Programs*. New York: Neal-Schuman, 1999.
- ⁷ Libutti, P.O. *Librarians as Learners, Librarians as Teachers: The Diffusion of Internet Expertise in the Academic Library*. Chicago: ACRL, 1999.
- ⁸ Breivik, P.S. Foreword. In: Bruce, C. & Candy, P. (eds) *Information Literacy Around the World: Advances in Programs and Research*. Wagga Wagga: Centre for Information Studies, Charles Sturt University, 2000.
- ⁹ Moore, P. Learning together: staff development for information literacy education. In: Bruce, C. & Candy, P. (eds) *Information Literacy Around the World: Advances in Programs and Research*. Wagga Wagga, Centre for Information Studies, Charles Sturt University, 2000: pp237-256.
- ¹⁰ Bahr, A.H. (ed.) *Future Teaching Roles for Academic Librarians*. New York: Haworth Press, 2000.
- ¹¹ Donnelly, K.M. Building the learning library: where do we start? In: Bahr, A.H. (ed.) *Future Teaching Roles for Academic Librarians*. New York: Haworth, 2000.

- ¹² Raspa, D. & Ward, D. Listening for collaboration: faculty and librarians working together. In: Raspa, D. & Ward, D., (eds) *The Collaborative Imperative: Librarians and Faculty Working Together in the Information Universe*. Chicago: Association of College and Research Libraries, 2000. pp15-16.
- ¹³ Caspers, J. & Lenn, K. The future of collaboration between librarians and teaching faculty. In: Raspa, D. & Ward, D. (eds) *The Collaborative Imperative: Librarians and Faculty Working Together in the Information Universe*. Chicago: Association of College and Research Libraries, 2000: p151.
- ¹⁴ Owusu-Ansah, E. K. Information literacy and higher education: placing the academic library in the center of a comprehensive solution. *The Journal of Academic Librarianship* 2004, 30 (1), 3-16.
- ¹⁵ Fowler, C.S. & Walter, S., Instructional leadership: new responsibilities for a new reality. *College and Research Libraries News* 2003, July/August, 465-468.
- ¹⁶ Farber, E. College libraries and the teaching/learning process: a 25-year reflection. *The Journal of Academic Librarianship* 1999, 25 (3), 174.
- ¹⁷ Raspa, D. & Ward, D. Listening for collaboration: faculty and librarians working together. In: Raspa, D. & Ward, D., (eds) *The Collaborative Imperative: Librarians and Faculty Working Together in the Information Universe*. Chicago: ACRL, 2000.viii-ix.
- ¹⁸ Google Corporate Information. URL <http://www.google.com/corporate/history.html>
- ¹⁹ Outsell, Inc. Today's students, tomorrow's FGUs. *Information About Information* 2000, 3 (24), 14.
- ²⁰ Pew Internet & American Life Project, *Reports: Education*. URL <http://www.pewinternet.org/topics.asp?c=10>
- ²¹ Carlson, S. New allies in the fight against research by googling. *The Chronicle of Higher Education: Information Technology*. 2003, 29 (28). URL <http://chronicle.com/free/v49/i28/28a03301.htm>
- ²² Warnken, P. Managing technology: the impact of technology on information literacy education in libraries. *The Journal of Academic Librarianship* 2004, 30 (2),151-156.
- ²³ Association of College and Research Libraries. *Information Literacy Competency Standards for Higher Education*. January 2000.URL <http://www.ala.org/ala/acrl/acrlstandards/informationliteracycompetency.htm>
- ²⁴ Julien, H. & Boon, S. Assessing instructional outcomes in Canadian academic libraries. *Library & Information Science Research*. 2004, 26, 121-139.
- ²⁵ Whitehead, M.J. & Quinlan, C.A. *Canada: An Information Literacy Case Study. White Paper Prepared for UNESCO, the U.S. National Commission on Libraries and Information Science, and the National Forum on Information Literacy, for Use at the Information Literacy Meeting of Experts, Prague, the Czech Republic. July 2002*. URL <http://www.nclis.gov/libinter/infolitconf&meet/papers/quinlan-fullpaper.pdf>
- ²⁶ Whitehead, M.J. & Quinlan C.A. Information literacy in higher education. *Feliciter*. 2003, 49 (1), 22-24.
- ²⁷ Julien, H. & Boon, S. From the front line: information literacy instruction in Canadian academic libraries. *Reference Services Review* 2002, 30 (2) 143-149.
- ²⁸ Julien, H. & Boon, S. Information literacy in Canada's academic libraries *Feliciter* 2003, 49 (3) 305-307.
- ²⁹ Canadian Library Association Information Literacy Interest Group. URL <http://cybrary.uwinnipeg.ca/ilig/>
- ³⁰ The Partnership. URL <http://www.lib.sk.ca/sla/partnership.html>
- ³¹ Manitoba Information Literacy Group. URL <http://www.mla.mb.ca/infolit/links.cfm>

- ³² Ducas, A.M. & Michaud-Oystryk, N. Toward a new enterprise: capitalizing on the faculty/librarian partnership. *College and Research Libraries* 2003, 64, 55-74.
- ³³ Ducas, A.M. & Michaud-Oystryk, N. Toward a new venture: building partnerships with faculty. *College and Research Libraries* 2004, 65 (4) 334-347.
- ³⁴ Gulbraar, K. Developing for the new academic library function: knowledge and skills requirements among library personnel and teaching faculty. Paper prepared for the *IFLA Continuing Professional Development and Workplace Learning Section, the 6th World Conference on Continuing Professional Development and Workplace Learning for the Library and Information Professions*, Oslo, August 2005.
- ³⁵ Office of Institutional Analysis. *The University of Manitoba November 1st Enrolment Executive Summary*, 2004-2005. URL <http://www.umanitoba.ca/admin/institutional_analysis/new_rept/execsummary_nov_05r.pdf>
- ³⁶ Association of College and Research Libraries. *ACRL Institute for Information Literacy Immersion*. URL <<http://www.ala.org/ala/acrl/acrlissues/acrlinfolit/professactivity/iil/welcome.htm>>
- ³⁷ Wilson, L.A. What a difference a decade makes: transformation in academic library instruction. *Reference Services Review* 2004, 32 (4), 338-346.

MEETING THE CPD NEEDS OF THE E-LIBRARIAN

Lynda Ayiku*, Anthea Sutton*, Alison Turner+, Andrew Booth* and Alan O'Rourke*

*School of Health and Related Research,
University of Sheffield
+National Library for Health

Correspondence:
Lynda Ayiku,
Information Officer,
School of Health and Related Research,
University of Sheffield,
Regent Court, 30 Regent Street,
SHEFFIELD, UK, S1 4DA
L.Ayiku@sheffield.ac.uk

Abstract

Purpose: To demonstrate the potential usefulness of the Facilitated Online Learning Interactive Opportunity (FOLIO) Programme's low technology approach to e-learning in delivering continuing professional development to librarians in the health community.

Setting/Participants/Resources: Healthcare librarians supporting staff working within the UK National Health Service

Methodology: Discussion list mediated communication supplemented by icebreaker exercises, group and buddy interactions, case studies, briefings, guided reading, interactive powerpoint presentations, quizzes and voting, competitions, guest telephone lectures, self-reflection, practical exercises and course summaries.

Results: Evaluation is both formative, during the FOLIO Programme as a whole, and summative, after each of the 12 modules. The FOLIO Programme appears to meet requirements for a social, cognitive and teaching presence within delivery of an e-learning course. Initial results have been promising and the Course Team have taken the opportunity to modify the Programme in the light of feedback.

Discussion/Conclusion: Issues relating to the technology, assessment, buddy system, and applicability materials are explored together with practical responses devised by the team to meet such challenges. The FOLIO Programme provides a potential model for delivery of continuing professional development to meet the particular needs of the health library community.

Introduction

The Facilitated Online Learning Interactive Opportunity (FOLIO) Programme was conceived in August 2002 by Andrew Booth, Director of Information Resources, School of Health and Related Research (SchARR), University of Sheffield and Alison Turner, Library Partnerships Co-ordinator for the National electronic Library for Health (NeLH). Its overall aim was to provide a flexible alternative mechanism for delivering continuing professional development (CPD) for the NeLH Librarian Development Programme (NeLH LDP). Following a successful pilot (January-May 2003) the NeLH commissioned a team at SchARR to deliver a two-year programme (April 2004-March 2006) of 12 courses for health librarians who support staff within the UK National Health Service.

The FOLIO Programme employs a low-technology method of delivery with each course primarily provided through 30 daily email messages, administered through an electronic discussion list. Around this basic course skeleton the course team constructs a rich and varied programme of events including icebreaker exercises, group and buddy interactions, case studies, briefings, guided reading, interactive powerpoint presentations, quizzes and voting, competitions, guest telephone lectures, self-reflection, practical exercises and course summaries. Typically 40 to 50 participants share in each course, supported by a small course team and guest tutor. Assessment, recognized by a certificate of completion rather than by formal accreditation, is conducted via a portfolio submitted at the conclusion of each course.

Why online workplace learning?

The UK National Health Service (NHS) is undergoing a far-reaching modernisation programme. The NHS information strategy, *Information for Health*¹, urged a radical improvement in the quality and use of information as a way of improving patient care. A National electronic Library for Health (NeLH) was established to provide easy access to high quality knowledge and information for a wide target audience. It offers new ways for health librarians to promote their services, supporting health professionals to navigate an increasingly 'complex maze' of information resources.² The emerging discipline of health informatics is also shaping the role of the health librarian as it responds to improvements in the quality of information within health care.^{3,4}

NeLH Librarian Development Programme

New opportunities require appropriate skills. The NHS workforce development strategy, describes libraries that "offer access to a wide range of electronic and print learning and knowledge resources, complementing those available via the National electronic library for Health".⁵ The NeLH LDP was created to provide a national framework to support librarians moving into new roles within the context of CPD.

Early in the programme it was recognised that librarians experience significant problems in pursuing CPD. New approaches are required if librarians are to be supported effectively in developing requisite skills. Most health library units in the UK operate with a staff of four or less with many working on a part-time basis.⁶ Anecdotal evidence suggests that librarians, particularly those in smaller units, find it difficult to attend professional development events. Budgetary constraints cause barriers for many library staff; even events which are low cost or free of charge make demands for travel and subsistence costs. Additionally, difficulties in arranging appropriate staff cover often prevent librarians from leaving the workplace for extended periods without compromising service availability.

Shortage of time is a key issue for most professionals and health librarians have less flexibility than most. Most library staff organise their day around the service and are used to interruptions and having to reprioritise work according to enquiries and requests made by customers. Learning in the twenty first century has to be flexible to cope with new ways of working and must enable librarians to tailor approaches to their busy lives.

From the perspective of the commissioner, the FOLIO approach to learning has the potential to impact on more learners than face-to-face approaches. Those who can attend face to face events are limited not only due to logistics such as venue and location but because work-based learning is increasingly delivered in small group participative sessions. The FOLIO approach, whilst self-directed, creates small learning communities that address shared concerns and draw on pan-regional experiences. Technological solutions such as teleconferencing and chatrooms offer further potential for real-time discussions. As librarians

in the health sector are increasingly involved in designing and supporting e-learning, it is particularly appropriate that they themselves experiment with new ways of learning.

What are the needs of the e-librarian?

By placing centre stage the development of a modern information infrastructure that includes evidence-based practice and information sharing, modernisation of the UK NHS requires that all NHS staff possess core information skills.⁴ It also requires that library and information providers move “beyond the library walls to take services to health professionals” in response to more diverse user needs.² As the need for information and knowledge services has grown, NHS librarian roles have evolved to include knowledge management, providing training in information and evidence-seeking skills, involvement in clinical decision making and implementation of policies.⁷

The NeLH LDP has prioritised health informatics expertise, information communication technology (ICT) skills, knowledge management, managerial skills, learning and teaching skills, evidence based librarianship, epidemiological skills and processes of clinical decision making.^{2, 8, 9} A UK wide Training Needs Analysis⁷, commissioned by the NeLH LDP, provides a detailed snapshot of librarians’ training needs. The survey confirms a trend towards the ‘e-librarian’ by revealing a high demand for specialist information retrieval and ICT skills training, suggesting an ongoing desire amongst NHS library staff to update their technical skills continually. Other noteworthy training needs include strategic planning, financial planning, evidence-based decision making and knowledge of NHS programmes and policies.

A further training needs analysis, again sponsored by the NeLH LDP, and conducted in 2003 by Terence Lacey and Andrew Booth at the University of Sheffield (<http://www.nelh.nhs.uk/folio/cpd.pdf>), classified the developing needs of the NHS e-librarian within the COMPLIANT framework (Table 1). Again it reveals a predominance of Technical Skills (36.5% of available courses) followed by Management Skills (17.6%), Professional Skills (16.8%) and Contextual Knowledge (12.7%).

Table 1 COMPLIANT framework

Knowledge – generic
CO ntextual knowledge: Knowledge of wider developments within the information world or of more general developments likely to carry an information dimension.
Skills –generic
Man agerial skills: Generic skills required for the management of organisations, staff, facilities or tangible resources.
Pro fessional skills: Generic and transferable information skills which characterise, by either their nature or extent, the unique contribution of an information worker.
Lea rning and Tea ching skills: Skills involving the transmission of knowledge whether in a group or one-to-one setting, either conducted face-to-face or virtually.
Int erpersonal skills: Skills involving communication with a commissioner, customer, user or staff member of information services.
AND
Knowledge – specific
NHS Context: Knowledge of health organisations, processes, and structures.
Skills – specific
Technical skills: Skills involving access to, interpretation of, and subsequent use of health information.

Also in 2003, the NeLH LDP in association with the School of Health and Related Research, University of Sheffield embarked on a pilot programme, Facilitated Online

Learning Interactive Opportunity (FOLIO). Initial courses covered three areas of known demand; Project Management, Evaluating Your Service and Evidence Based Librarianship. These topics were chosen to cover the extended role of the e-librarian, a conventional librarian role and wider professional issues respectively. 188 different NHS librarians graduated from one or more courses and the third course extended beyond the UK to allow a further 83 overseas librarians to graduate. The underlying philosophy of the FOLIO programme is captured by the NHS lifelong learning framework which states that, “lifelong learning is primarily about growth and opportunity, about making sure that staff are supported to acquire new skills and realise their potential to help change things for the better”.⁶

As the requirements for lifelong learning continue to develop and to shape the CPD needs of the e-librarian there is a need to keep abreast of new and emerging developments.

How is the programme administered and delivered?

Recruitment

FOLIO courses are promoted through several channels to reach the widest possible audience for recruitment. Prior to a FOLIO course, emails advertising the course are posted to such Jiscmail distribution lists as LIS-MEDICAL and HLG-MEMBERS. If a specific discussion list is relevant to a particular course topic, then this too is targeted. Emails include aims and objectives for each course and links to the FOLIO web pages for further information, enabling potential participants to make an informed decision on whether to ‘sign up’.

NeLH FOLIO homepage

Forthcoming courses are promoted via the NeLH FOLIO homepage (<http://www.nelh.nhs.uk/folio>) allowing visitors to the site to anticipate the next three courses at any given time. Potential participants submit an ‘expression of interest’ form to the FOLIO administrator and are subsequently contacted and asked to confirm that they wish to register. Each of the eight FOLIO courses run by March 2005 achieved a target figure of between 40-50 participants.

Presentations at events

Members of the course team are positively encouraged to promote the FOLIO Programme at CPD events around the UK and thus broaden uptake beyond the established market (Table 2). Presentations are tailored to each event and FOLIO contact details, the homepage URL, and topics and dates for forthcoming courses are always mentioned. Where possible the FOLIO team accompanies descriptions of course methods with an interactive opportunity illustrating innovative features of delivery.

Table 2 Examples of presentations promoting the FOLIO Programme

Title of Presentation	Presenter(s)	Details
<i>FOLIO: Off-the-shelf learning for librarians</i>	Lynda Ayiku & Anthea Sutton	Supporting Online learning 2: embedding and linking CILIP Multimedia Information & Technology Group (North West), Liverpool John Moores University (June 2004) http://www.bolton.ac.uk/learning/mmitnw/prev.htm
<i>FOLIO: Facilitated Online Learning as an Interactive Opportunity</i>	Andrew Booth	E-learning for healthcare information practitioners British Medical Association (BMA) Library, London http://www.bma.org.uk/ap.nsf/Content/LIBelearningcourses Presentation and two week email follow-up
<i>E-Learning: essential ingredient or artificial additive?</i>	Andrew Booth	Health Libraries Group (HLG) Conference, Belfast (September, 2004) http://www.cilip.org.uk/groups/hlg/conf2004/programme.html
<i>The FOLIO project: Facilitated Online Learning as an Interactive Opportunity</i>	Anthea Sutton	CPD25 Learning and Teaching Seminar University of London Senate House Library (November 2004). http://www.cpd25.ac.uk/M25NHS.html

Running the courses

Jiscmail

The FOLIO courses are delivered primarily by email, utilizing a Jiscmail distribution list set up for this purpose (<http://www.jiscmail.ac.uk/lists/FOLIO.html>). Jiscmail allows easy distribution of messages to all participants and also maintains an archive of messages. This is invaluable when participants miss messages and wish to catch up with course progress. Links to this archive are provided from FOLIO web pages.

Other Jiscmail features are utilised during FOLIO courses. For example, the facility for online surveys is used for quizzes, voting, and the course evaluation form. Jiscmail also provides a ‘discussion room’ which allows live synchronous ‘chat’. This is used for ‘drop-in’ sessions where participants have queries answered immediately by the course facilitator. Due to partial overlap of courses, an additional Jiscmail list was set up to allow support from before the course begins to well after course completion (<http://www.jiscmail.ac.uk/lists/E-FOLIO.html>).

NeLH FOLIO website

A set of web pages are created for each course, linked from the NeLH FOLIO website (<http://www.nelh.nhs.uk/folio>), and containing original course materials written by the FOLIO team (such as briefings, case studies etc.). Links are then provided from email messages, thus ensuring that they are not too lengthy. This also allows for further dissemination of the information, enabling those not formally registered on the course to access the website and thus benefit from shared materials.

At the start of each course, participants are informed how to access FAQs web pages providing general information about each course, such as requirements for successful completion. Where enquiries are not answered by the FAQs page, participants can contact the FOLIO Course Team (folio@sheffield.ac.uk). Course participants are discouraged from using the personal email of the course facilitator to ensure that other members of the FOLIO Course Team access and respond to enquiries should the named facilitator be unavailable. All queries are answered within 48 hours.

Portfolio submission

As befits a CPD programme, FOLIO courses are assessed through submission of a portfolio.¹⁰ A template for each course is made available from the course website. Completion of the course requires participants to submit a largely complete portfolio to an accepted standard. Participants are awarded one of three certificates: Distinction, Honours Pass, and Standard Pass. Very rarely a Fail is awarded but more typically participants opt out from submitting a portfolio. Portfolios are assessed by the FOLIO Team with occasional involvement by an external module tutor.

During a six-week course participants record their work in a portfolio template that covers all the course exercises. They are then given a two-week 'catch-up' period that allows them to address any gaps or to reflect further on exercises previously completed. Such flexibility is key to FOLIO courses. This catch-up period helps to ease participants' anxieties should they miss tasks due to working part-time, work commitments, annual leave, sick leave etc. The exercises for the portfolio combine practical and pedagogic tasks to keep the course varied and interesting.

Practical and pedagogic activities

Practical exercises focus on the participant's own experience and how it relates to the topic under consideration. For example, participants are asked to reflect on how the course topic applies to their local circumstances or to develop an action plan for their own library and information service. Some exercises are based on a fictional case study that simulates 'real-life' circumstances. Such exercises involve problem-solving that participants can relate to their own roles. Where participants are required to create a piece of work, such as an e-learning resource or an information skills training course programme, they can subsequently adapt and develop these for use within their own organisation. Practical exercises are complemented by more pedagogic activities such as guided reading, 'chalk and talk' lectures (delivered using teleconferencing rather than face-to-face) and brief theoretical perspectives.

Supporting the e-librarian

Lack of motivation, feelings of isolation and time restraints are common reasons that students give for withdrawing from e-learning courses.¹¹ To retain students, effective facilitation and student support is essential. The challenge for the FOLIO programme is to create courses that support the educational *and* social needs of the e-librarian. In doing this FOLIO courses incorporate three components for effective e-learning courses; cognitive presence, social presence, and teaching presence.¹²

Cognitive presence

Cognitive presence allows "serious learning to take place in an environment that supports the development and growth of critical thinking skills"¹³. Such 'critical thinking' is stimulated by such activities as realistic case scenarios and self-reflective exercises, which enable the e-librarian to apply knowledge learnt during the course to hypothetical or local circumstances. Setting such exercises, with clear relevance to the day-to-day work of course participants, helps to motivate them and to develop their critical thinking skills.

Social presence

Social presence relates to providing a supportive environment where students feel "the necessary degree of comfort and safety to express their ideas in a collaborative context".¹³ FOLIO facilitators create a 'social presence' by adopting a casual, sometimes humorous, tone in course messages. This establishes mutual trust between participant and facilitator,

‘humanising’ the invisible FOLIO facilitator and creating a closer student-teacher relationship. To further develop this relationship, FOLIO facilitators often illustrate their messages with anecdotes and discussions reflecting their own struggles and successes yet always allied closely to the course topic. This enables the e-librarian to feel confident when asking for help or guidance.

Social presence also requires the creation of an environment within which the e-librarian can comfortably interact with fellow course participants. At the start of each FOLIO course there is an "icebreaker" task which requires that each e-librarian sends a typically lightweight, and often lighthearted, introductory message to fellow participants on the course. For example, a course on establishing information needs might ask participants for their experiences of being surveyed or interviewed. More importantly, participants share brief details about themselves, their work and social interests. This supportive environment builds up confidence for sharing views and opinions during subsequent small group and plenary discussions.

Teaching presence

Closely linked to social presence, teaching presence involves the inclusion of activities that encourage interaction during e-learning courses.¹³ Such features include:

- Student-student interaction
To combat potential isolation during e-learning courses, e-librarians are encouraged to engage in discourse with fellow participants to enable social interaction through “buddy” exercises and group discussions. Typically each participant works in a group with one or more course mates. These small groups are set tasks and exercises that require input from each group member and promote collaborative learning. In addition one or more topics for discussion are either considered by all participants or discussed within the buddy groups. Participants communicate with one another via email.
- Student-facilitator interaction
The supportive student-facilitator environment encourages interaction through designated ‘drop-in’ sessions for personalized feedback, through email, telephone or online ‘chat’. Feedback is returned promptly and answers of potential relevance to other course members are made available as additional ‘Frequently Asked Questions’ (FAQs).
- Interaction of students with FOLIO course materials
FOLIO courses supplement traditional tasks and exercises with interactive and informal activities such as quizzes, competitions and telephone conferences to engage and motivate the e-librarian. This variety of course materials maximizes the potential to meet a range of learning style preferences among course participants.

Further to supporting the educational and social needs of the e-librarian, the Course Team provide an ‘enquiries’ service to provide technological support and advice on how to ‘catch-up’ with courses after periods of absence. Such support, within a guaranteed 48 hour time frame, is crucial to reducing the reported loneliness of the long distance learner.

Evaluation

FOLIO courses are evaluated using an online form available through the FOLIO/E-FOLIO discussion list. The evaluation assesses student satisfaction with the course across a variety of areas:

Course Satisfaction – whether participants have enjoyed the course, whether they know more about the course topic having completed the course, whether the course has met its stated objectives, and how they plan to use what they have learnt.

Course Materials – how the course materials rate overall (i.e. very good, good, average, poor, no opinion/undecided), those materials that they found most/least useful, and most/least enjoyable and how often they accessed the course website and how useful it was.

Buddy Interaction/Group Discussion – whether participants shared in either form of social interaction, if not they are asked to identify reasons revealing whether barriers are course-related or simply personal.

Facilitation - Participants are asked to rate course facilitation from a choice of options (very good, good, average, poor, no opinion/undecided).

General Comments - Participants make general comments on the course and are asked specifically what they would change about the course, whether they would participate in another course, and whether they would recommend FOLIO courses to their colleagues.

Evaluation forms are available throughout the course to enable the FOLIO team to gain the views of those who withdraw as well as those who complete the course. Submitted evaluation forms inform the development of future courses. Occasionally specific issues raised by the Curriculum Development Group or by the FOLIO team are included in the online questionnaire or in the Portfolio Submission. Recent examples include the amount of time taken to complete the course, the experience of losing a buddy during the course, and preferences with regard to the timing of guest lectures. Additional feedback received by email or verbally is also taken into consideration and discussed at regular team meetings.

Lessons learnt from FOLIO course to date

Workload

The rapid pace of development and delivery of the FOLIO courses requires the Course Team to learn quickly. Early on, the Team realized the need to moderate expectations regarding content and thus avoid overloading participants with tasks or exercises. Our course philosophy now aims to achieve the main course objectives and yet ensure participants view each FOLIO course as a pleasurable experience – in fact, no different from a face-to-face course. Ironically, advertising FOLIO courses using the analogy of attendance at a one-day face-to-face workshop has proved problematic. Many students commented on the large amount of time required for completion of the course, borne out by evidence from their portfolios. When one group logged how long they spent on each portfolio task this revealed a wide range of responses, leading the team to conclude that the level of activity and interaction is more analogous to a two or three day face-to-face event. After all, face-to-face courses incorporate lengthy periods of ‘down time’ whereas e-learning courses are more sustained. The team now considers carefully the number and complexity of the tasks and provides days with no specific new tasks to legitimize ‘within course catch up’. In the future, the team hopes to indicate how long to spend on each task, tempered by recognition that different learning styles mean that students progress through exercises at different rates.

Assessment

Portfolios are assessed using a criteria-based mark sheet covering completeness, buddy interaction, participation, creativity, use of resources, critical analysis, application and presentation. Originally portfolios were graded at three levels: fail, honours pass or distinction, based on a holistic assessment of each portfolio. While allowing relatively objective and internally consistent decisions, the wide band around award of an ‘honours pass’ required introduction of an additional grade of ‘standard pass’.

One criterion for assessing portfolios is evidence of interaction with fellow participants (process), but portfolios are better at handling outcomes. A high quality exercise may not necessarily reflect extensive interaction between buddies. Although some buddy pairs do include copies of e-mails, to show how they reached a collaborative answer, future portfolio requirements may need to specifically demonstrate collaboration. Some portfolio sections show lower rates of completion, specifically the quiz, which required both online and portfolio submission. Having anonymously submitted answers to the online quiz neither students nor the course team were able to retrieve their answers for the portfolio. Students now type their answers into the portfolio before submitting their JISC on-line form. Some tasks, such as voting, have not proved educationally useful so will be used more judiciously.

Buddy issues

Problems of buddy pairs, where one buddy withdraws, leaving an 'orphan', are typically addressed by course facilitators acting as surrogate buddies and providing 'crib' sheets to complete collaborative tasks, or using 'buddy groups' of five to seven students, which can survive the loss of one to two members. As one student remarks:

The buddy relationship is a complex one and...potentially quite demanding. We would have benefited from slightly longer gaps between the early tasks around the stakeholder analysis. At one point we were 2 weeks behind, and it grew more and more difficult to follow the plot.

While some participants see buddies as a valuable feature for social interaction others view them as an unwelcome encumbrance to self-directed learning. This is a reminder, if needed, that e-learning, while new to most, is not necessarily a preferred learning style for many practitioners. Indeed it is unclear whether the primary role of the FOLIO course is to find new ways to reach existing audiences or to extend CPD to traditionally poorly served audiences.

Applicability

FOLIO case study material, although current, is not always relevant to students outside the English healthcare system. Currently this only applies for those working in Scotland, Wales and Northern Ireland. However, while briefings and other educational materials remain generic, generalisability may be an issue in extending delivery beyond the UK healthcare system. One Scottish participant expressed it thus:

It would be useful in future to make reference to the fact that in Scotland the NHS is set up differently....A scenario which drew on commonalities [sic] across the United Kingdom would be welcome.

Technology

The Team uses tried and tested technology (a facilitated e-mail list with links to web-pages) with few technical problems. Some technical difficulties were experienced when exploiting the added functionality of JISC lists to provide a quiz and a voting function, with timed release of exercises and answers. Some students had to be mailed Word versions of these documents. Without knowing software configurations it is not possible to explain why some were unable to access these JISC-functions. Course providers should keep their expectations modest when anticipating the technology available to students. For these and related reasons the FOLIO Programme continues to use a low specification approach to deliver materials. Most technical problems are handled by the Course Team but specifying software applications in advance may ensure that students identify appropriately equipped machines to access each course.

Flexibility

FOLIO courses attempt to be flexible to support the e-librarian who is learning alongside their day-to-day work. Participants not only have an automatic two-week catch up period following formal teaching, but when faced with extenuating circumstances (such as work commitments or absence from the course due to illness), can also request a four week extension. Similarly, the course team works creatively with course participants to accommodate planned and unplanned absences.

The FOLIO team has learnt that despite trying to be as accommodating as possible, it must be ever more flexible in acknowledging participants' preferences and circumstances. This extends beyond course delivery and communication to evaluation. Opportunities for feedback, to identify strengths to build on and weaknesses to resolve, must be as learner-centric as circumstances allow. The FOLIO team hopes to engage ever more vigorously with learners in shaping courses that deliver a common core of content and yet acknowledge the differing needs of its participants.

Discussion

The FOLIO Programme provides a unique testing ground within which to explore the potential of e-learning as a mechanism for delivering CPD to e-librarians in a workplace setting. A major selling point is that the Team can introduce experimental features into a new course almost immediately, responding to feedback from recent courses. Rapid responses to a curriculum group representing commissioners, users and professional associations each semester (i.e. three courses) mean that priorities can be managed almost in 'real-time'.

At the same time the course team clearly has much to explore within this innovative method of delivery. When planning and designing a course, the team still tends to start from the analogy of a face-to-face workshop rather than exploiting the more revolutionary potential offered by e-learning itself. The team plans to explore moving away from a set eight-week course schedule to the delivery of 'byte-sized chunks' that allow flexible, tailored individual learning. This would allow a programme of thirty to forty weekly 'learning opportunities' to be offered over a year with librarians choosing a 'package' to match their individual training needs. Such truly flexible delivery is already presaged by such features as portfolio-based assessment and individual course 'building blocks' such as briefings and guest lectures.

Other trends to be accommodated within the FOLIO Programme include blended learning and action learning. Blended learning, that is mixed delivery of face-to-face and e-learning, was always intended to feature under the current FOLIO programme. Ironically it is not the e-learning component that has been difficult to accommodate within a blended format. FOLIO courses are planned strategically and tailored to specific identified needs. In contrast, face-to-face courses to NHS librarians are currently delivered by many training providers, according to diverse training needs and in a manner that is difficult to co-ordinate. Moving towards completely integrated training provision, facilitated under the aegis of a National Library for Health, offers better prospects for 'joined-up' training.

Similarly, current delivery follows a 'push' model, with the course team determining the exact content and methods of delivery within topic areas selected by a curriculum group. Group communication and support processes pioneered by the FOLIO Programme offer the prospect of more learner-centric learning. Members of the FOLIO team have already experimented with face-to-face action learning and are keen to extend this to e-learning.¹⁴ Group problem-solving and an interactive agenda determined by participants would make the most of buddy groups and mentors. By bringing together virtual with face-to-face training, learner-driven with course team-led approaches and 'byte-sized' with module-based learning FOLIO would truly become a 'programme' in the fullest sense.

Conclusion

The title of this paper is in no way intended to sound complacent. The CPD needs of the e-librarian are diffuse, diverse, and continually changing. No CPD programme, regardless of its apparent success, can claim to meet the needs of even one e-librarian let alone the wider e-librarian community. 'Continuing' within CPD refers not only to the personal development of the individual and the shifting nature of the environment and technologies but also to the array of different and changing responses required by those who deliver training.

Nevertheless, the model pioneered by the FOLIO Programme bears many of the hallmarks of a response that can aspire to stay close to the demanding requirements of the e-librarian working against a backdrop of health services. By being flexible, responsive and ever-changing, and by delivering training in an anytime, anyplace environment, models such as those used by the FOLIO Programme can at least 'engage' the needs of the e-librarian, if not 'satisfy' them.

References

- ¹ Burns, F. *Information for Health: An Information Strategy for the Modern NHS 1998-2005, A National Strategy for Local Implementation*. Wetherby: Department of Health, 1998.
- ² Turner, A., Fraser, V., Muir Gray, J.A. & Toth, B. A first class knowledge service: developing the National electronic Library for Health. *Health Information and Libraries Journal* 2002, 19 (3), 133-145.
- ³ Department of Health. *Making Information Count: A Human Resources Strategy for Health Informatics Professionals*. London: Department of Health, 2002.
- ⁴ Pearson, A. & Urquhart, C. Health informatics education – working across the professional boundaries. *Library Review* 2002, 51 (3/4), 200-210.
- ⁵ Maynard, S. *Survey of NHS Libraries 2000-01*. Loughborough, Library & Information Statistics Unit, 2002.
- ⁶ Department of Health. *Working Together Learning Together: A Framework for Lifelong Learning in the NHS*. London: The Stationary Office, 2001.
- ⁷ Maynard, S., Kinnell, M., White, S. & Lianghzi, Y. (2001) *Training Needs Census of NHS Library Staff*. Loughborough, Library & Information Statistics Unit. URL <<http://www.londonlinks.ac.uk/rlg/publications.htm>>
- ⁸ Fraser, V. Continuing professional development in the NHS – what is to be done? *Health Libraries Review* 1999, 16 (4), 268-270.
- ⁹ Toth, B., Muir Gray, J.A., Fraser, V. & Ward, R. National electronic Library for Health: progress and prospects *Health Libraries Review* 2000, 17 (1), 46-50.
- ¹⁰ Scholes, J., Webb, C., Gray, M., Endacott, R., Miller, C., Jasper, M. & McMullan, M. Making portfolios work in practice. *Journal of Advanced Nursing* 2004, 46 (6), 595-603.
- ¹¹ Moshinskie, J. (2003) *How to Keep e-learners from e-scaping. e-LITE Think Tank- White Paper #1*. Texas: Baylor University. URL <http://business.baylor.edu/james_moshinskie/>
- ¹² Garrison, R., Anderson, T., & Archer, W. Critical inquiry in text-based environment: computer conferencing in higher education. *The Internet and Higher Education* 2000, 2 (2), 87-105.
- ¹³ Anderson, T. Teaching in an online learning context. In: Anderson, T. & Elloumi, A. (eds.) *Theory and Practice of Online Learning*. Athabasca: Athabasca University, 2004. URL <http://cde.athabasca.ca/online_book/contents.html>
- ¹⁴ Booth, A., Sutton, A. & Falzon, L. Working together: supporting projects through action learning. *Health Information and Libraries Journal*, 2003, 20 (4), 225-231.

AN ONLINE COURSE FOR RESEARCH LIBRARY ASSISTANTS: DESIGN, IMPLEMENTATION ISSUES, AND OUTCOMES

**Dr Jana Varlejs and Dr Marilyn Wilt
with Morit Shavelsky**

Rutgers, The State University of New Jersey, U.S.A.
varlejs@scils.rutgers.edu
mrwilt@rci.rutgers.edu

Abstract

While an increasing number of degree and professional development courses for librarians has become available online, training and continuing education for library support staff has remained largely a local, on-the-job effort. Typically, library assistants are taught the specific job for which they are hired, and do not receive the kind of broad-based orientation to their library's mission, policies, and procedures that would help them to place their work in a broader context. In order to address this situation, a pilot project was conducted in three libraries to develop and test an online course for academic and research library assistants that could be offered regularly for open enrollment. The paper is in two parts: (1) from the point of view of the project directors, how the pilot was designed, implemented, and evaluated; and (2) from the point of view of a staff development officer of one of the participating libraries, how the project affected the assistants who were selected to take the course. Lessons learned that will influence the course revision conclude the paper.

Introduction

In order to develop and test an on-the-job, online training program for academic and research library paraprofessionals, a grant was obtained from the United States (US) Institute of Museum and Library Services (IMLS) in 2002. The project participants were:

Rutgers University School of Communication, Information and Library Studies
New York Public Library - The Research Libraries
Rutgers University Libraries
Montclair State University Library
The Association of Research Libraries

This paper describes the pilot program, with particular emphasis on the evaluation. The overview of the project is followed by a case study that reports the experience of one of the three participating libraries.

Background

Discussion about continuing education (CE) and professional development in the library/information science (LIS) literature or in association meetings usually centers on 'professional' librarians. Staff who do not hold a degree in LIS are rarely included, at least not explicitly. Yet, most of the people who work in libraries are not degreed librarians. In the US, they outnumber those with the LIS master's almost two to one.¹

In 2003, support staff educational needs received a rare moment in the spotlight, when the third Congress on Professional Education (COPE III) was held under the auspices of the American Library Association. For some time, there had been a general recognition that as library and information technology became increasingly complex and as LIS degree staff numbers decreased, greater responsibilities devolved to support staff.² COPE III confirmed what was generally known, that is, how little CE is available for support staff, at least in the

US. The prevailing training takes place on the job, and tends to be narrowly focused on specific tasks.³

Even before COPE III, the need for a CE program for library assistants brought together the training coordinators for the New York Public Library - The Research Libraries (NYPL) and Rutgers University Libraries (RUL) with the Director of the Professional Development Studies program of the Rutgers School of Communication, Information and Library Studies (SCILS). With Rutgers SCILS and NYPL in the lead, funding was sought from IMLS in order to design and deliver an online course for research library assistants. The rationale for the project is quoted from the grant proposal in order to provide the context for the ensuing discussion.

Most...assistants are hired because they are local residents who meet the basic education requirements – usually either some college credits or associate or bachelor's degree – and they come to their jobs with little or no educational background or experience in libraries. Most library systems do not have the resources to conduct training for these employees beyond general orientations and instruction on the specific tasks of the job at hand.

A summary of the limited educational opportunities for support staff in the US is included in a longer version of this paper at <www.scils.rutgers.edu/~varlejs/olap.html>. Of the types of short-term training that exist, none gives library assistants an overview of the field of library work, or an appreciation how support functions fit into a library's mission and operations.

Project development

The project proceeded in several overlapping phases: design and scripting; recruitment of students; delivery of the course; evaluation. The time frame for the project was two years, with about a year devoted to course development and student recruitment, five months to running the pilot class, and six months to assessment and reporting.

Recruiting students

Originally, the plan called for recruiting fifteen students each from NYPL and Rutgers. In order to overcome objections to releasing the assistants from their duties for the five hours per week that they were expected to spend on the course, the grant included money to pay for temporary replacements. The eligibility criteria that assistants had to meet in order to apply were: (1) more than six months and less than three years of employment in the library, (2) a letter of support from the supervisor, (3) approval by the library's training manager. Since the course was to be delivered online, (4) the students had to possess basic computer skills.

Supervisors were asked to nominate eligible assistants. In the end 14 from NYPL and 10 from Rutgers were selected. To bring the cohort up to the desired number, the Director of the Montclair State University library, an advisor to the project, arranged for the recruitment of another 5 participants. Of the 29 original recruits, 5 dropped out before the course began, and another 2 while the course was in progress. Time pressures and lack of support from the employing library were the reasons given for dropping out. The data on the assistants and their supervisors are summarized in Tables 1 and 2.

Table 1 Characteristics of participating library assistants

Library	Female	Male	Total	DB*	DD*	Average age	Average education	Years in position	Years in library
NYPL	9	5	14	2	1	32	2 yrs college	2.5	5
Rutgers	6	4	10	-	1	35	2 yrs college	1	2
Montclair	3	2	5	3	-	49	2 yrs college	4	4.5
Total	18	11	29	5	2				

*DB: dropped before program began; DD: dropped during the program

Table 2 Characteristics of their supervisors

Library	F	M	Total	Average Age	Have an MLS?		Years in Position	Had any Supervisory training?		Years in library
					Yes	No		Yes	No	
NYPL	6	5	11	46	7	4	7	10	1	22
Rutgers	6	3	9	39	3	6	4	7	2	13
Montclair	2	-	2	55	2	-	5	1	1	7
Total	14	8	22		12	10		18	4	

The data show that the longevity-in-job criteria for eligibility were not met, except in the case of Rutgers assistants. NYPL had suffered a job freeze for a number of years, which was the reason for not having more candidates with fewer years of service. Part II of this paper describes the process of recruiting participants from the perspective of one of the three libraries.

Course development

The project directors began by developing a list of topics that they wanted to include in the course and inviting a group of subject experts to refine the list. Most members of this advisory group became course designers of modules covering their areas of expertise. In order to establish a standard style and tone, the project directors and a consultant edited the results. The entire development process took from the beginning of the grant period in August 2002 until the course went online in September 2003. The software used was eCollege, which was adopted by Rutgers for its online courses. The delivery was asynchronous, but was instructor led. Beginning and ending dates were scheduled for each module, so that the cohort of students navigated the course together. The final course syllabus can be viewed online at the URL previously cited. The content is summarized in Table 3.

Table 3 Course syllabus

Module	Sample Topics
Introduction	Library support staff history, issues , roles
Effectiveness on the job	Time management, communication skills, meetings, managing change, etc.
Library foundations	History, principles and values, missions, networks/consortia
Technology in libraries	Basic computing, troubleshooting, Internet
Collections	Collection development, interlibrary loan/document delivery, Circulation, copyright, preservation
Providing access	Storing/describing information, MARC records
Public services	Behavior at service desks, reference, instruction, exhibits
Digital libraries	Definitions; organizing the acquisition, description, access, and preservation of digital libraries; creating collections
Future of the library	Current trends, legal issues, technology
Finale	Review, feedback

The ten modules were scheduled over a twenty-week period, with each week's work designed to take about five hours to complete. Students were asked to participate in threaded discussions; to carry out assignments such as collecting library policy documents and interviewing supervisors; and to peruse readings. They were urged to keep journals and to take quizzes when finishing modules. At the end of the last module, the designers state what the course was meant to accomplish in terms of student learning:

We hope all of this material has given you new insights into the business of libraries and the organization and operation of your library in particular. We hope we've given you some new ways to think about your role and the role of some of your colleagues in meeting the mission of your library. We hope you've picked up one or two tips that will help you do your job better. We hope we've shown you clearly that focusing on the people who use our services is the key to all of our activities.

In addition, there was the overarching goal of the project: to develop and test an online course that could become a regular, nationally available offering in which academic and research libraries could enroll their recently employed support staff. Therefore, the evaluation of the project was concerned with outcomes for the library assistants (LAs) and their employers on the one hand, and with the viability of the course as it was designed and delivered, on the other. The primary stakeholders in the first case were the three libraries, and in the second the Rutgers SCILS Professional Development Studies program. The Association of Research Libraries was also interested in the pilot as a means of meeting its member libraries' need for this type of program. IMLS, as the agency that provided the funding, was interested in both aspects.

Expected results for students and libraries

IMLS requested that the project directors and evaluation coordinator attend a workshop on outcomes evaluation at the start of the grant period. Consequently, an 'Outcomes Logic Model'⁴ worksheet was prepared that included detailed methodology and specific numerical targets for determining whether the desired results were achieved, as shown in Table 4.

Table 4 Outcomes logic model (excerpts)

Intended Outcomes (<i>Changes in skill, knowledge, attitude, behavior, life condition or status</i>)	Indicators (Measures) (<i>Concrete evidence, occurrence, or characteristic that will show the desired change occurred</i>)
Immediate: LAs will demonstrate knowledge of concepts of the library business, and of the different roles and responsibilities of librarians and other staff	No./% of LAs who score 85 or better on course assessment, and who articulate the differences in the roles and responsibilities of librarians and other staff in online discussion
Intermediate: LAs will report greater job satisfaction and better performance; supervisors will report better performance	No./% of LAs who score at least one level higher on job satisfaction and performance self-assessment scales 3 months after completing the course than they did on the same scales before the course; no./% of supervisors who score at least one level higher on their assessment of the LAs performance.
Long-term: LAs in other libraries will enroll in the course, with similar benefits	The course will have 20 or more registrants twice a year on a continuing basis

[For each outcome, the model calls for specifications such as the following:]

Outcome #1 LAs will demonstrate knowledge of core concepts of the library business

Indicator(s)	Data Source (Where data will be found)	To Whom (Segment of population to which this indicator is applied)	Data Intervals (Points at which information is collected)	Target (the number, percent, variation or other measure of change)
No./% of LAs who will score 85% or better on all online assessments	Quizzes, written assignments, online discussion threads	All LAs who complete course	At the end of course modules	75%

There were four additional immediate and intermediate outcomes proposed:

- LAs will demonstrate knowledge of the differences between the roles and responsibilities of degreed librarians and LAs,
- LAs and their supervisors will report higher job performance,
- LAs will report higher job satisfaction,
- supervisors will report satisfaction with the training program.

In order to collect the data that would constitute the ‘indicators’ of whether the desired outcomes were achieved, a set of instruments were developed. Prior to starting the course, the assistants filled out a self-assessment that dealt with their feelings about their jobs and their ability to do them, and the degree to which they possessed concepts and skills integral to library work. Their supervisors filled out matching surveys, so that it was possible to compare assessments. Three months after the course ended, the same surveys were administered again in order to determine whether or not the expected outcomes were achieved. Mid-course and end-of-course feedback and online journal entries were also collected. As they finished the last module, LAs were asked to write down three things they had learned that they expected to use on the job. These ‘action plans’ were collected and saved by the course evaluators for three months, at which time follow-up meetings were held. The LAs were asked to look at their plans and to write down whether or not they had implemented them. Informal discussions with small groups of LAs allowed evaluators to round out their impression of the effectiveness of the course. In addition, the advisory group that helped to design the course was asked to comment on their experience of the process, and the two instructors were

interviewed in order to gain their views about six weeks into the course and at the end. Course management data were examined for time spent online and quiz scores.

Results in terms of the outcomes logic model

Table 5 shows a comparison of LAs pre- and post-course self-assessments, aggregated by broad categories. The assessments were made using statements such as ‘Participate effectively in meetings’, and ‘Difference between acquisition and collection development’, where the LAs were asked to rate the degree to which they possessed the skill or understood the concept on a scale of 1 to 7.

Table 5 Library assistants’ self-assessments pre- and post-course (n=22)

Category	Change down by 1 whole number or more	Change down by small amount	No change	Change up by small amount	Change up by 1 whole number or more	No. of missing cases	Percent of cases in plus category
Functions, Values of libraries	1	3	3	7	8	0	68%
Roles and functions of library staff	2	7	5	2	4	2	30%
Technology in libraries	0	3	5	4	10	0	64%
Technical processes in libraries	3	2	2	3	12	0	68%
Collections	3	3	0	3	13	0	73%
Communication/personal work practices	4	2	0	12	4	0	73%
All categories	13	20	15	31	51	2	62%

Referring to the first outcome posited in the Outcomes Logic Model, 75% of the LAs who finished the course were expected to demonstrate knowledge of core concepts of the library business, as indicated by quizzes, assignments, and online discussion threads. Because a decision was made not to assign grades, it was not possible to measure this outcome systematically. Students’ self-rating, however, showed that 62% felt that they had made gains in knowledge and skills. The supervisors tended to see a greater gain in skills and knowledge than did the LAs.

The second outcome, knowledge of the differences between the roles and responsibilities of degreed librarians and assistants, was to be measured by having 75% of LAs able to articulate at least three differences. As above, a numeric result could not be ascertained.

The third outcome, better job performance, was determined by comparing pre- and post-course self-assessments and supervisor assessments. Overall, the ratings increased, but

the supervisors' did so more than the assistants'. Agreement of assessments by pairs of LAs and their supervisors was higher than it was initially.

The fourth outcome, higher job satisfaction, was also measured by comparing pre- and post-course self-assessments. In the aggregate, no change occurred.

The fifth outcome, supervisors' satisfaction with the training program, was the only one that achieved the anticipated result, with 60% saying that they would recommend the course to others, and reporting at least three benefits gained from having their assistants participate.

Other results

In addition to data collected for the purpose of determining these five outcomes, a number of other evaluation and feedback mechanisms were built into the project. Half-way through the course, the assistants were asked four open-ended questions. The majority of comments were positive, but when asked what they liked least and what they would change, some LAs said they needed more time, more involvement by and feedback from the instructors, more review and more self-checks (that is, quizzes). A few weeks before the mid-point LA survey, the two instructors were interviewed. They noted that there was not as much discussion and interaction among the students as desirable and attributed that to time pressures. They acknowledged, however, that they might have pushed harder to encourage more exchanges.

As indicated above, three months after finishing the class, the LAs filled out post-course surveys that were essentially identical to the ones they were given at the start. At the same time, small group discussions were held in order to allow the LAs to reflect on the experience. It was also an opportunity for them to see the action plans that they submitted at the end of the course and to comment on the extent to which they implemented their plan and what barriers they encountered. Overall, the LAs followed through on their action plans, and saw few barriers. A wide range of learning was reported, although a considerable number could be categorized as general work skills. LAs mentioned that they were better at time management, participating in meetings, and communicating both with colleagues and the public. Greater understanding of copyright restrictions and ability to troubleshoot technology were among the more technical skills mentioned. In general, they were focused on applying what they had learned to specific aspects of their own jobs, although there also were statements that showed that some had gained a broader appreciation of the functions and operations of research libraries.

In addition to what was learned, the evaluators were also interested in how well the LAs were able to cope with taking a course that was delivered entirely online. In the end-of-course feedback form, the LAs were asked to what extent they had adequate workspace and a consistently functioning computer that they could use for learning at work. The mean score for this question was 5.4 out of 7. Overall, they liked having the course online (a score of 6.2), had some trouble with the technology (5.7), but when asked about enough time at work to take the course, a 4.3 rating indicated that this was the greatest problem.

One library's perspective

Background

Before describing the Rutgers University Libraries (RUL) experience with the online training project, some background information is helpful. Staff development programs at RUL have traditionally been scattered and haphazardly administered. The primary focus has been on teaching technical skills to enable the staff to work well with the existing libraries' technologies. There are no defined core competencies, linked to developmental learning plans

that might guide both employee and supervisor in designing necessary training programs, or on-the-job experiences.

The primary delivery mode for the training programs has been instructor-led, classroom training. RUL is beginning to offer some tutorials online to enable employees to work at their own pace learning Microsoft Office products. In addition, since Rutgers University has three widely dispersed campuses, the libraries have started to offer training programs using videoconferencing to expand 'reach' and potential audiences. Videoconferencing works well for formal presentations, question and answer sessions, and group discussions. RUL has had success delivering Microsoft Office training to all three campuses, using videoconferencing, along with handouts and demonstration disks.

Recruitment process

Moving into total online delivery of course content was a new direction for LAs, supervisors, and administrators. The Libraries' senior management team, the Cabinet, reviewed the program's objectives and felt that participation would be an important learning opportunity for LAs, and also a chance for RUL to assess the effectiveness of online training delivery. The team agreed to coordinate the identification and selection of participants in line with the eligibility criteria (more than six months and less than three years of employment in the library; support from the supervisor; approval by the library's training manager; basic computer skills), while also working with the participants' supervisors to ensure their willingness to support their staff in this twenty-week program.

The Cabinet invited nominations from all three campuses, sharing the descriptive information on the emergent program and the student selection criteria with the supervisors to help them make informed choices of candidates. There were thoughtful discussions and interviews to give both the program organizers and the participants opportunities to gain a better understanding of what they were about to embark upon. Despite these efforts, RUL's contingent failed to reach the desired twenty.

Rutgers participants' reflections

As a member of the project evaluation team, the RUL Training and Learning Coordinator was involved throughout the project and had opportunities to review feedback from the LAs and the course instructors. The evaluation three months after the course was over gave further insight into the transfer of training from the perspectives of both the LAs and their supervisors.

In addition, the RUL Coordinator met with some of the RUL participants about six months later to gather further reflections and insights since their return to their normal everyday routines and practices. In particular, the Coordinator was interested in hearing reactions to the online delivery of the course. When questioned, the RUL LAs had predictably wide-ranging comments about their experiences of this totally online program. Some very much enjoyed taking the class entirely online: they could work at their own pace, they engaged with the readings and activities, and found them to be fruitful and supportive of their work. Others would have enjoyed a more 'blended' course delivery, to give participants an opportunity to put faces to names, to make connections. Individual learning styles and ways of processing information impacted the individual experiences of the program. Some were comfortable working at the computer; others preferred to download readings and use hard copies. Some felt most comfortable working at home rather than in their cubicles, because they were less likely to be distracted or interrupted.

Feelings about tests and about keeping journals colored individual approaches to the program. Participating in a threaded discussion was for some a new experience, and therefore

a potentially challenging one. If English was not the first language, or if one felt somewhat uncomfortable about writing skills, the program held some unique stresses.

The RUL participants agreed that the program afforded a good overview of libraries and working in libraries. They felt much better acquainted even with other units in their own library whose functions they did not formerly understand. They enjoyed having the opportunity to probe the Libraries' organization: learning about its vision, mission, overall organizational structure. In this exploration, they developed a clearer understanding of how the Libraries function, and how their individual jobs fit into that functioning. For some, this expanded understanding created opportunities to take a fresh look at their responsibilities, and how best to apply some of what they had learned.

Suggestions for future online courses

The RUL LAs identified some key qualities that future participants in online programs should be required to have. They will need to be:

- flexible,
- active learners,
- self-disciplined to persevere in the program,
- comfortable with change.

The LAs suggested the possibility of designing some group work into the program to encourage and facilitate dialogue and 'cross-pollination'. They felt that it would have been good to meet face-to-face at the beginning of the program, and to share tips on successfully navigating the program. The RUL Coordinator believes that such a kick-off should include supervisors as well, so that they fully understand what the program involves, and how they can best support the participants that they supervise.

The LAs also suggested creating custom 'tracks' for specific positions in the libraries, other than those generally grouped under the 'library assistant' or 'support staff' label, e.g., administrators; communications officers; development officers; human resources officers. The program's content could serve to better inform the work of each of these staff members. Perhaps in screening potential participants there might be different paths for high school graduates, and those with some college, bachelor's or master's degrees. This last suggestion spoke to some concerns that were raised about individuals' facility in communicating, along with the course modules' reading level and vocabulary.

The Rutgers participants had uneven experiences in their relationships with their supervisors. Some supervisors were supportive, and allowed the LAs adequate time and space, and talked with them about what they were learning. Others seemed not to appreciate or understand the impact of this investment of time and energy on their LA's regular workload. They were not willing or able to facilitate effective transfer of learning. Hence the above suggestion of an opening 'kick-off' event that would include supervisors in order to address some of these concerns.

As the participants talked about their experiences in the program, they each found portions that were strong and meaningful, and others that had little value. The tests were experienced as weak, even pointless, since there were no repercussions and no grades. Questions often seemed too granular, not necessarily encouraging the learner to grasp the critical parts of the module's content. On the plus side, when an individual who was motivated found areas that were unclear or that needed expansion/clarification, there were remedies built into the course that they could pursue.

The threaded discussions seemed to be more appreciated as the participants moved through the program, and they became more comfortable participating in them. The RUL LAs found that the discussions did a good job of amplifying each subject area, prompting a

thorough review. They began to recognize that participating in online discussion is a unique communication skill. One needs to learn how best to join in and share, while recognizing that one can also ‘hide’ online.

Because professional development at RUL has for so long been unplanned and unsystematic, the participants in the program have had little experience of acquiring a new skill or idea and then taking it back to their workplace and applying it in the ‘real world’. While several of the RUL LAs felt that they had gained much in terms of knowledge and understanding, no one could point either to concrete transfer of learning or improved job satisfaction as a result of their new insights.

Impact on RUL planning

RUL expects to offer programs using a variety of media to engage participants on multiple levels. This project has provided RUL with wide-ranging experiences, and a cadre of staff and supervisors who have explored first-hand the value of online delivery of learning. RUL looks forward to building on this background.

Discussion

Evaluation was enriched by collecting both quantitative and qualitative data. Applying the Outcomes Logic Model yielded mixed results. The targets set for desired changes were too high, with one exception. The objective of having 60% of the supervisors willing to recommend the course to others was achieved. The data needed to measure learning was inadequate. In part, this was due to an effort to allay the fear of testing that many of the LAs had, and in part due to the way the ‘self-check’ questions were designed. The course developers wanted the students to use the questions as prompts to think more deeply about each module’s content, rather than as a means of testing comprehension and recall.

Another problem was that participation in threaded discussion and journal keeping was not enforced. An important outcome that was sought was the ability to articulate three differences between the roles and responsibilities of degreed librarians and LAs, yet the question was not posed to the students in a straightforward way that allowed the evaluators to review answers.

There was concern about confidentiality, especially about assuring the LAs that their supervisors were not going to know how they were doing in the course. Judging from comments that LAs made after the course was over, the program directors should have been clearer about expectations and procedures at the outset. LAs would have welcomed more support from their supervisors, and supervisors should have received advice on how to foster transfer of training.

Taking into consideration both the overall evaluation and the informal RUL follow-up, a number of successes and failures can be identified. On the plus side:

- of the 22 who completed the course, 19 logged on for every module,
- the 20 who returned the end-of-course feedback gave an average rating of 5.8 out of 7.0 to the overall quality of the program, and a 6.2 to its online delivery,
- supervisors reported that the LAs performed their jobs better after the course, and had improved their skills and knowledge; LAs also scored generally higher on the post-course survey, although not as much,
- several LAs voiced their intention of pursuing the MLS degree,
- discussions at the three-months post-course meetings and the reviews of action plans indicated that most of LAs were applying at least some things that they had learned,

- ample, useful feedback was obtained from students, supervisors, course developers, and instructors to inform course revision.

On the minus side:

- on average, there was no change in how well LAs thought they did their jobs or how satisfied they were with their work,
- five hours a week was not enough time for most LA's to complete the course,
- there was insufficient feedback from instructors, lack of encouragement from supervisors, dislike of the quizzes,
- interaction among students in discussion threads was disappointing,
- some students complained that the course was too basic.

Conclusions

This pilot project was designed to test the feasibility of an online course for training library assistants in academic and research libraries. It fulfilled this purpose quite well, giving the project directors information about what worked and what needed improvement. Overall, the experience confirmed what is known about factors that influence the quality of online learning.⁵

The experience with integrating the Outcomes Logic Model into the project evaluation has been instructive. The most important lesson was that the evaluators must be more closely involved in the course design in order to ensure that the necessary data can be collected.

Once the course is revised and is offered in the marketplace, it will receive its ultimate, 'real-world' evaluation--libraries either will, or will not be willing to pay for their LAs to take the course and to give them release time to complete it. Of course, the hope is that the commitment to staff development will be there, and that in addition to paying the tuition, that library administrators will give more attention to the selection, preparation, and ongoing support of their online LA students.

Acknowledgments

The Online Library Assistant Training Program was funded by the U.S. Institute of Museums and Library Services; project directors, Karen Novick, Director of Professional Development Studies, Rutgers School of Communication, Information and Library Studies, and Irene Percelli, former Technology Training Officer, New York Public Library Research Libraries; graduate research assistant, Morit Shavelsky.

References

- ¹ American Library Association. (2003). *ALA Library Fact Sheet 2: Number Employed in Libraries*. URL <<http://www.ala.org/ala/alalibrary/libraryfactsheet/alalibraryfactsheet2.htm>>
- ² Owens, L. J. Paraprofessional groups and associations. *Library Trends* 1997, 46 (2), 348-372.
- ³ Mozenter, F., Sanders, B.T. & Bellamy, C. Cross-training public service staff in the electronic age: I have to learn to do what?! *The Journal of Academic Librarianship* 2003, 29 (6), 399-404; Rodgers, T. *The Library Paraprofessional: Notes from the Underground*. Jefferson: McFarland, 1997, 22-23.
- ⁴ *Outcomes Logic Model*. [unpublished. Handout at U.S. Institute of Museum and Library Services workshop] September 2002.
- ⁵ Phipps, R. & Merisotis, J. *Quality on the Line: Benchmarks for Success in Internet-Based Education*. Washington, D.C.: Institute for Higher Education Policy, 2000. URL <<http://www.ihep.com/Pubs/PDF/Quality.pdf>>

EFFECTIVE WORK BASED LEARNING ACROSS PROFESSIONS AND THE IMPACT ON THE ROLES OF LIBRARY AND INFORMATION SERVICES: A CASE STUDY OF U.K. PROBATION WORKERS

Dr Graham Walton

Service Development Manager
Loughborough University Library
Loughborough University
Leicestershire, UK, LE11 3TU
Graham.walton@lboro.ac.uk

Jamie Thompson

Principal Lecturer,
Teaching and Learning,
Northumbria University,
Ellison Place, Newcastle Upon Tyne, NE1 8ST, UK
jamie.thompson@unn.ac.uk

Deborah Trayhurn

Associate Dean,
School of Informatics, Northumbria University,
Ellison Place, Newcastle Upon Tyne, NE1 8ST, U.K.
deborah.trayhurn@unn.ac.uk

Abstract

Work based learning is occurring in many professions and learners will need access to learning material, information and support if they are to be successful in their learning. Supplying these services within the work context will influence the roles that libraries and librarians fulfil. There is a need to develop a deeper understanding of these developments and the impact on the work of learning resource providers.

A case study approach will explore issues around work place learning using the profession of UK probation workers. We pose key questions:

- Are crucial aspects of knowledge (e.g. tacit knowledge, implicit knowledge, ineffable knowledge) being overlooked?
- Does this approach to knowledge requirement and assessment mean that essential characteristics of professional values, critical judgement, self directed learning and motivation are developed or promoted less as part of learning programmes and support?

Challenges for library and information professions are in creating new relationships with workplaces and workplace learners unconstrained or mediated by programme content. The paper draws on research into the processes of professional development and suggests the need for a new set of relationships to address a changing epistemology of workplace learning.

Introduction

There is no doubt that work based learning will increase in its application in many professions. This trend will also impact on many whose work involves supporting the work

based learner, including the library and information professional (LIP). The purpose of this paper is to explore how the increased levels of work based learning will influence the future roles of LIPs. There are two aspects to the context of work-based learning:

- policy context that is characterised by increasing governmental pressure to reframe higher education as a supply side to notions of a knowledge economy,
- research context that is founded in an underpinning theory of situated learning.

There will be brief reviews of the United Kingdom context and the notion of situated learning. Issues around the typologies of knowledge in the workplace will be explored. The case study of UK probation officers follows this discussion and enables debate of emergent themes. An analysis of the case study alongside the wide-ranging related experiences of the authors, raises three key areas for LIPs in supporting and delivering work-based learning. These key themes are elaborated and discussed.

Policy context.

In the UK the National Council for Vocational Qualifications was established in the 1980s. This indicates the steady spread of the codification of knowledge through skill framework developments. A model of skills or competences across employment sectors represents development of knowledge seen as an important economic commodity linked to the efficient management of the workforce. The associated NVQ awards themselves have been supported by the government endorsed Sector Skills Councils. These provide indicators of national skill levels and used as tools for planning up-skilling or workforce development.

At the same time the notion of lifelong learning has gained currency with an underlying theme of continual/lifelong learning for the world of work and the maintenance of employability. Higher Education (HE) has been the last or slowest sector to respond or to be required to respond to this 'new vocationalism'.¹ In the UK there is currently a radical shift in the funding of HE. The government has set high targets for participation in HE (50% of all aged 18-30 by 2010)² but it has also proposed that University funding shortfall be met by a substantial increase in the fees that universities are allowed to charge (supported by a student loan scheme). Work-based learning has become a significant activity in this attempt to reframe HE.³ Institutions are expanding their involvement with businesses and as they respond to the Lambert reports⁴ interest in linking theory and practice will increase.

The debate in UK higher education centres on approaches to the academic accreditation of workplace activity, skills and learning. Most recently focus has been on the added value of university education, to identify the components of gradueness and to assure their delivery. Again these are couched as improved employability expressed in terms of the transferable skills acquired. LIPs have been centrally involved in higher education for many years but there is now a need for re-positioning with the rise of work placed learning.

Research context

This re-positioning can be enhanced if LIPS have a deeper understanding of the theory of work placed learning and where it differs from traditional education and training. In this section some of the key theories will be identified for LIPs. The overarching theory of work-based learning recognises that it is learning inexorably tied up with (and only happening in relation to) the context within which the learning is taking place. This context is the activity, the relationships and the problems being faced alongside the learning with a "social basis for learning... in direct opposition to a traditional view of a separate and – from the practical context – isolated individual as the centre of the learning process".⁵

A number of important contemporary themes emerge from this overarching theory and the associated research and scholarship.

- Reflection: What is reflection? Introspection? Critical reflection? Typologies of reflection include individual reflection e.g. interactional reflection and notions of organizational reflection. These lead to questions as to whether it is possible to measure reflection or assess reflection?
- Assessment: Another major theme is assessment and clear indications here of different requirements of the worlds of HE and work. What needs to be assessed?

Professional practice v academic standards
Competence v academic excellence / level / mark
Able to do v able to write about
Description v critical reflection.

- Learning environments and learning organizations: There is interesting debate about what constitutes a good or ideal learning environment and what the essential characteristics might be for such an environment in the workplace. Furthermore what is the relationship between such environments and notions of a learning organization, or the relationship between learning and productivity?
- Typologies of knowledge: Beyond debates about the relationship between informal and formal learning, discussion seeks to distinguish different types of learning and different types of knowledge. In part this discussion elevates the significance of informal knowledge and learning in the workplace and in part recognises a different order of knowledge, central to effective performance yet hard to measure. This is seen as related to emotional intelligence, the development of personal and professional values and notions of motivation, and called variously tacit knowledge, implicit knowledge or ineffable knowledge.⁶

Exploring the nature of work placed learning using the Probation Service in the UK⁷ as a case study

In this section the Probation Services in the UK will be used to illustrate further elements of work placed learning. The Diploma in Probation Studies (Dip PS) is the qualification required to become a probation officer in the UK. The Dip PS was built around Occupational Standards (i.e. workplace competences) with a prescribed process and content for the award. An important part of each competence indicated in the Occupational Standards for probation officers, is the underpinning knowledge and understanding. This becomes increasingly significant as the level of the standards rise.

The transparency of a candidate's knowledge and understanding contextualizes their action and is a crucial indicator of competence or developmental need. There are a number of ways in which this knowledge and understanding are evidenced:

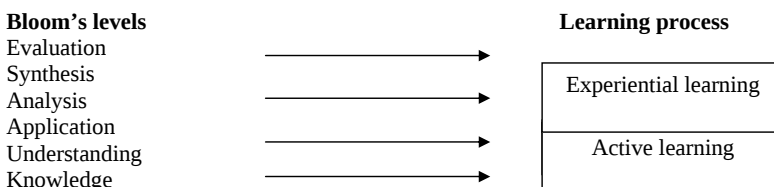
- knowledge and understanding may be implicit in action,
- question and answer sessions after observed practice,
- reflective journals, logs and one-off pieces. e.g. analysis of process, self-evaluation or analysis of critical incidents,
- academic assessments designed to be complementary to workplace practice.

The academic curricula have been built around the main strands of the knowledge and understanding requirements and assessment schedules have been designed to provide evidence directly for units.

Analyzing the knowledge requirements.

It is clear in terms of Bloom's ⁸ taxonomy of cognitive level that the later level in Community Justice is demanding more than simple knowledge and understanding, seeking application of that knowledge and understanding. Further evidence of the higher levels of cognition (analysis, synthesis and evaluation) is also required (see Fig 1 below).

Figure 1 Bloom's levels of learning



The processes of learning and development are different according to these cognitive levels. Candidate and assessor must move through the necessary instruction phase, creating and using opportunities to apply knowledge to practice through active learning and reach a point at which trainees are reflecting, reviewing and planning autonomously as experiential learners. Higher-level cognitive skills are dependent on a firm foundation.

The Diploma in Probation Studies comprises twelve complementary units with a total of 202 underpinning knowledge and understanding items. The items derive mostly from 11 key themes grouped using 168 of the 171 items (98%). Some units draw particularly heavily on knowledge and understanding requiring careful structuring of learning to support the achievement. Trainees need to draw on a range of knowledge to demonstrate competence so programmes that deal with themes one at a time always present problems. Trainees commonly express the perceived need to know everything immediately and often feel frustrated at learning that takes place too late.

The generation of these themes from the underpinning knowledge and understanding requirements represents a central or managerial view of a knowledge base for probation. Occupational Standards contribute to the *management* of learning; providing a standardization process, helping to establish clear boundaries and expectations in relation to particular groups of employees and competences.

The knowledge requirements of the Occupational Standards for Probation are largely non-theoretical as the knowledge described is implicit in observable work behaviour. Further, knowledge is required to achieve a level of competent or good enough practice. The need to know 'why' is largely an unnecessary luxury. However this separation of theory and practice is a flawed paradigm for two reasons. Firstly, theory and practice are much more closely entwined and interchangeable than the paradigm suggests; and secondly, this twin track model overlooks the notion of knowledge in the different but important sense of 'good thinking'.

Taking this model, the *process* of learning becomes the central consideration. As early as the 1950's Reg Revans ⁹ was proposing that prefabricated (or codified) knowledge had limited use in helping people to solve the real practical problems of the workplace. For Revans successful organizations needed to match the pace of change of the external environment with comparable rates of organizational and individual learning. This learning happened most effectively when groups of individuals were given properly structured and supported opportunities to address and solve their own real workplace problems. Revans

proposed a view of knowledge in which workplace knowledge is grounded in and inseparable from experience. His 'action learning' resonates with androgogical theory where the relevance of knowledge and the safety of the learning environment are central to successful learning taking place.

Another important thinker in relation to learning for work is Donald Schon. Schon¹⁰ recognised that in complex social spheres the workplace is characterised by the unexpected. He proposed that practice in such circumstances is a form of 'artistry' that can be developed through use of reflective approaches to practice; reflection on practice (learning from practice) and reflection in practice. Reflecting in practice is the key to professional artistry and demands self-discipline, critical awareness and a commitment to a cycle of learning through practice and reflection. Like Revans, Schon was describing a knowledge process grounded in practice where knowledge was not codified but the very currency of continuing personal and professional growth and development.

From codification to learning

In the Skills Foresight Analysis produced by the Community Justice National Training Organization¹¹ some of the sector training and development needs are expressed in terms of knowledge gaps. Codified knowledge often fails to accommodate notions such as confidence and legitimacy. Meanwhile in the same report managers express concern about lack of innovation in practice. Innovation is a crucial part of any complex business and might be expected to thrive in environments where practitioners are encouraged to learn with and from others in tackling difficult problems in the workplace (c.f. Revans) and/or where reflective techniques are made available and encouraged (c.f. Schon).

Probation officers need to draw on knowledge that is often tacit, implicit or indeed, ineffable. Codified knowledge expressed in occupational standards and academic programmes is incomplete and perhaps inadequate knowledge in need of reframing and decodifying to place the practitioner and/or the learner at the heart. Vocational knowledge must be judged in terms of relevance to the practitioner and understood as being mediated through the learner/practitioner. Unlimited by coda and notions of attaining a required standard in a prescribed timescale, probation knowledge should accommodate notions of learner need, embrace the diversity of learner experience and frame itself in terms of a career-long process.

Feelings: last but not least

Psychology offers us a model to analyse behaviour where action is understood alongside the thoughts and feelings that accompany it. An intrinsic problem in such analysis is in separating out these elements. As a model for understanding vocational development this notion of professional behaviour consisting of thoughts, feelings and actions is a useful tool when evaluating processes designed to prepare individuals for complex jobs. In particular, the inclusion of the emotional as a key element resonates with the lived experiences of doing such jobs. The impact of these feelings on the achievement of successful outcomes is extraordinarily complex. Feelings are invariably present but the extent to which they are transparent varies greatly as does the extent to which the parties are able to recognise, articulate or understand them.

Although there is useful theory to help practitioners understand the place of emotions in behaviour, a vocational notion of emotional intelligence or competence is impossible to describe, inappropriate to prescribe and very difficult to assess. Such a notion of emotional competence is thus absent from the codified knowledge for probation.

Higher Education has much to learn about creating an environment in which students can engage on an emotional level with the content and process of an academic discipline.

However for trainee probation officers it is the learning environment in the workplace that is critical. There must be encouragement to engage with the emotional content of the work. Trainees need to know that there is not just permission but an expectation to review and reflect upon how they feel. This sort of confidence is unlikely to be experienced unless experienced practitioners and supervisors disclose something of their own emotional experience of the work in appropriate settings.

Emerging roles in work placed learning for LIPs

So what then of the significance of the probation experience to Library and Information Professionals? Three main roles for the librarian in supporting work based learners have been extrapolated from the probation worker study: developing content, adapting the workplace for effective learning and establishing organisational learning from the work based learners' experiences. This section will explore how these roles are being developed by examination of the United Kingdom's National Health Service (NHS). The NHS is one of the top 5 biggest employers in Europe. At a strategic level it is proposing a coordinated approach to lifelong learning covering personal and professional development¹² with an education and training budget approaching £2.5 billion. Work based learning has been recognised as the way to deliver lifelong learning for its workforce.¹³ The UK NHS provides a good context to demonstrate how these three roles have emerged for librarians in supporting work-based learning.

Content development.

Despite our reservations about the nature of codified knowledge it is clear that HE needs to become increasingly responsive to the particular knowledge and skills requirements of specific employment sectors. LIPs have an important role to play in working across the divide between academic and vocational codifications of knowledge with librarians taking the lead in raising awareness across HE about the ways in which knowledge is codified and in framing knowledge resources in relation to work-based/vocational as well as traditional subject based HE codifications. Increasingly LIPs need to engage with the tensions between the iteration of knowledge in HE programmes and needs-driven knowledge progression in the workplace, with the complexities of engaging with knowledge for capability / competence as well as knowledge for understanding.

Librarians have long been involved in developing and delivering content for the learner, increasingly this is being done within the electronic context. Providing learning resources electronically has some major advantages for the work-based learner.

1. It gives the learner desktop access at the point of need in work situations (as long as connection to Internet is available)
2. Work patterns which involve changing locations and frequent moving are best met by electronic learning resources
3. When the work force is distributed, central collections of print learning resources will disadvantage some. Providing the work based learner with electronic learning resources provides equity
4. A specific advantage for electronic learning resources access to support work-based learning in the NHS is the power of economies of scale. An extensive and diverse range of learning resources can be purchased economically for NHS employees. In 1998 the Department of Health agreed to begin the National Electronic Library for Health. Its primary mission is to support evidence-based decision-making in healthcare but it also has major role in

delivering learning resources. The NeLH complements existing libraries as it 'concentrates on fast and easy electronic only access to research evidence, clinical guidelines and critically appraised resources' ¹⁴. It has recently been re-badged as the National Library for Health. (<http://www.library.nhs.uk/>).

Two key areas have to be addressed in delivering electronic learning resources to the work-based learners (over and above the quality of the resources): marketing and partnership working. The National Library for Health can provide some important lessons regarding marketing for others involved in supporting work placed learning. They have found that there is a need to "infiltrate daily working lives so that using...resources becomes natural".¹⁵ Multiple communication routes are needed to effectively convey the existence of electronic learning resources to the work-based learner. Partnership working can also enhance the development of learning resources for the workplace and can begin to address the complexities and shortfalls of codified knowledge bases and to develop innovative processes and content. Effective partnership practice should be developed with all the key stakeholder groups. These include learners, trainers, managers, ICT staff and other learning resources providers. Much can be gained from small-scale projects that can then be developed and rolled out as services.

Adaptation of the workplace.

It is clear that HE has been slow to recognise the changing learning environment in the workplace. HE has engaged slowly with the connections between traditionally delivered packages of learning and workplace discourse around employability, competence, capability and lifelong learning. In leading and supporting the development of learning environments the LIP will need to be aware of this discourse and embrace the notion that such environments are not just about flexible access to knowledge resources. Importantly they are also about access to and participation in processes through which problems can be solved and individual learning needs addressed.

Librarians have amassed considerable experience in providing appropriate environments to facilitate effective learning. They are positioned well to adapt the workplace so the work-based learner can be successful in their learning. It has been pointed out ¹⁵ that there is a need to "accommodate different approaches to teaching and learning which recognises that students learn from each other and therefore at times need to work in groups". Many libraries now provide a diverse range of environments offering different learning spaces. For example at Oxford Brookes University four zones are made available: group work/ discussion area, traffic area, quiet study area for individuals where silence cannot be guaranteed and silent area.¹⁶ Work-based learners will develop their own learning style and learning behaviours in the workplace. An argument has been proposed¹⁵ that customer satisfaction is often dependent on their direct/ indirect interactions as they share a service facility's physical environment. In the workplace, the interaction of employees (not all of whom will be learners) will influence the quality of learning for those who are engaged in workplace learning. Library staff have to appreciate what can be done to manage or influence positively the way employees work together to learn. Librarians are ideally equipped to evaluate the workplace and establish how the different learning experiences needed by the workplace learner are best provided. They can also use their experience in working with different clients to identify how best the work-based learner can be supported by the organisation.

Learning through learners' experience

Learners' experiences in the probation example reflect the inadequacy of codified knowledge to meet important aspects of professional learning and development. To succeed at work requires adequacy in terms of knowledge and skills, a clear sense of legitimacy, confidence in a range of support (including emotional support) and the ability to solve problems and innovate. These are important characteristics that need to be delivered in a learning environment.

The third role for librarians in work-place learning which emerges from the probation worker study, is that concerned with establishing organisational learning from the learners' experiences. The concept of the 'learning organisation' emerged in the early 1990's through work by Senge¹⁷ but finding a concise definition is difficult. Garvin¹⁸ proposes that a learning organisation is "an organization skilled at creating, acquiring and transferring knowledge and at modifying its behaviour to reflect new knowledge and insights". Roles for librarians emerge in various facets. Garvin states that a learning organization should demonstrate: problem-solving, experimentation, learning from own experiences/ history, learning from others' experiences/ best practices and transferring knowledge quickly and efficiently throughout the organisation. There is a pressing need to develop a detailed understanding of the workplace learner so various questions can be answered. How does the workplace learner differ from other learners? What support does the work placed learner need? What resources do work-based learners need?

Librarians can take responsibility for such areas as evaluating the learners' experience, benchmarking work place learning in other organisations, trialling services and then facilitating change in the organisation. An example of this role and resulting activities is provided in work exploring how health students learn in the work setting.^{19, 20} This study was undertaken by people from a library background but the investigation focussed on areas not previously seen as being within the 'library' context. It provided evidence and concepts that were used to make the workplace learning experience more effective and efficient.

Conclusion

- If work-based learning is not to be a degraded form of learning then the central role of the LIP in providing a range of support must be recognised.
- Physical access to libraries may not be easy for work-based learners. LIP expertise in ongoing distant access to appropriate material in increasingly important.
- However the LIP role goes beyond this 'technical' expertise. The librarian needs to support and promote organizational development in the workplace and develop close working relations with employers and those delivering learning in the workplace.
- The LIP must evaluate, research and reflect on the learning experience in the workplace and develop a good understanding of the experience of learners and employers in order to deliver ever more supportive and effective services.
- Beyond this there are two particularly challenging questions that begin to emerge. First, to what extent can LIPs draw on a culture in which the learning organization and lifelong learning experience are central in supporting their own work-based learning? Finally, how clear are the boundaries of the librarian role when librarians are increasingly concerned with supporting the processes of learning as a crucial part of delivering the resources for learning?

References

- ¹ Symes C. & McIntyre J. (eds) *Working Knowledge: The New Vocationalism and Higher Education*. Buckingham: SRHE/Open University Press, 2000.
- ² Clarke, C. *The Future of Higher Education*. London DfES, 2003.
- ³ Brown, R. *The Work Related Learning Report*. London: DfES, 2002.
- ⁴ Lambert, R. *Lambert Review of Business-University Collaboration: Final Report*. London: HMSO, 2003.
- ⁵ Svensson, L., Ellstrom, P. & Aberg, C. Integrating formal and informal learning at work. *The Journal of Workplace Learning* 2004, 16 (8), 471-482.
- ⁶ Coffield, F. (ed.) *The Necessity of Informal Learning*. Bristol: Policy, 2000.
- ⁷ Whitehead, P. & Thompson, J. *Knowledge and the Probation Service*. London: Wiley, 2004.
- ⁸ Bloom, B. S. *Taxonomy of Educational Objectives: The Classification of Educational Goals*. London: Longman, 1964.
- ⁹ Revans, R. W. *The ABC of Action Learning*. London: Lemos and Crane, 1998.
- ¹⁰ Schon, D. *Educating the Reflective Practitioner*. San Francisco: Jossey-Bass, 1987.
- ¹¹ Community Justice National Training Organisation. *Skills Foresight Analysis*. London: CJNTO, 2003.
- ¹² Great Britain. Department of Health. *Working Together – Learning Together: A Framework for Lifelong learning in the NHS*. London: HMSO, 2001.
- ¹³ Anon. Emphasis on study for the NHS, *Nursing Standard* 2002, 16 (40), 17.
- ¹⁴ Turner, A. The National Electronic Library for Health. In: Walton, G. & Booth, A. (eds) *Exploiting Knowledge in Health Services*. London, Facet, 2004.
- ¹⁵ Rowley, J.E. Customer compatibility management, or re-visiting the silence rule? *Library Review* 1995, 44 (4), 7-12.
- ¹⁶ Brewerton, A. Noise annoys? *SCONUL Newsletter* 2000, 21, 50-53.
- ¹⁷ Senge, P.M. *The Fifth Discipline*, New York, Doubleday, 1990.
- ¹⁸ Garvin, D.A. Building a learning organisation. *Harvard Business Review* 1993, 71 (4), 78 - 92.
- ¹⁹ Walton, G. Translating recommendations into practice and developing further research: case study of survey into health students' learning resources needs. *Paper presented at Using Research in Practice day, iSHIMR Conference, Sheffield, 17th June 2004*.
- ²⁰ Walton, G., Smith, A., Gannon-Leary, P. & Middleton, A. Supporting learning in practice in the enquiry based learning curriculum: a collaborative approach to ensure nursing pre-registration students have access to learning resources in the placement setting. *Nursing Education in Practice* (forthcoming) 2005.

UNDERSTANDING LIBRARIANS' MOTIVATION TO PARTICIPATE IN PROFESSIONAL DEVELOPMENT ACTIVITIES

Donna Chan

Faculty of Information and Media Studies
University of Western Ontario
London, Ontario
N6A 5B7
dchan39@uwo.ca

Ethel Auster

Faculty of Information Studies
University of Toronto
140 St. George Street
Toronto, Ontario
auster@fis.utoronto.ca

Abstract

It is widely recognized that change in libraries requires staff to pursue professional development and workplace learning opportunities. Libraries can provide a supportive environment for staff, but staff must be motivated to take up the opportunities and learn to adopt new roles, innovate new services and master new technologies. Motivation is the most important factor determining participation in professional development. The results of a study of the participation of reference librarians in large urban public libraries in Ontario, Canada, in 2001 are reported. The study examined the role of factors such as professional commitment, age, barriers to participation, organizational climate, managerial support and motivation on the participation of 553 reference librarians in formal and informal professional development. Motivation emerged as the most important factor determining the time spent in professional development activities, including courses, workshops, conferences, reading the literature, discussions with colleagues and on-the-job training. The intrinsic rewards of professional development activities are perceived as more attainable than extrinsic rewards. Implications of these findings for policies and practices related to professional development include the provision of tangible and achievable rewards for pursuing professional development, and the recognition of the role of managers and supervisors in encouraging participation in professional development activities.

Introduction

In twenty first century libraries, change has become a constant. The introduction of new technologies has enabled the reorganization of work processes and the development of new products and services. In addition, new ways of managing organizations have been introduced. This has led to restructuring, downsizing and the search for flexibility in staffing. The knowledge and skills that workers had acquired through education and on-the-job experience may no longer be relevant for jobs that have been changed by technology or that have been redesigned. Libraries expect staff to take up these challenges and opportunities and learn to adopt new roles, innovate new services and master new technologies by actively pursuing professional development and workplace learning opportunities. This paper examines the crucial role of motivation in the participation of staff in professional development activities. We review the literature on motivation to learn and to participate in

professional development and present results of a study that explores the extent to which professional development of reference librarians was occurring in large public libraries in Ontario, Canada. We examine components of motivation in order to understand the motivational processes of librarians. Our discussion focuses on the meaning of the results for the policies and practices relating to professional development in libraries in the twenty first century.

Review of the literature

Across several disciplines and despite varied conceptualizations, motivation emerges as the single most important determinant of participation in training and professional development activities. This finding is consistent across the industrial psychology and education literatures where motivation has been measured as simply as a desire to learn or as complexly as a mathematical construct based on expectancy theory. In addition, researchers have focused on the predictors of motivation.

Motivation is the process relating to the category of outcomes an individual wants to achieve or to avoid as well as to the specific actions necessary to attain this.¹ In relation to participation in training and development activities, motivation to learn is an employee's desire to learn the content of training and development activities.² In one study, motivation to learn was the only attitudinal variable to have a consistent, positive effect on participation in development activities across three different organizations.² In another study, learning motivation was found to be significantly correlated with participation in five types of development activities.³

Researchers have asked trainees directly about their motivation to participate in the training or development activity being undertaken. Smith and Burgin⁴ asked 731 library professionals and paraprofessionals about their reasons for participating in continuing education programs. They identified four factors, professional competence, patron service, collegiality and personal concerns, as motivators.

Motivation has been conceptualized using expectancy theory.⁵ Expectancy theory predicts that behaviour results from choices individuals make, based on the kinds and levels of rewards they expect to attain and the effort required to obtain the rewards. According to the theory, individuals will be motivated to participate in updating to acquire new knowledge or skills if they:

1. believe that participation in updating activities will result in their being up-to-date and competent (expectancy belief);
2. perceive that being up-to-date will influence the kinds of work-related outcomes such as pay, promotion, praise or feelings of accomplishment they can obtain (instrumentality belief);
3. value the work-related outcomes (valence).

Expectancy theory predicts that the three factors (expectancy beliefs, instrumentality beliefs and valences) combine in a multiplicative fashion to provide motivation to a course of action. Motivation is expected to be greatest when high levels of effort are perceived to be associated with high levels of performance, which in turn lead to valued outcomes, such as higher pay. This formulation has been used in studies of engineers,⁶ administrative staff,⁷ nurses,⁸ information systems professionals⁹ and public servants¹⁰ and their participation in training and development activities. In all these studies, motivation was a significant predictor of participation.

The antecedents of training, including training motivation, have been widely studied. A meta-analysis of training motivation drew on 256 studies to examine the predictors of

motivation and the ways in which motivation influences various outcomes related to participation in training and development. These studies have identified individual characteristics, such as achievement motivation, locus of control, job involvement, organizational commitment, career commitment, self-efficacy, valence and age, as significant predictors of training motivation. Situational characteristics, such as organizational climate, manager support and peer support also play a role in determining training motivation. These characteristics have been linked also to training behaviour (e.g., participation levels) and training outcomes (e.g., knowledge and skill acquisition, reactions to training). The study focused on alternative constructs to model the antecedents of training motivation and outcomes of training. The meta-analysis suggested that motivation mediates the effect certain variables, such as self-efficacy, valence and job involvement, while other variables, such as locus of control, conscientiousness, anxiety, age and climate, exert both direct and indirect effects on motivation, learning outcomes and job performance.¹¹

Methodology

The data used in this paper were collected from reference librarians working in 18 large urban public libraries in Ontario, Canada in 2001. A total of 733 professional librarians with reference responsibilities were sent questionnaires and 553 completed responses were received, for a response rate of 75.4%. The objective of the study was to examine the influence of individual characteristics and organizational factors on the participation of librarians in formal and informal professional development activities.

Professional development activities included on the questionnaire were both formal and informal. Formal activities are scheduled and structured learning activities, such as in-house training courses, continuing education courses at an educational institution or professional association workshops. Informal activities are learning activities that occur opportunistically, without strict timetables, and outside of formal structures.^{12, 13} These include discussions with colleagues, reading professional literature, writing/editing for publication, on-the-job training, attending conferences and self-directed projects.

The other variables in the conceptual framework include motivation; professional commitment (the extent to which an individual identifies with his/her profession); barriers to participation (the personal circumstances that restrict an individual's ability to participate in updating activities); climate (employees' perceptions that management policies and practices influence participation in professional development); managerial support (the perception that managers and supervisors in the organization actively support employees in their efforts to keep up-to-date); and, age. Control variables included full/part-time work status and size of the organization. The operationalization of the measures is described in the appendix.

Multiple regression analysis was used to examine the relationship between participation in professional development activities and the control and independent variables. Each participation measure (formal activities and informal activities) was regressed on the control variables (full/part-time status and size of organization) and the independent variables (motivation, age, subjective age, professional commitment, barriers to participation, updating climate and managerial support). Multiple regression analysis was also used to examine the relationship between motivation and the control and independent variables. Listwise deletion was used to handle missing data. This resulted in varying sample sizes, from 477 to 512, for each of the equations. To examine the components of the motivation measure, t-tests of difference of means and Spearman's rank correlation were used.

Results

There were 553 respondents to the survey, representing 75.4% of the survey population. All respondents included in the analysis have professional qualifications (BLS, MLS or equivalent) and are identified as having some public service responsibilities. The respondents are predominantly female (82.5%), work full-time (77.9%), are members of a professional association (51.9%) and are union members (80.5%). Over half of respondents (58.1%) had been employed as a librarian for 15 years or longer.

Respondents reported an average of 26.4 hours in the previous year in formal updating activities, and an average of 247.7 hours in informal activities. The main type of formal updating activity was in-house courses while the main informal updating activity was conference attendance, followed by discussions with colleagues.

The average motivation score was 54.0, with a standard deviation of 18.7. The motivation scores ranged in value from 2.2 to 112.0. Intrinsic and extrinsic motivation scores were also calculated based on the types of rewards for participating in professional development. Intrinsic rewards were personal satisfaction, development of new knowledge, challenging tasks, preparation for future work and networking with other librarians. Extrinsic rewards were pay, recognition, job security, promotion opportunities and influence over work decisions. The intrinsic motivation score averaged 70.9, with a standard deviation of 25.6; the extrinsic motivation score averaged 37.0, with a standard deviation 17.1. The difference between these two scores was significant ($t=45.88$, $p=.000$).

Table 1 presents the results of the regression of the participation variables on motivation and the independent and control variables. The table shows the standardized regression coefficients for motivation, R^2 for the model, the F-value for the model R^2 , p value, and the sample size. The details of the results for the other independent and the control variables are not shown. For all equations, the model R^2 is significant. For participation in formal activities, $F=6.31$ ($df=8$, 468, $p=0.000$), and for participation in informal activities, $F=9.61$ ($df=8$, 496, $p=0.000$).

Table 1 Regression results for participation variables

	Formal Activities	Informal Activities
	β	β
Motivation	.11	.20
p	0.028	0.000
Overall model		
R^2	0.10	0.13
F-value	6.31	9.61
p	0.000	0.000
N	477	505

Note: Other independent variables included are full/part-time status, size of organization, years in profession, professional commitment, barriers to participation, updating climate, managerial support.

Motivation is a significant predictor of participation in both formal professional development activities ($\beta=.11$, $p=0.028$) and informal activities ($\beta=.20$, $p=0.000$). The effect of motivation is positive. The equations predict that for every unit increase in motivation, participation in formal activities will increase 0.10 hours and participation in informal activities will increase 1.80 hours.

Table 2 presents the results of the regression of motivation and the independent and control variables. The table shows the standardized regression coefficients for the independent

variables, R^2 for the model, the F-value for the model R^2 and the sample size. The model R^2 (0.24) is significant, $F=19.53$, ($df=8$, 503, $p=0.000$)

Table 2 Regression results for motivation

Predictors	β	p
Years in profession	-0.12	0.004
Professional commitment	0.14	0.001
Barriers to participation	0.15	0.000
Climate	0.27	0.000
Managerial support	0.16	0.001
Overall Model		
R^2	0.22	
F-value	20.59	
p	0.000	
N	512	

Note: Control variables are full/part-time status, size of organization

The independent variables are all significant predictors of motivation to participate in professional development activities. Professional commitment ($\beta=.13$, $p=0.001$), barriers to participation ($\beta=.16$, $p=0.000$), climate ($\beta=.26$, $p=0.000$) and managerial support ($\beta=.15$, $p=0.001$) all have a positive effect on motivation. This suggests that the level of motivation is affected by the perceived climate of support for professional development in the library and by the degree of support from the manager. Age, as measured by years in the profession ($\beta=-.11$, $p=0.004$) has a negative effect on motivation.

An examination of the components of the motivation measure, expectancies, instrumentalities and valences, allows us to understand more fully the motivation of librarians to participate in professional development. Table 3 shows descriptive statistics for the expectancy component of the motivation measure. This component reflects the perceived benefits of participation. On a scale from 1 to 5, respondents perceived that they would almost always obtain these outcomes from participation in professional development. Better service to patrons received the highest ranking at 4.30, and higher productivity received the lowest ranking at 3.99.

Table 3 Descriptive statistics for expectancy component of motivation

<i>Benefits of participation in professional development</i>	Mean	S.D.	N
Better service for patrons/clients	4.30	0.72	542
Greater competence in library work	4.27	0.73	543
Enhanced performance as reference librarian	4.24	0.74	543
Higher productivity in professional role	3.99	0.87	539

The valence component reflects the perceived value of the rewards from participating in professional development, and can be characterised as what respondents *want* from the organization for participating in professional development. The instrumentality component reflects the expectations of receiving these same rewards as a result of participating in professional development, and can be characterised as what employees think they *get* from the organization for participating in professional development activities.

Table 4 presents the comparison between the valence ('wants') and instrumentality ('gets') components of motivation. The ranking of the 'wants' list shows that the top three valued rewards were intrinsic (satisfaction, new knowledge and preparation for future work), followed by three extrinsic rewards (job security, influence over work decisions and pay).

However, the ranking of the ‘gets’ list shows that all the intrinsic rewards were thought to be the most likely to be obtained and the extrinsic rewards ranked in the bottom half of the list. The significance of the ‘wants’ and ‘gets’ rankings can be assessed using Spearman’s rank correlation of association (Spearman’s Rho, r_s). Spearman’s rank correlation applies to ranked data; a value of one indicates that the two rankings are identical, and a value near zero indicates no association between the two sets of rankings. A significant correlation would indicate that the level of association between the two rankings is different from zero. In this case, the overall correlation between the two sets of rankings was 0.41, indicating a non-significant level of association between the two groups ($p=0.243$).

The reward which received the highest average ranking in terms of importance was personal satisfaction at 4.53, on a scale of 1 to 5. However, the reward which was rated most likely to be obtained was new professional knowledge and skills at 4.38 on a scale of 1 to 5. Personal satisfaction was the second reward that was most likely to be obtained. Job security ranked fourth in the list of ‘wants’; however it ranked second last in terms of ‘gets’. In other words, job security was quite highly valued by the respondents but it was recognized that it was not likely to be obtained by participation in professional development.

Table 4 Comparison of ‘wants’ and ‘gets’

	“Wants”	“Gets”	N	t-statistic	p
Personal satisfaction	4.53	4.30	544	7.11	0.000
New professional knowledge and skills	4.25	4.38	543	-4.03	0.000
Preparation for future work assignments or projects	4.20	4.02	547	5.29	0.000
Job security	4.10	2.01	546	35.27	0.000
More influence over work decisions	4.00	2.66	546	24.76	0.000
Pay	3.90	1.22	547	66.30	0.000
Recognition from organization	3.87	2.29	545	29.88	0.000
More challenging tasks or projects	3.86	3.10	547	13.78	0.000
Opportunity to network with other librarians	3.74	3.80	546	-1.62	0.105
Opportunities for promotion or better job	3.46	2.88	548	10.16	0.000

Looking at the individual rewards, respondents valued them as important (>3) while their expectations of obtaining these rewards ranged from 4 (likely) to 1 (not at all likely). These gaps between the ‘wants’ and the ‘gets’ are significant for all rewards, except for networking opportunities. In most cases, the value of the reward had a higher rating than the expectation of receiving the reward. For example, pay was rated as ‘important’ (3.90), but the likelihood of obtaining a pay increase through participation in professional development was ranked as not at all likely (1.22; $t=66.30$, $p=.000$). Of the significant differences, only new professional skills scored a higher rating on the ‘gets’ list (4.38) compared to the ‘wants’ list (4.25; $t=-4.03$, $p=.000$).

We now turn to examination of the motivation measures by selected characteristics. Table 5 shows comparisons of the means of the motivation measures by gender, years in the profession and union membership. The level of motivation of women is significantly higher than that for men ($t=2.98$, $p=0.003$); for librarians who have spent less than 15 years in the profession ($t=1.97$, $p=0.049$); and, for librarians who are not union members ($t=-2.91$, $p=.004$). Women and men differ significantly on their level of intrinsic motivation ($t=4.62$, $p=0.000$), but the difference in their level of extrinsic motivation is not significant. Librarians in the early half of their career show higher levels of extrinsic motivation ($t=2.00$, $p=0.045$). Union members show lower levels of extrinsic motivation than non-members ($t=-4.47$, $p=0.000$).

Table 5 Differences in motivation measures by gender, years in profession and union membership

	Motivation	Intrinsic motivation	Extrinsic motivation
<i>Gender</i>			
Women (n=449)	55.07	72.98	37.19
Men (n=92)	48.73	60.79	36.35
t-statistic	2.98	4.62	0.43
p	0.003	0.000	0.669
<i>Years in profession</i>			
Less than 15 years (n=228)	55.77	72.84	38.71
More than or equal to 15 years (n=30)	52.57	69.33	35.73
t-statistic	1.97	1.72	2.00
p	0.049	0.087	0.045
<i>Union Membership</i>			
Member (n=436)	52.85	70.31	35.34
Non-member (n=105)	58.72	73.28	44.14
t-statistic	-2.91	-1.16	-4.47
p	0.004	0.248	0.000

Comparisons of the components of motivation by membership in professional associations are shown in Table 6. There are significant differences in the ratings of ‘wants’ and ‘gets’ according to membership in a professional organization, although the rankings of the sets of rewards are highly correlated. Both members and non-members of professional associations ranked the set of ‘wants’ in a similar manner (Spearman’s Rho, $r_s=0.79$, $p=.006$) and the set of ‘gets’ in the identical order (Spearman’s Rho, $r_s=1.0$).

However, the ratings of the individual rewards on the ‘wants’ list differ significantly for seven of the items. For six of the significant items, members of professional associations value the reward more highly than non-members. These items are personal satisfaction (4.60 for members vs. 4.46 for non-members; $t=2.57$, $p=0.011$); new knowledge (4.34 vs. 4.16; $t=3.31$, $p=0.001$); preparation for future work (4.29 vs. 4.09; $t=3.35$, $p=0.001$); recognition (3.95 vs. 3.77; $t=2.62$, $p=0.009$); challenge (3.93 vs. 3.77; $t=2.19$, $p=0.029$); and networking opportunities (3.91 vs. 3.56; $t=4.73$, $p=0.000$). Non-members of professional associations valued job security (4.18) more highly than members did (4.03; $t=-2.19$, $p=0.037$).

Table 6 Comparison of ‘wants’ and ‘gets’ by membership in a professional association

	Member	N	Non-Member	N	t-statistic	p
<i>Value of rewards (“Wants”)</i>						
Personal satisfaction	4.60	284	4.46	264	2.57	0.011
New professional knowledge and skills	4.34	285	4.16	259	3.31	0.001
Preparation for future work	4.29	285	4.09	263	3.35	0.001
More influence over work decisions	4.05	285	3.94	264	1.61	0.108
Job security	4.03	285	4.18	263	-2.09	0.037
Recognition from organization	3.95	285	3.77	263	2.62	0.009
More challenging tasks or projects	3.93	285	3.77	264	2.19	0.029
Opportunity to network	3.91	285	3.56	264	4.73	0.000
Pay	3.86	285	3.95	264	-1.44	0.151
Promotion or better job	3.53	285	3.37	263	1.85	0.064
<i>Likelihood of rewards (“Gets”)</i>						
New professional knowledge and skills	4.42	283	4.32	263	1.97	0.050
Personal satisfaction	4.35	282	4.23	262	2.03	0.043
Preparation for future work	4.10	284	3.94	262	2.22	0.027
Opportunity to network	4.03	283	3.57	262	5.78	0.000
More challenging tasks or projects	3.22	284	2.97	262	2.64	0.009
Promotion or better job	2.99	285	2.77	263	2.12	0.035
More influence over work decisions	2.82	284	2.50	261	3.34	0.001
Recognition from organization	2.44	283	2.14	262	3.34	0.001
Job security	2.14	283	1.87	263	2.84	0.005
Pay increase	1.29	284	1.15	262	2.87	0.004

Discussion

The results of this study show that reference librarians working in large urban public libraries in Ontario are participating in formal and informal professional development activities. On average, librarians spent 26.4 hours in the previous year in formal updating activities and 247.7 hours in informal activities. The 1994 International Adult Literacy Survey showed that on average, in Canada, full-time employed workers with post-secondary education received 63 hours of training (predominantly formal) in the previous year.¹⁴ Canadian surveys of informal learning have found that professional employees spend about 6 hours per week or 312 hours per year on informal work-related learning.¹² The amount of time spent by reference librarians in this study in informal learning seems to be comparable to the time spent by other professionals and by the general population of Canadians. The librarians in the study, however, report spending fewer hours in formal learning activities than other well educated workers.

Based on an average workday of 8 hours, librarians in the study spent just over three days in the previous year attending formal professional development activities. This may be due to a lack of interest or to a lack of library-related formal professional development opportunities. Formal activities are provided by the employer, educational institutions and professional associations. Many of the library systems in the study were not large enough to be able to provide many formal in-house courses, yet these types of opportunities were the most heavily used of the formal professional development activities. On average, librarians spent about two of their three days attending in-house professional development activities. There seems to be a reliance on the employer to provide formal development opportunities.

The study also sheds light on the motivations of librarians to participate in professional development activities. An organizational climate that facilitates participation and a supportive manager are both positive influences on motivation. Managerial support is an important influence on motivation, possibly through the manager's functions of organizing, directing and co-ordinating work. Supportive managers are those who provide feedback on job performance, assign opportunities to develop and strengthen new skills and take an interest in the career goals of their staff. Respondents in the study mentioned the heavy workload of librarians. For example, one wrote: "There needs to be more encouragement from management to have professionals take the time during the workday to explore new technologies on their own." Clearly, having a supportive manager who enables practice and experimentation results in higher levels of informal updating. Other positive influences include commitment to the profession and, surprisingly, personal barriers to participation, while age had a negative influence on motivation.

The librarians in this study valued all the rewards fairly highly, but their expectations of receiving the rewards were rated as fairly unlikely. According to the expectancy theory of motivation, when individuals perceive a low probability of obtaining a reward that is valued by them they are less likely to be motivated to achieve the outcome. For the majority of the rewards, this gap between the 'wants' and 'gets' existed. There is an opportunity for libraries to influence motivation to participate in professional development by paying attention to the rewards they offer for professional development. One participant wrote, "If there were some sort of recognition in terms of promotion/pay/participation in decision-making, I would be more willing to 'give up' some family time for professional updating activities". Another stated, "There is *no*, absolutely *no* incentive to remain updated or to continue with professional development – no pay incentive, no work incentive, no recognition of *any* kind within the organization. The *only* incentive is my own personal sense of accomplishment and competency".

The study showed that there are differences in motivation scores by gender and there was some indication of inequality of treatment on gender lines. One female noted that in terms of reimbursement of tuition fees, "The inequality is divided on gender lines, leaving women with more of the load to bear as far as tuition fees are concerned." A male librarian commented that "no male librarians have been promoted in 12 years". Perhaps libraries need to re-examine their policies and practices for these effects.

Union membership plays a role in motivation, with librarians who are not unionized showing higher levels of motivation, particularly extrinsic motivation. In unionized workplaces, the reliance on the seniority principle for promotion and pay increases reduces the effectiveness of extrinsic rewards.

Age also plays a motivating role. Age, whether a chronological measure in terms of years or a psycho-social measure in terms of feelings of age, was negatively related to motivation. There were significant differences in the expectations of receiving rewards between older and younger librarians. Perhaps one of the stereotypes of older workers is true in libraries: older workers are not interested in investing the time and effort it takes to learn on their own. Libraries need to consider their human resource practices and how they affect the older workers on their staff. In particular, valued rewards for older workers to update may be somewhat different from that of younger workers. The key is to find out what employees value and to design rewards that truly motivate.

Membership in professional associations is an important factor influencing motivation to participate in professional development. The differences between members and non-members were significant for all rewards in terms of 'wants' (value of the rewards) and in terms of 'gets' (likelihood of obtaining the reward). Some libraries subsidize the cost of

membership for professional staff and/or attendance at professional conferences and workshops but the policies may not be evenly applied. One respondent told us, "Conferences were offered to staff members, but not fully reimbursed financially for attending. This often limited the number of interested staff members, including myself. [It was] never clear that time would be offered in lieu of time spent at off-hours workshops, conferences". Another said, "Conference attendance seems to be generally limited to managers, in terms of staff who are encouraged to go. 'Regular' librarians have to make a special request, justify why they should be 'allowed' to go and may not be reimbursed for fees (only their time, if they are lucky)". Many participants indicated that their library does not reward or recognize them for their membership of professional associations.

There was also a perception held by some librarians that professional associations had nothing to offer them. One librarian wrote, "My biggest concern is that our professional association is not providing activities that meet my needs. The sessions that are offered tend to rehash the problems but offer no solutions. I'm not looking for the questions, but I am looking for some answers or suggestions".

This exploratory study focused on a selected group of librarians in public libraries in a particular geographical region. Future research could expand the scope of coverage. A case study of informal learning in the workplace would be of benefit. This would allow a more in-depth examination of the factors found to be significant in this study together with additional variables that might influence informal learning. Causal modeling of the process of maintaining professional competence can be accomplished through longitudinal studies.

Limitations

Not all possible explanatory variables were included in the study. There are other variables such as self-efficacy, co-worker support and organizational commitment, which have been found to have an influence on motivation in previous studies. The study uses self-reported data that are retrospective in nature. It is known that there is considerable difference between self-reported data on participation in all types of training and development activities and data obtained from administrative records of participation in formal training.^{2,15} There is much measurement error in on-the-job training measures, with organizations reporting up to 25% more training on average than do workers.¹⁵

Conclusion

This study focused on the participation of reference librarians in professional development activities and their motivations to keep up-to-date. Motivation is a significant predictor of participation levels. Librarians were motivated to participate by their expectations of providing better service for their patrons and greater competence in their work. There were significant gaps between the value they place on the rewards for professional development and their perceptions of their ability to obtain the rewards. Membership in a professional association was found to affect the librarians' perceptions of the rewards for updating. Libraries can improve their policies and practices for making professional development opportunities available to their staff, for creating an organizational climate that is supportive of learning, and for recognizing the efforts of their staff to keep up-to-date. In the words of one librarian, "The challenges of the new work environment have reinvigorated my career. The learning curve has become steeper, especially in the last 5-6 years. All in all, though, it's been great fun and has provided immense job satisfaction. My enthusiasm for being a professional librarian has increased immensely".

Appendix. Measures used in the study

Participation in professional development activities

Respondents were asked to estimate the number of hours they had spent in the previous year engaging in the different types of formal professional development activities. For informal activities, they were asked to estimate the number of hours in the previous month they had spent participating in each type of activity. This estimate was multiplied by 12 to yield an estimate of hours spent in the previous year in each activity. The measure of participation in formal and informal activities represents the sum of hours spent in these styles of professional development.

Motivation

The measure of motivation was based on expectancy theory.^{5,16} Motivation is conceived as a multiplicative function of three factors:

1. Expectancy: the belief that participating in professional development activities will lead to better performance, given a certain level of effort,
2. Instrumentality: the expectation of receiving an outcome, given successful performance,
3. Valence: the value of that outcome.

Expectancy was operationalized by asking respondents to estimate how frequently a high level of participation in professional development activities leads to higher productivity, enhanced performance, better service for patrons/clients and greater competence on the job. These were ranked on a scale from 1 (almost never) to 5 (almost always).

Instrumentality was operationalized by asking respondents to rate the likelihood of attaining certain outcomes if they frequently participated in professional development activities. The rating scale ran from 1 (not at all likely) to 5 (extremely likely).

Valence was operationalized by asking respondents to rate the importance of the same outcomes. The rating scale ran from 1 (not at all important) to 5 (extremely important). For the Instrumentality and Valence measures, the same set of 10 outcomes was used. The outcomes consisted of intrinsic and extrinsic rewards. The intrinsic rewards were personal satisfaction, development of new knowledge, challenging tasks, preparation for future work and networking with other librarians. The extrinsic rewards were pay, recognition, job security, promotion opportunities and influence over work decisions.

Age

There were five measures of age. Chronological age, time to retirement, and years in the profession conceptualize age in terms of years. Cleveland and Shore¹⁷ found that age conceptualized in terms of psycho-social age was a useful explanatory measure with respect to work outcomes including participation in development activities. Subjective age refers to how old respondents feel compared to others the same age, while relative age refers to how old respondents feel compared to co-workers.

Barriers to participation

Barriers to participation were measured using a modified version of the Deterrents to Participation scale¹⁸ and the addition of three other indicators of barriers. The scale-based portion of the measure asked respondents to rate on a five-point scale how influential a set of 19 reasons were in contributing to decisions to not participate in updating activities. Examples of items include “The content of the activity was not relevant for my needs” and “The locations of updating activities were often inconvenient.”

Three additional questions were asked. These concerned membership in a professional organization, having a computer at home, and having an Internet connection at home. Negative answers are barriers and were added to the score obtained on the scale portion of the measure. Membership in a professional organization facilitates access to conferences and professional literature, while having a computer with Internet access in the home enables practice with a changing technology.

Professional commitment

Professional commitment was measured using a five item summated rating scale adapted from Blau.¹⁹⁻²¹ Respondents were asked to rate on a five-point scale their response to statements such as “This is the ideal profession for a life work”, and “I like this profession too well to give it up”.

Climate

The measure of climate was adapted from previous research.^{8,9,22} The measure consisted of 22 statements that respondents were asked to rate on a five-point scale about whether they agreed or disagreed. Some examples of statements are: “The library is concerned with the professional growth of its staff” and “The demands of my job leave little time for updating.” The ratings were summed to create the measure.

Managerial support

Managerial support was measured using a nine-item scale.²³ Respondents were asked to rate on a five-point scale their agreement or disagreement with statements describing the support for career development that they receive from their immediate supervisor or manager. Some examples of items include: “My manager gives me helpful feedback about my job performance” and “My manager supports my attempts to acquire additional training or education to further my career.” The summed ratings were used as the measure of managerial support.

Control variables

Control variables of job status and size of the organization were included as these have been identified as consistently affecting participation in training and development.^{7,10,13,24} Job status refers to full-time or part-time employment status.

Acknowledgement

This research was supported by a grant from the Social Sciences and Humanities Research Council of Canada. Ethel Auster, Principal Investigator.

References

- ¹ Thierry, H. Motivation and satisfaction. In: Drenth P.J., Thierry H. & de Wolff C.J., (eds) *Handbook of Work and Organizational Psychology*. 2nd. ed. Hove: Psychology Press, 1998: pp253-289.
- ² Noe, R.A. & Wilk, S.L. Investigation of the factors that influence employees' participation in development activities. *Journal of Applied Psychology* 1993, 78, 291-302.
- ³ Birdi, K., Allan, C. & Warr, P. Correlates and perceived outcomes of four types of employee development activity. *Journal of Applied Psychology* 1997; 82, 845-857.
- ⁴ Smith, D. & Burgin, R. The motivations of professional and paraprofessional librarians for participating in continuing education programs. *Library and Information Science Research* 1991, 13, 405-429.

- ⁵ Vroom, V.H. *Work and Motivation*. New York: Wiley, 1964.
- ⁶ Farr, J.L., Enscoe E.E., Steiner D.D. & Kozlowski S.W.J. *Factors That Influence the Technical Updating of Engineers*. University Park: Pennsylvania State University, 1984.
- ⁷ Mathieu, J.E., Tannenbaum, S.I. & Salas, E. Influences of individual and situational characteristics on measures of training effectiveness. *Academy of Management Journal* 1992, 35, 828-847.
- ⁸ Dorsett, J.G. *Understanding the Relationship Between Age and the Updating Process: The Creation of a Model* [Unpublished Doctoral Dissertation] University of Akron, 1994.
- ⁹ Schambach, T.P. *Maintaining Professional Competence: An Evaluation of Factors Affecting Professional Obsolescence of Information Technology Professionals* [Unpublished Doctoral Dissertation] University of South Florida, 1994.
- ¹⁰ Tharenou, P. The relationship of training motivation to participation in training and development. *Journal of Occupational and Organizational Psychology* 2001, 74: 599-621.
- ¹¹ Colquitt, J.A., LePine, J.A. & Noe, R.A. Toward an integrative theory of training motivation: a meta-analytic path analysis of 20 years of research. *Journal of Applied Psychology* 2000, 85, 678-707.
- ¹² Livingstone, D.W. Exploring the icebergs of adult learning: findings of the first Canadian survey of informal learning practices. *Canadian Journal for the Study of Adult Education* 1999, 13 (2), 49-72.
- ¹³ Noe R.A., Wilk, S.L., Mullen, E.J., & Wanek, J.E. Employee development: issues in construct definition and investigation of antecedents. In: Ford, J.K., Kozlowski, S.W.J., Kraiger, K., Salas E. & Teachout, M.S. (eds) *Improving Training Effectiveness in Work Organizations*. Mahwah, NJ: Lawrence Erlbaum Associates, 1997: pp153-189.
- ¹⁴ Kapsalis, C. *Employee Training: An International Perspective*. Ottawa: Statistics Canada, 1997.
- ¹⁵ Barron, J.M., Berger, M.C. & Black, D.A. How well do we measure training? *Journal of Labor Economics* 1997, 15, 507-528.
- ¹⁶ Lawler, E.E.I. *Pay and Organization Development*. Reading: Addison-Wesley, 1981.
- ¹⁷ Cleveland, J.N., & Shore, L.M. Self- and supervisory perspectives on age and work attitudes and performance. *Journal of Applied Psychology* 1992, 77, 469-484.
- ¹⁸ Scanlan, C.S. & Darkenwald, G.G. Identifying deterrents to participation in continuing education. *Adult Education Quarterly* 1984, 34 (5), 155-166.
- ¹⁹ Blau, G.J. The measurement and prediction of career commitment. *Journal of Occupational Psychology* 1985, 58, 277-288.
- ²⁰ Blau, G.J. Further exploring the meaning and measurement of career commitment. *Journal of Vocational Behavior* 1988, 32, 284-297.
- ²¹ Blau, G.J. Testing the generalizability of a career commitment measure and its impact on employee turnover. *Journal of Vocational Behavior* 1989, 35, 88-103.
- ²² Kozlowski, S.W.J. & Hults, B.M. An exploration of climates for technical updating and performance. *Personnel Psychology* 1987, 40, 539-563.
- ²³ Greenhaus, J.H. Parasuraman, S. & Wormley, W.M. Effects of race on organizational experiences, job performance evaluation and career outcomes. *Academy of Management Journal* 1990, 47, 269-289.
- ²⁴ Tharenou, P. Organisational, job, and personal predictors of employee participation in training and development. *Applied Psychology: An International Review* 1997, 46, 111-134.

HOW DO THEY KNOW WHAT THEY DON'T KNOW? CREATING A DIGITAL PRESERVATION TRAINING PROGRAM

Chris Erickson

Brigham Young University
Digital Preservation Officer
Harold B. Lee Library
Provo, Utah 84602, USA
chris_erickson@byu.edu

Abstract

An effective education and communication program is necessary to implement an organizational digital preservation program. Cooperation and coordination is needed when implementing a digital preservation program because it is more than just one person, and more than a single event. It is a series of managed activities. An educational program is needed to let the designation community know why digital preservation is important, as well as what is happening. The educational program should address the needs of different levels, such as the institution, departments within the institution, and individuals. This paper presents the program at one university, the materials they created, and how they implemented an educational and communication program they put in place to help promote their digital preservation processes.

Introduction

A number of years ago, Ralph, a co-worker, was managing an Australian office for our software company that was headquartered in the United States. Ralph was frustrated at being 'out of touch' with the events happening in the corporate head office. He was certain that important things were happening of which he had no knowledge. When asked what he thought he was missing, he replied, "I don't know! How do I know what I don't know?"

Ralph's statement may at first appear humorous, but there is of course a serious side to it. How does anyone know what they don't know? It is not necessarily a matter of self-education, because not only must a person first be aware of the topic before they can learn about it, but they must be aware of what others are doing that may impact their own work.

In response to Ralph's frustrations, as the International Manager for the company, I started a newsletter to inform the employees about what was happening in the corporate head office. Several times each week, I would visit every company department and report on what they were planning, what they were working on, and any other significant activities. Before long, the remote employees knew more about what was happening throughout the company than those who were in the corporate office. Soon the newsletter was distributed company-wide as other employees realized the value of internal communication. Working in the same location was simply not the same as communicating.

It is apparent that how we approach the task of communicating can directly lead to the success or failure of a project. If, as in the example presented in this paper, our project is to establish a digital preservation program at our institution, then we must establish a program to communicate with and educate others about the program. An effectively communicated education program is a necessary part of implementing an organizational digital preservation program.

Why an education program is needed

Some organizations may only have one person who is responsible for digital preservation, so why is an education program needed? The answer to this question is apparent if we look at the definition of digital preservation. That is, “Digital preservation refers to the series of managed activities necessary to ensure continued access to and preservation of digital materials”.¹ Digital preservation is a series of activities and processes which must all happen, and must often happen in a specified sequence to produce the desired result. These processes will affect just about every part of an organization and they require coordination and cooperation.² Digital preservation involves not just one person and it is not just a one-time event. Rather, it is an ongoing, continuous obligation.³ The program that is established must be sufficiently robust to outlast the implementer.

Digital preservation requires a great amount of effort – no one is capable of doing it alone. An institution may often appoint one person to ‘do’ digital preservation; that person may be a digital preservation officer, a special collections curator, a systems programmer or similar. But the person in charge must broaden the scope of their efforts in order to succeed. The question then, is ‘how’ is this achieved?

How to establish an education program

The ‘how’ in this heading does not refer to the actual preservation of the digital materials, which is a topic discussed at length in other places, but rather, “How do I communicate and coordinate our program throughout our organization?”

With a new program, such as digital preservation, education and communication must go together. Telling others ‘what’ you are doing must be accompanied with the ‘how’, ‘when’ and ‘why’, each of which are essential components of an education program. In this context, to speak of either communication or education is, in effect, speak of both communication *and* education.

To develop an education program to fit your needs you should begin by considering the various levels of your institution. You should identify three levels to address:

1. institutional
2. departmental
3. individual

These levels are listed, not in terms of importance, but in terms of their scope. The institution is the largest and broadest level. It is the sponsoring organization, particularly in terms of funding, and you should begin by looking at this level. The institution will:

- provide the most far reaching level of support,
- gather the interest of others concerned with digital preservation,
- provide the budget to finance the digital preservation programs,
- produce the materials that are to be preserved,
- involve outside institutions in the process.

This type of endeavor should begin with a requirement for the institution to identify, as far as possible, the:

1. digital preservation needs of the organization,
2. departments or sub units within the organization that may be affected,
3. individuals within the organization with whom you should communicate.

While some of the digital preservation needs of the organization may be readily apparent, others will only be discovered as you move forward with the communication and education process.

Institutional level

At the institutional level, you will be dealing with the organization as a whole, with all departments and all individuals. The institutional level goes beyond the needs of the various units and individuals. In our case at Brigham Young University (BYU), this is the University, with the University President, Vice Presidents, and other administrators. The institution includes all departments and all employees. This level sets the overall tone of the organization and is guided by the university mission statement. In looking at this level at BYU we considered the following factors and whether or not they could be included in a digital preservation education program:

- the university web site,
- the monthly university newsletter,
- the annual university meetings and technology fair,
- the university technology workshops.

Departmental level

The departments, while a component of the larger institution, have separate or more specific needs. They are often guided by their own mission statements, which in turn reflect the general university mission statement. The differences must be understood as you prepare a program to meet their preservation needs and interests. As we planned for working with the departments we asked ourselves the following questions:

- which departments have audio or video materials?
- do faculty prepare or use digital materials in their instruction?
- are there copyright or legal concerns with university materials?
- is there a university risk management group?
- do the faculty deposit their materials in a repository?
- who manages the university servers and data repositories?
- what educational or training programs are currently in use by the University Archives and Records Management departments?
- what department meetings are being held?
- who is responsible for each of these areas?

These questions helped to determine the departments that may be interested in an education program, as well as what their needs would be and what mechanisms were already in place. The final question of who is responsible for the areas, led to the next level that we addressed, the individual level.

Individual level

The last, and probably the most important level to consider, is that of the individual. Education and training is most effective when presented on the individual level. In doing this it is necessary to be proactive. Any project that you undertake will be greatly enhanced by the relationships you create and the training you do for others before you begin. At BYU we carefully identified the individuals at each level and in each department that we should first contact. The next step was to visit each of these people. Each person was first contacted by phone, whereby we briefly introduced ourselves, and made an appointment to meet with him or her.

The first visit was an introductory visit, at which we explained who we were, why digital preservation was important, and what we were trying to achieve. This was an excellent opportunity to provide an overview of why effective digital preservation was increasingly vital to the University. In almost every case, the person we had contacted expressed some interest in digital preservation and a willingness to learn more. During this initial meeting we

also learned more about their preservation needs and determined if there were other individuals with whom we should also meet.

Starting the digital preservation education program

As described above, the preparation for the digital preservation education program started by communicating with three level within the University, from the most general to the most specific. The implementation of the program was undertaken in ‘reverse’ order; that is, commencing with the individuals and then progressing to the departmental and institutional levels. The reason for this was to firstly educate those individuals who were most involved in digital preservation and would be able to help implement the preservation program at the University.

Educational materials created

For our education program we decided that we would create several types of materials to educate the employees. These included handouts, web documents, and PowerPoint presentations. Appendices A, B and C provide samples of the educational materials created.

Appendix A shows the main page of the *Digital Preservation* web site. The web site was created so that there was one single place where people could go to find out more about digital preservation at BYU. The web site was created with the input of many people throughout the organization, which further served as part of the educational process. The web site, which is updated frequently, includes sections on the latest digital preservation events, frequently asked questions, preservation materials and tools, web-related resources, and who to contact for additional information.

Appendix B contains a sample page of the weekly digital preservation literature summaries. Each week, the Digital Preservation Officer summarizes several articles, web sites, or books about digital preservation, and posts these summaries to the web page as well as distributing them to subscribers by email. The summaries contain the essence of the readings, but are short enough that they can be read in a few moments. This literature summary helps educate others about what is happening with digital preservation and likely future trends.

Appendix C provides an example of *Preservation Matters*, the digital preservation newsletter that is distributed quarterly throughout the University. This newsletter is designed to catch people’s attention and to increase the awareness of digital preservation at the University. It contains several short articles or diagrams on digital preservation topics.

Concepts presented

The education program was designed to inform and train university employees about the digital preservation program. As not everyone has the same level of training need, we designed a flexible program that could be modified depending on the needs and interests of each groups and individuals. The basic concepts included:

- awareness of the need and individual responsibility for digital preservation,
- the proper creation, storage and handling of digital materials,
- the importance of including relevant metadata for materials.

These are the concepts that we have tried to address with those who produce materials, but do not necessarily need to administer those objects.

The more advanced topics of digital preservation included:

- institutional repositories,
- testing of optical media and migration,
- web archiving,

- understanding the OAIS model and how it relates to our university model.

Above all, we have always tried to promote the concept that we provide a valuable service to staff and to the University.

Individual level

On the individual level, we began re-visiting those whom we had contacted initially. These included supervisors, the University Archivist, the University Records Manager, and others. We had prepared several PowerPoint presentations that we could present on the various concepts that they needed to learn. This type of instruction was done individually or in small groups. As we met with individuals, we tried to build confidence in our digital preservation program, to let them know that there are still many unanswered questions, and that we would be addressing all of the concerns. As one concerned faculty member said following a lengthy discussion, “After talking with you, I realize that there is more than I can get my arms around, but I am glad that you are here to do it”.

Departmental level

The department level became an important method for educating the university employees on digital preservation. With the assistance of some of the individuals in the areas, we were able to present education programs to many of the University’s departments and their administration. This included the Faculty Advisory Council, the Information Technology Department administrators, monthly administrative meetings, and faculty interest groups. To help make the process easier, we created a digital preservation interest group for any who wished to attend.

Institutional level

In some ways, the institutional level was difficult to address effectively, largely due to the size and complexity of the organization. For the most part, the efforts at the institutional level were aimed at providing general information and then for those who expressed an interest, to meet with them individually or with their departments. The main tools used for this institutional level were using the official university news publications, the *Preservation Matters* newsletter should in Appendix C, and the *Digital Preservation* web site in Appendix A. In addition, we were able to establish a University Records Committee, which included Assistant Vice Presidents for Education and Technology, as well as the University legal council, risk management and Copyright Office. This committee became valuable for coordination among departments, for supporting funding initiatives, and for addressing general university directions and policies.

Training a digital preservation officer

The Digital Preservation Officer (DPO) is a key person in implementing a digital preservation program. The DPO creates and directs the preservation program and provides leadership in this regard for the rest of the organization. Thus, it is important that the DPO be properly trained in order to ensure the success of the program.

There is no one right training program, but the following suggestions may be helpful when training a DPO. These suggestions fit into three areas:

1. understanding the basic elements ,
2. keeping current with new ideas and events,
3. individual involvement.

Digital preservation encompasses many topics and areas. It includes hardware, software, archives, records management, project management, and familiarity with many

types of digital media. By understanding the basic elements of digital preservation, by reading and keeping current with new publications and events, and by becoming involved in preservation events and interacting with others in the preservation community, a DPO can become more effective in addressing the ongoing needs of the institution.

Understanding the basic elements of digital preservation

At the heart of digital preservation are several basic elements; the more important are as follows. Digital materials must be actively preserved. If they are not managed properly, these items will become unusable in a relatively short period of time; there is no passive preservation with digital materials as there is with paper. In addition to the preservation needs, digital materials need to be accessible to the users. And it is important that the access is according to the intellectual property rights. The materials must also be managed throughout their useful life. Not everything should be saved, but everything that is saved must be managed. The concept of life cycle management is important for digital materials.

Besides these elements, there are two foundation documents that must be understood. The first is the conceptual model upon which the current digital preservation practices are based. The model is found in a document entitled, Reference Model for an Open Archival Information System (OAIS).⁴ This model was developed to standardize the terms, concepts, and structure of archives that are concerned with long term preservation.

The second document is Trusted Digital Repositories: Attributes and Responsibilities.⁵ The document created by RLG and OCLC establishes the attributes of a digital repository for organizations that wish to provide reliable, long-term access to digital materials. This document builds upon the OAIS model.

There is an additional resource that will help teach the basic elements of digital preservation. Cornell University has developed an excellent tutorial, Moving Theory into Practice: Digital Imaging Tutorial.⁶ This should be the beginning point in any educational program for digital preservation.

Keeping current with new ideas and events

Digital preservation is an emerging field of study; new information is constantly being made available. Therefore it is important that a DPO be constantly reading and understanding what is happening in the field. Here are a few sources information that will be useful:

Listservs

Digital-Preservation [JISC]

<http://www.jiscmail.ac.uk/lists/digital-preservation.html>

Digital Libraries Research mailing list [IFLA]

<http://infoserv.inist.fr/wwsympa.fcgi/subrequest/diglib>

Management & Preservation of Electronic Records [ERECs]

<http://www.lsoft.com/scripts/wl.exe?XH=LISTSERV.ALBANY.EDU>

Preservation/Conservation of documentary Heritage in Europe [EPIC]

<http://listserv.surfnet.nl/scripts/wa.exe?A0=epic-lst>

Reading Materials

CLIR Reports <http://www.clir.org/pubs/reports/index.html>

D-Lib Magazine <http://www.dlib.org/>

Preserving Access to Digital Information [PADI]

<http://www.nla.gov.au/padi/index.html>

RLG DigiNews http://www.rlg.org/en/page.php?Page_ID=12081

In addition to monitoring these websites, each week I post a summary of several articles that pertain to digital preservation. These notes, *This Week's Reading Notes and Source Information* are available to any interested party. They can be read either online or through email at <http://www.lib.byu.edu/departs/dp/readings/current.html>

Individual involvement

One of the best ways to learn about what is currently happening in the digital preservation field is to become involved on an individual basis. There are conferences and workshops in many parts of the world that address preservation issues. Even if you are unable to attend these, the reports are often posted in the Internet for all to read. Many organizations distribute information on their activities and initiatives for the use by organizations facing similar issues. The ECURE conference (<http://www.asu.edu/ecure/>) deals specifically with preservation of and access to electronic records. Two web sites that provide updated information about international events and resources are:

- DPC/PADI What's new in digital preservation
<http://www.dpconline.org/graphics/whatsnew/>
- What's New on PADI? <http://www.nla.gov.au/padi/whatsnew.html>

Conclusion

Digital preservation is important. It is vital to preserving and safeguarding our cultural heritage. In the past, we have had printed books and materials, and the preservation mechanisms that were developed to transfer those items into the future. The methods of how to do that have been well understood. However, digital materials are completely different in format, in longevity, and in requirements for handling and preservation. If librarians are to competently preserve the digital files, we need to make people aware of the need, and teach them how to preserve them.

Our ability to implement digital preservation programs is directly related to how well we are able to educate and communicate with others. This education process, which is key to our future libraries and archives, cannot be left to chance; it must be carefully created and directed, in order to accomplish our preservation goals. If we intend to establish an effective digital preservation program, we must cooperate and coordinate.

This paper has presented an overview of the digital preservation education program established at Brigham Young University. While some of the elements may be unique to BYU, it is also likely that these concepts will be of value to others. Paraphrasing the poet Robert Frost, we still have miles to go, but we are on the road and moving to our goal of an effective digital preservation program.

References

¹ Russell, K. *Digital Preservation and the Cedars Project Experience*. URL

<http://www.rlg.org/en/page.php?Page_ID=254>

² Beagrie, N. (2003). *National Digital Preservation Initiatives: An Overview of Developments in Australia, France, the Netherlands, and the United Kingdom and of Related International Activity*. Council on Library and Information Resources. URL

<<http://www.clir.org/pubs/reports/pub116/contents.html>>

³ Hirtle, P. (2003). *Current State of Play in Digital Preservation*. Cornell University. URL

<<http://www.nationalarchives.gov.uk/preservation/news/conference/media/hirtle.ppt>>

⁴ Consultative Committee for Space Data Systems (2002). *Recommendation for Space Data System Standards. CCSDS 650.0-B-1 Blue Book*. URL

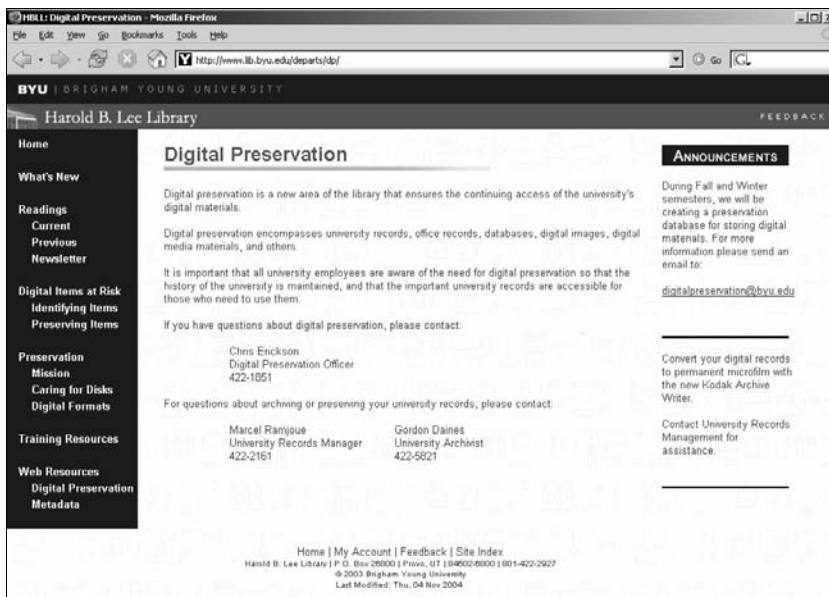
<<http://www.ccsds.org/documents/650x0b1.pdf>>

⁵ Research Libraries Group (2002). *Trusted Digital Repositories: Attributes and Responsibilities*. URL

<<http://www.rlg.org/longterm/repositories.pdf>>

⁶ Cornell University (2003). *Moving Theory into Practice: Digital Imaging Tutorial*. URL
<<http://www.library.cornell.edu/iris/tutorial/dpm/index.html>>

Appendix A Digital Preservation



This digital preservation web site, administered through the Harold B. Lee Library, is an important part of our university digital preservation program. The web site, which is updated regularly, is located at <http://www.lib.byu.edu/departs/dp/>.

Appendix B Digital Preservation Literature Summary

This Week's Reading Notes and Source Information

08 October 2004
Chris Erickson

Implementing Preservation Repositories For Digital Materials: Current Practice And Emerging Trends In The Cultural Heritage Community. A Report by the PREMIS Working Group. OCLC/ RLJ. September 2004
<http://www.oclc.org/research/projects/premis/introreport.pdf>

A report of a survey conducted by the Preservation Metadata: Implementation Strategies (PREMIS) group, whose primary task is to charge is to examine and evaluate alternative strategies for the encoding, storage, and management of preservation metadata within a digital preservation system. (BYU participated in the survey.) The community has very little experience with digital preservation and we don't know if our efforts are adequate. Most repositories are for preservation and access. Most find the operations from their budget. Repositories for libraries and archives have significant differences and missions.

OAI is the main framework used. 87% use more than one preservation strategy. Those surveyed are using 70 different software products. METS and Z39.87 are widely used metadata schemes. The most popular preservation strategies are in order: migration, normalization, restrictions on submission, and migration-on-demand. Emulation is rarely used. 95% stated that they will store multiple versions, the original file and derivatives, with metadata.

An emerging best practice is to store content data objects in a file system or content management system, and store metadata redundantly in an XML or relational database and with the data objects. Metadata in the database are used by the repository system for operations, while metadata stored with the objects make the objects self-identifying for preservation purposes. Some felt that we know so little about long-term preservation that they felt it important to retain multiple versions. Digital preservation still lacks a common vocabulary and common framework. Over 33 metadata sets were being followed. "In general, the survey shows a picture of a community trying to take advantage of prior work but not at the point of developing or setting on dominant standards."

Emerging Best Practices seem to be:

- Metadata stored redundantly in an XML or relational database and with the content data objects
- METS format for structural, descriptive and administrative metadata, Z39.87 for technical metadata for images.
- OAI model as a framework for designing the preservation repository, but retention of the flexibility to add functions and services that go beyond the model.
- Maintenance of multiple versions (originals and at least some normalized or migrated versions) in the repository, and storage of complete metadata for all versions.
- Establishing multiple strategies for digital preservation.
- Distinguish between types of objects in preservation repositories, such as: collections, logical objects, files, and bitstreams, instead of just calling them "objects". Maintain appropriate metadata elements for each.

The Impact of Compliance on Storage. Fred Moore. Computer Technology Review. October 7, 2004.
http://www.wvwp.com/CTR_Current/FredCtri.asp

Recent regulations about data preservation are changing the expected lifetimes of data within the computer industry. The SEC rule 17a-4(c) specifies the type of storage, retention time, lifetimes of duplicates, and data security. The amount of data being stored is increasing, and retention policies are now based on data value and legal need instead of how often it is referenced. This calls for new procedures and a new universal, standard classification scheme for data needs since not all data is equally important. Some vendors are trying to create data classification schemes to give a value factor to specific data. Many question if regulatory compliance is worth the expense. Some industries, such as medical, are expecting to keep data for over 100 years. There are also increasing regulations. We need to understand more about what happens to data during its lifetime, not just the lifecycle. The lifetimes of the data exceeds the lifetime of the devices, so moving data is important. The value of data is increasing and it will change during its life.

Preserving history: Documents are drying up and disappearing. Don Nulken. The Salt Lake Tribune. October, 4, 2004.
<http://www.sltrib.com/business/0,2411665>

Many of the historic documents of the Central Utah Project are deteriorating, and most have no preservation copy. Christine Lindberg at the BYU Law School has been urging that these records be preserved. They will become part of the Western Waters Digital Library which is being created by the Greater Western Library Alliance, which includes the University of Utah and BYU.

These reading notes are available through the web site or an email list. These summaries provide the recent information on what is happening within the digital preservation field.



Preservation Matters

NUMBER 1 2005

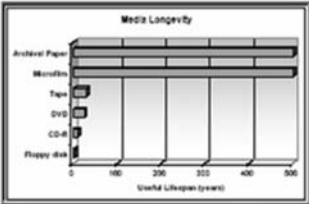
A newsletter about Digital Preservation and related topics at Brigham Young University.

Digital Preservation
is a series of managed activities to make sure that your electronic documents will be available for use. Without active efforts to preserve your documents, they may be unreadable in a few years' time.

Oliver Erickson
Digital Preservation Officer
Harold B. Lee Library
Room 2020
Provo, UT 84602
801-422-5451
digitalpreservation@byu.edu
byu.edu
© 2004 Brigham Young University

Is your digital data Extinct?

Pictures, documents, spreadsheets, and databases. All these useful items that you have created and stored on your computer, may be temporary. Hardware obsolescence, software upgrades, format incompatibility, and fragile media, all which shorten the lifespan of digital materials. The chart below shows the average useful lifespan of current media:



Media Type	Useful Lifespan (years)
Archival Paper	~500
Microfilm	~500
Tape	~100
DVD	~50
CD-R	~20
Floppy disk	~10

What can you do now to preserve your digital materials?

1. Be aware of the need and take an active part. There is no passive preservation.
2. Backup your work regularly & frequently. Include important versions
3. Print out important documents that should be kept permanently
4. Save important items in generic formats, such as text, xml, csv, xsl, pdf, etc.
5. Archive your records before hardware/software changes, and
6. Verify your records after the change

For more information, visit our website <http://www.lib.byu.edu/faq/pdp/>

This is a sample of the quarterly newsletter distributed throughout the university. The intent is to make university employees more aware of the need for digital preservation, and that there is assistance available within the University.

MULTIFACETED CPD: DEVELOPING A PROGRAM TO MEET THE DIVERSE NEEDS OF LIS PROFESSIONALS

Rae-Anne Montague

Assistant Dean for Student Affairs,
Graduate School of Library and Information Science,
University of Illinois at Urbana-Champaign,
501 East Daniel St., Champaign, IL USA
rmontagu@alexia.lis.uiuc.edu

Marianne Steadley

Continuing Professional Development Program Director,
Graduate School of Library and Information Science,
University of Illinois at Urbana-Champaign,
501 East Daniel St., Champaign, IL USA
steadley@alexia.lis.uiuc.edu

Abstract

Library and information science (LIS) professionals face an ongoing need to update and augment their knowledge and skills. In response to this professional reality, the University of Illinois Graduate School of Library and Information Science (GSLIS) has adopted a holistic approach to providing opportunities for continuing professional development (CPD). This paper presents a case of the GSLIS experience in creating and implementing a multifaceted CPD program by examining key factors that have influenced recent interest in and growth of CPD at GSLIS including the alignment of CPD with institutional mission; emerging roles and responsibilities of LIS professionals; increasing demand by alumni; and increased accessibility via Internet. Subscribing to the definition of CPD developed by the American Library Association Second Congress on Professional Education, the GSLIS CPD program encompasses a broad spectrum of activities and methods, so as to accommodate time constraints, funding limitations, learning styles, and evolving roles and responsibilities of LIS professionals. This case provides details of the rationale for, approaches to, and challenges and benefits of developing a holistic model of CPD for LIS within a model of continuous quality improvement.

Introduction

This paper provides an account of recent interest and growth of continuing professional development (CPD) initiatives and activities at the Graduate School of Library and Information Science (GSLIS) at the University of Illinois at Urbana-Champaign (UIUC). By emphasizing a specific context, this case offers an opportunity for readers to consider the topic in depth and understand the complexities inherent within this authentic situation. The first part of the essay provides background information about the setting and the people involved in the case. The following section introduces Continuous Quality Improvement (CQI) and related factors influencing growth of CPD. The third section discusses the use of holistic model of program development and current CPD activities at GSLIS. The final section explores future challenges and possibilities of providing CPD.

CPD setting

The University of Illinois was founded in 1867 under the Land Grant Colleges Act. It is a state-supported institution with a threefold mission of teaching, research, and public service with three campuses: Urbana-Champaign, Chicago, and Springfield. As of fall, 2003, UIUC has a student body of 38,864 of whom 9210 (23%) are graduate students. UIUC is “one of the nation’s great research universities, known for its distinguished faculty, its outstanding resources and the breadth of its academic programs. It is deeply committed to educating its large, diverse student body and to engaging critical societal and scientific issues”.¹

Since the 1890’s UIUC has offered educational programs preparing students to be librarians and, more recently, information professionals in a wide range of settings. Consistent with the UIUC mission, the GSLIS mission is to provide:

- graduate education for leaders in research and practice in the fields of library and information science,
- groundbreaking research to advance preservation of and access to information in both traditional and digital libraries and in the many settings outside of libraries where large amounts of critical information are collected,
- useful service to librarians and other information service providers, as well as to the citizens of Illinois.²

GSLIS is highly ranked among schools of LIS in the United States (U.S.) and was ranked #1 in the most recent U.S. News & World Report³ review. Successes at UIUC, and GSLIS in particular, are closely tied to the vast information resources available through by the University Library, which include more than 10 million monographs and 90,000 periodicals and journals. The Library is organized into forty-two departmental libraries, LIS having its own specialized staff and collection.⁴

GSLIS provides higher and continuing education opportunities at all levels of study, including an Information Technology Minor for UIUC students pursuing Bachelor’s degrees, an American Library Association (ALA) accredited Master of Science (MS) program (available on-campus and online), a post-master Certificate of Advanced Study (CAS; also available on-campus and online), and a Doctor of Philosophy degree. During the fall 2004 semester, 797 individuals enrolled in courses at GSLIS. Teaching and research are overseen by 18 tenured or tenure-track faculty whose research interests cross a wide spectrum in LIS and other related disciplinary areas.⁵ Regular faculty, adjuncts and staff contribute to GSLIS degree and CPD programs by sharing specialized knowledge across a broadly defined LIS curriculum.⁶

CQI and growth of CPD

UIUC, GSLIS, and librarians in general, are perpetually concerned about increasing access to high-quality information and educational opportunities. As many successful institutions, GSLIS operates within a model of CQI. This term refers to, “a philosophy and attitude for analyzing capabilities and processes and improving them repeatedly to achieve the objective of customer [stakeholder] satisfaction”.⁷

CQI is a model adapted from Deming’s Total Quality Management (TQM). “The concept of TQM is applicable to academics”.⁸ Several TQM principles are considered particularly salient in the realm of educational reform, including a “total dedication to continuous improvement, personally and collectively” and the establishment of a culture where “students can best achieve their potential through continuous improvement”.⁹ In a model of CQI, stakeholders are active participants in designing and evaluating programs whereby “students [as well as alumni] can give input regarding what improvements are

needed in the services they receive and in determining how successful the interventions have been".¹⁰

As part of a land-grant institution and a school of LIS, GSLIS espouses a dually reinforced commitment to provide outreach and opportunities for lifelong learning as, "Universities [and schools of LIS, in particular] have an important obligation to people far beyond the borders of our campuses. We are stewards of knowledge that can serve as an important landmark, but only if that knowledge is dispersed and shared freely with everyone who seeks it".¹¹ This premise is echoed by the UIUC Office for Continuing Education's mission to "provide leadership for lifelong learning and distance education".¹²

CQI is integrated into the culture of GSLIS. Since the early years, a commitment to extending educational opportunities has also existed, although the intensity has varied throughout time. The founding director of the School, Katharine Sharp, was a pioneer in extending the reach of the profession and is well known for her outreach efforts including, "summer training classes, library extension services, and other forms of outreach to promote the library and the librarian".¹³ Developing programs intended to serve new audiences, especially those beyond the walls of the institution, require vision and commitment. Specific factors, which have influenced the recent rejuvenation in providing new educational opportunities for CPD at GSLIS are discussed below.

Online education

In 1996 GSLIS saw an opportunity to take a leadership position both on the UIUC campus and among its peers in LIS to pioneer a new approach to education, enabled by the Internet. LEEP, originally an acronym for Library Education Experimental Program, is a GSLIS scheduling option for both the MS (since 1996) and the CAS (since 2002). LEEP is designed as a hybrid model featuring synchronous, asynchronous, independent learning and brief residential components.

The original motivation for developing an online degree option was twofold: to reach qualified students who wanted to pursue LIS education but were place-bound, and to experiment with a new medium for teaching and learning. During the past nine years, LEEP has achieved its original goals and also produced a significant number of unexpected benefits. Those related to CPD are discussed here.

Delving into the new world of online education promoted intensive scrutiny and opened-up new avenues of research and increased interest in program evaluation. Throughout the development of the LEEP program, there has been an interest (and a need, based on stakeholder input) to monitor and assess outcomes of individual courses, success of individual students, satisfaction of faculty, and performance of the program overall. Such evaluation has been integral to gauging success and guiding improvements within a model of CQI. Specific approaches have included new initiatives to track retention of students and placement of alumni; a LEEP retreat in summer 2002 involving faculty, staff, students, and alumni; and formal research carried out by selected GSLIS faculty and doctoral students with interests in computer-supported cooperative work, computer-mediated communication, and online pedagogy. With this much interest and investigation in understanding and monitoring LEEP, many formal works have been created. To facilitate access, a LEEP Bibliography was developed.¹⁴

Intensive research on LEEP has led to a faculty culture with a greater interest in understanding teaching and learning in all settings and exploring new ways to enhance student learning. For example, in terms of age, GSLIS master's students follow national trends.¹⁵ Online students in LEEP tend to be slightly older. This has led to more emphasis being placed on better serving the needs of mature learners, a factor which also may be considered in

designing and delivering CPD. GSLIS faculty and staff are now more likely to draw on the theory of andragogy,¹⁶ in designing syllabi, classroom activities, and CPD programs. With greater awareness of characteristics of adult learners, such as autonomy, self-direction, goal-orientation, relevancy-orientation (i.e., they need to know why they are learning something), interest in practical tasks and problem-solving, faculty and staff are better prepared to meet the needs of new groups of mature students, like those interested in CPD. As noted by Smith, Lastra, and Robins;

Faculty who teach in LEEP become much more self-reflective, not only about their teaching in the online environment, but also about what they do (almost intuitively) in the face-to-face classroom. The extent to which this contributes to increased quality in teaching, in whatever setting, deserves further investigation.¹⁷

LEEP has facilitated opportunities for faculty to rethink their roles as teachers and pedagogy in general. Opportunities to rethink approaches and aims regarding degree programs have led to rethinking about CPD.

GSLIS students have also benefited from having access to new approaches to learning. Alumni are now better able to stay connected and give back to the School from which they earned their degree. For example, a new scholarship endowment fund, started with gifts from current LEEP students and alumni was started in 2003. Graduates now frequently serve as guest speakers during live synchronous sessions in LEEP courses. As well, graduates regularly serve as ambassadors by recruiting new students into GSLIS programs and being willing to serve as points of contact for prospective students, especially those in their geographic area or with similar areas of interest/specialization. Students and graduates can also participate more easily in special events, such as convocation, and now have new opportunities for participation, such as virtual reunions. As the number of LEEP graduates and the time since their graduation increases, the need and demand for providing greater access to CPD, particularly online CPD, opportunities also augment.

Although integrated into GSLIS through curriculum, LEEP was originally conceptualized as a separate scheduling option. In recent years, this distinction has become significantly blurrier. For example, approximately 20% of on-campus students now enrol in one or more online classes via LEEP and over 70% of on-campus classes currently take advantage of online instructional tools (such as electronic bulletin boards). Only a decade ago, these were considered foreign territory. The robustness and utility of the infrastructure originally developed to serve students at a distance now afford opportunities for making connections and promoting participation to all members of GSLIS and the LIS community at large. Some examples of online CPD initiatives utilizing LEEP technology include the CAS, regularly scheduled open lecture sessions, online alumni events, online community credit courses, and the newly formed CPD advisory group.

LEEP, the first online degree program offered by UIUC, now accounts for approximately 50% of GSLIS enrolments and draws students and faculty from throughout the United States as well as some students from abroad. It enhances departmental culture and has greatly broadened the horizon for educational outreach. In the past ten years, the development of online learning at GSLIS has made a significant impact on the intensity of CQI. LEEP has served to leverage research opportunities, enhance technology integration for online and on-campus degree and CPD programs, promote increased interest and discussions about teaching and learning, and served a springboard for designing and developing new initiatives, including a robust CPD program. By embracing the potential of the Internet to facilitate communication and community-development, LEEP has served as a catalyst for improvement and advancement of lifelong learning. The idea of using new technologies to augment service is not new at GSLIS. For example, in the forties, Professor Alice Lohrer's 'flight' extension

program was used to expand remote access to library education.¹⁸ What is unique, however, is the intrinsic versatility and impact of the medium.

Formal alignment of CPD with institutional mission

A statement of commitment to CPD by the School is posted on web site: GSLIS is committed to expanding our focus of continuous learning and development by creating and providing the library and information professional community with a variety of continuing professional development opportunities in many areas of library and information science, services, and operations.¹⁹ A CPD director was hired to plan, design, market, implement and evaluate CPD programs. The creation of this position has enabled GSLIS to start making a more substantial contribution to the profession's continuing education. According to Varlejs, having an individual who is employed to run the CPD program, along with longevity of offerings, are the two best indicators of quality assurance in continuing education.²⁰

Increasing alumni demands

There has been an increasing M.S. enrolments which have lead to increasing numbers of graduates. The alumni have an expectation that if school solicits ongoing donations something should be provided in return. There is a desire to maintain affiliation with school and faculty by other than social activities (as evidenced by surveys conducted in spring 2004).

Emerging roles and responsibilities of LIS professionals

As the American Library Association (ALA) Committee on Accreditation notes, "the [library] profession itself is undergoing profound changes",²¹ making ongoing education a necessity. LIS professionals have an increasing need for technological competencies (e.g. homework help, online reference, support for corporate offices around the globe) to support virtual constituencies. As Jones explains, today's LIS professionals are charged to facilitate online access to information via the Internet:

The integration of the Internet into our daily lives affects no single profession as completely as that of the librarian. For centuries, information has been archived and accessed through a single location, the library. Instantaneous access to online information, direct dissemination of information as it is created, and interaction and creation of information online, all from the home or office-- these are revolutionary and anarchical concepts. Very few among us still deny the pervasiveness of online information access, yet how do we see ourselves leading, and not just reacting, to this revolution?²²

One clear path to enhancing leadership potential and abilities is through CPD. Local librarians in both small rural communities and urban neighborhoods increasingly have the opportunity for involvement in community development efforts and to work with local leaders for community betterment. Libraries can engage in community development efforts in many ways including: serving as community information centers and community training centers; becoming hubs for community Internet access; and providing preservation facilities for community history. Education and training for both library staff and community members are essential components of these focused community information services. In January 2003, GSLIS partnered with the Puerto Rican Cultural Center (PRCC) in Chicago's Humboldt Park area and established a Saturday Street Academy course called 'Paseo Boricua Community Librarianship'.²³ Participants in the course are high school youth completing their degrees. Together they work with GSLIS faculty and students to apply information science, and information and communication technologies, to neighborhood issues (cultural preservation, teen pregnancy, limited educational resources, racism, gentrification, etc.). The project uses

iLabs,²⁴ which provide tools for communication, collaboration, and content management for community members. To share the successes of this project and to encourage similar efforts, a Civic Engagement CPD workshop was held at GSLIS this spring. Libraries are focal points for community information services, and CPD programs incorporating online software such as iLab, along with face-to-face workshops, can provide both the tools and the skills for librarians to meet emerging responsibilities in their communities.

A holistic model of program development

As a state-supported research-intensive institution dedicated to a culture of excellence, UIUC actively promotes and facilitates inquiry related to programs and services. In November 2000, the ALA hosted a Congress on Professional Education to consider issues and problems of continuing professional education for librarians and other professional library staff. In the Final Report of the Steering Committee, several influences on the need for dialogue and action in this area were cited, including:

... the ever-increasing pace of change, the increasing complexity of the information environment, social changes such as diversity and globalization, increased organizational and personal accountability, and a growing awareness of the need for continuous learning.²⁵

Congress participants charged LIS education providers to challenge assumptions, design new opportunities and creative programs, model effective CPD practices and techniques and reach out to those most in need of support and learning opportunities. In order to address this range of issues and progress toward a new era of CPD, a holistic model is necessary. Concerned with promoting human potential, holistic educational models seek to reflect and respond more fully than conventional education to student needs, interests and realities. Given the dynamic nature of CPD, a holistic educational model provides flexibility to adapt to changing environments and move in many directions. At GSLIS this is accomplished by building on our strengths in designing and delivering programs through a variety of methods (e.g. – current awareness publications, lectures and online discussions, workshops, non-degree courses, special events, formal post-master's certificate, networking, etc.). This broad-based approach aims to;

- increase accessibility to varied educational opportunities and learning communities,
- accommodate for time constraints, funding limitations, learning styles, evolving roles and responsibilities and other realities related to LIS professionals,
- engage and educate the LIS professional,
- build a community of lifelong learners who will look to GSLIS for CPD.

This holistic model for CPD is supported by broad experience, extensive resources and a culture of CQI at GSLIS and also incorporates its own formalized system for quality assurance, included ongoing surveys; regular meetings with practitioners in the field and in the state library systems; and incorporation of feedback from program evaluations. Ongoing assessment enables data-driven program design resulting in better programming and increased participation. A new initiative to establish a virtual CPD advisory committee is intended to promote greater ongoing guidance for program development. The committee will use LEEP technology for quarterly synchronous meetings and ongoing discussions will be enabled using the electronic bulletin boards.

CPD development and activities at GSLIS

At GSLIS, CPD program development has been guided by;

- a series of surveys,
- discussions with alumni,
- focus groups with librarians around the state,
- semi-annual meetings with library systems' CPD coordinators.

As shown in Figure 1, there has been a significant increase in the numbers of CE activities and attendees since 2001 when GSLIS hired a CPD director and needs assessments and program planning began.

Figure 1 Number, attendance, etc. of GSLIS non-credit CPD activities

	2001-2002	2003-2004	% Change
Total number of non-credit activities held	2	13	+85%
Total attendance	40	320	+88%
Contact hours	2	76	+97%
Number of programs offering Continuing Education Units (CEU)	0	5	+100%

In addition to increasing the numbers of activities held, over the past three years GSLIS has offered more variety in programming format and content. During 2000-2001, the only CPD events offered were seminars. By 2004, the range of activities included workshops, lectures, short intensive courses, conferences, and institutes. Details of specific programming initiatives are discussed below.

Online discussions

The ALA recognizes personal networking as CPD. Maintaining contact and exchanging ideas with other information professionals is an informal and inexpensive means of CPD. Pedley cites several benefits of networking:

- Helps the information professional keep abreast of developments in the field;
- Provides an opportunity to help others and to be helped;
- Is an effective recruitment tool;
- Is particularly useful for solo librarians with no access to other information professionals on the staff and limited opportunity for formal training.²⁶

Networking in an online environment is challenging, but at GSLIS, this has been facilitated by the LEEP infrastructure. In spring 2004, GSLIS started a program wherein alumni are invited to join online discussions and lectures in several LEEP classes each semester. During these sessions, experienced librarians and students have the opportunity to share ideas and learn from each other. This activity has no cost to either GSLIS or the participating alumni and is accessible to even the most remote individuals.

UI current LIS clips

New technologies offer librarians multiple media for keeping professional knowledge and skills current. At the same time, new technologies offer CPD providers multiple media for delivery. Using a push strategy to deliver new information via an email notification is easy for both the customer and the provider. Current awareness publications fit this model well, and in fall 2002 GSLIS and the UIUC LIS library created *UI Current LIS Clips*,²⁷ an electronic current awareness service covering some of the latest issues in the profession. This free

service offers easy-to-read summaries of the key recent publications in the field for practicing librarians, information professionals, and academics. In the past two years, over 300 subscription requests have been received from around the world. Issues to date have covered topics such as: Continuing Professional Development Program, Recruiting New Professionals to the Field, Web Searching, Electronic Resources, and Marketing Library and Information Services.

Workshops and lectures

Edelson states, “One of the most glorious features of the continuing education world, from the perspective of practitioners, is the mind-boggling variety of things to teach. If you think about it everyone is a potential student”.²⁸ While the GSLIS CPD program is primarily directed towards the needs of the LIS professional, CPD programs are also an opportunity for outreach with the greater community. In CPD workshops and lectures, community and campus members can learn about each other in a casual and friendly manner.

Workshops and lectures presented by GSLIS have covered a wide variety of topics (including youth services, civic engagement, and book collecting), used different delivery modes, and have occurred in various locations around Illinois. Although most activities have been conducted face-to-face, a lecture on Anglo-American Cataloging Rules used the state library’s video-conferencing capabilities for broadcasting. Extending geographic boundaries, workshop facilitators brought ‘Using the Web to Promote Your Library’ to Springfield and ‘Trends in Library Technology Management’ to Chicago.

An interdisciplinary Book Art workshop series (with seven segments) offered in 2004 brought together LIS professionals, other campus units, and community members. Attendance at these workshops was often by repeat participants. Varlejs notes that while it is difficult to measure quality in CPD, a repeat customer implies a satisfied customer.²⁹

Community credit (non-degree) courses

In summer 2002, GSLIS started actively promoting enrollment availability, in both on-campus and online credit courses with excess capacity, to non-degree seeking students for the purpose of continuing professional development. A survey of alumni indicated interest in the option of taking additional courses after graduation, thus in addition to providing CPD to the professional community, this program enhances GSLIS outreach and connectivity with alumni. This Community Credit program coordinated by GSLIS and the Academic Outreach Department of UIUC Office of Continuing Education is open to students who possess at minimum a baccalaureate degree. When the program started, nine courses were available and nineteen students enrolled. During the 2003-2004 academic year, openings in forty-five courses were available and fifty-eight students enrolled. Although there has been a marked increase in enrollment over the years, as these courses are first and foremost for degree seeking students, future numbers will necessarily be limited by excess capacity, which varies by semester.

While a number of both on-campus and LEEP alumni have taken advantage of course availability, the Community Credit option has also been successful as a recruiting tool as it enables potential students access to a limited number of courses before applying for a degree program. A lifelong learning trend identifies that post-baccalaureate certificates often lead to degree programs.³⁰ While the courses offered via the community credit program currently do not result in a formal certificate, they do provide students the opportunity to take graduate level courses and then apply them to a degree. The online option affords participation by a wider and geographically dispersed audience.

Intensive credit/noncredit courses

Edelson observed that continuing education, with its open structure and receptiveness to the market, becomes an excellent location to try new programs and launch innovations.²⁸ During summer 2003, three new one-week courses on topics in special collections librarianship were offered. These included History of the Book, Special Collections in the Sciences, and Fundraising for Special Collections. Originally conceived as non-credit CPD summer institutes, GSLIS student interest was so high that a credit option was offered. That year, the class make-up was a mixture of GSLIS students and anyone interested in these special collections topics. The content and intensive format of these courses was so successful with GSLIS students that during summer 2004 they became part of the curriculum and are now offered for credit only. An unexpected outgrowth of this program in 2004 was the previously mentioned Book Arts workshops.

CAS

According to Varlejs, although LIS online master's degree courses and programs have been increasing, face-to-face is still the prevailing mode of delivery for CPD.³¹ At GSLIS, with growing numbers of courses in the degree program available online via LEEP, options for use of the online material as CPD also increase. Existing material may be modified and modularized such that it can be offered as short online CEU-bearing courses or non-credit CPD.

The most formal and structured CPD program offered by GSLIS is the CAS, a forty semester hour course of study open to those who hold a master's degree in LIS or a related field. The CAS provides experienced information professionals with an articulated and systematic continuing education program to enhance their professional development in LIS. The CAS program enables librarians, information scientists, and others in information management to enroll in a post-master's degree program to refresh and update their skills, gain greater specialization in their professional training, or redirect their careers from one area to another. Building on several years of experience in online education with the graduate degree, in 2002 an online option for the CAS using LEEP technology was approved. A new online technically oriented concentration in digital libraries will admit students in 2005, further increasing the opportunity for online CPD.

Challenges – then and now

Building on a solid educational foundation with increased interest and capacity for outreach under the guidance of a designated coordinator, the CPD program at GSLIS has grown considerably over the past three years. But growth has not been without challenges. Starting a new program, which is outside of the main work GSLIS, entailed finding ways of relating CPD to the mission of the school and conducting internal marketing. With a research-oriented faculty and no CPD budget, identifying resources to plan, design, promote and conduct CPD was, and continues to be, a task requiring creativity. Hence, from the beginning, building a program embracing a holistic approach to make best use of available resources has been fruitful. Linking CPD to outreach and alumni relations has provided the connection to the School's mission and has uncovered a pool of resources for planning, developing, marketing and conducting CPD activities. Alumni have contributed to needs assessment efforts by participating in surveys and focus groups; developing and conducting workshops; and volunteering to be members of a newly established CPD advisory board. Internal marketing of CPD programs to faculty, staff and students has helped position CPD as a school resource not only to external consumers, but also to the GSLIS community. Print flyers, electronic bulletin board announcements, and personal invitations have helped increase

awareness and acceptance of CPD as a School program. With an eye to the future market for CPD, GSLIS encourages students to attend activities by offering reduced rates or other incentives.

The dynamic nature of the LIS field makes it challenging to plan, develop, market and deploy CPD. The roles of libraries and librarians are changing and identifying those roles and the required education and training necessitates ongoing assessment. Because CPD should be able to respond quickly to changes, the transition from isolated programming to a more strategically planned program is needed. Fortunately, the holistic model is also an adaptive model, which accommodates both. In face-to-face training, making use of resources as they come available often leads to one-time programs. On the other hand, online CPD offers continuity and reuse of content. Online CPD is a growth area and one in which GSLIS will continue to increase activities.

The financial return on investment (ROI) for programs other than Community Credit courses and the CAS has been small. The additional tuition dollars brought in as a result of increased enrollment in Community Credit courses and the CAS are considered precisely that – tuition dollars. In regards to the other CPD programs, online discussions, the electronic current awareness service, and most of the lectures and seminars provided to children and youth services librarians are free to the LIS community and do not generate revenue. Workshops and the short intensive courses have produced some revenue, but the amount has been affected by factors such as the one time nature of some of the programs, the location of GSLIS in a relatively small community, and the fees LIS professionals are willing and able to pay.

There have been other measures of success however, which are less tangible but equally important. CPD participants enhance the learning community. Alumni have taken note of the increasing numbers and types of CPD programming as evidenced by positive survey responses and participation in CPD. They have new opportunities to stay connected and contribute to the School, which now provides them formal services. Opportunities to try small-scale innovative programs such as the Special Collections Institutes have resulted in GSLIS being able to offer special collections librarianship courses to students. These courses have not been part of the curriculum in many years. And, finally, by committing support to a dedicated CPD director and expanded programming, GSLIS is contributing to the LIS profession by providing leadership for lifelong learning. As White remarked, one should not expect any thing less from a school “which has consistently remained in the vanguard of educational progress”.³²

References

¹ University of Illinois at Urbana-Champaign *Facts 2004*. URL

<<http://www.uillinois.edu/about/pubs/facts04.pdf>

² *Mission of the Graduate School of Library and Information Science*. URL

<<http://www.lis.uiuc.edu/gslis/school/index.html>>

³ *U. S. News and World Report Library School Rankings*. URL

<http://www.usnews.com/usnews/edu/grad/rankings/lib/brief/lib_brief.php>

⁴ University of Illinois at Urbana Champaign, *Library and Information Science Library*. URL

<<http://www.library.uiuc.edu/lisx/>>

⁵ Graduate School of Library and Information Science *Faculty Profiles*. URL

<<http://www.lis.uiuc.edu/gslis/people/faculty/research.html>>

⁶ Graduate School of Library and Information Science *Course Catalog*. URL

<<http://www.lis.uiuc.edu/gslis/degrees/courses/catalog.html>>

- ⁷ American Society for Quality *Information glossary*. URL <<http://www.asq.org/info/glossary/c.html>>
- ⁸ Mehrotra, D. *Applying Total Quality Management in Academics*. URL <<http://www.isixsigma.com/library/content/c020626a.asp?action=print>>
- ⁹ Bonstingl, J.J. (1992, November). The quality revolution in education. *Educational Leadership* 1992, 50 (3) URL <http://www.ascd.org/publications/ed_lead/199211/bonstingl.html>
- ¹⁰ Penn State Office of Planning and Institutional Assessment *Continuous Quality Improvement* (2003) URL <<http://www.psu.edu/president/pia/cqi/>>
- ¹¹ Reilly, K. *Outreach Scholarship 2003 Plenary Session Address & Welcome*. URL <<http://www.uwex.edu/chancellor/documents/kpr-OSC2003-welcome.pdf>>
- ¹² University of Illinois at Urbana-Champaign, Office of Continuing Education. *Mission*. URL <<http://www.continuinged.uiuc.edu>>
- ¹³ Allen, W.C. & Delzell, R.F. (eds.). *Ideals and Standards: The History of the University of Illinois Graduate School of Library and Information Science, 1893-1993*. Champaign: University of Illinois Press, 1992.
- ¹⁴ Graduate School of Library and Information Science *LEEP Bibliography*. URL <http://www.lis.uiuc.edu/gslis/degrees/leep_bib.html>
- ¹⁵ Association for Library and Information Science Education *Students Enrolled by Age Statistics*. URL <<http://ils.unc.edu/ALISE/2003/Students/Table%20II-8-a.htm>>
- ¹⁶ Knowles, M.S. *The Modern Practice of Adult Education: From Pedagogy to Andragogy*. New York: Cambridge, The Adult Education Co., 1980.
- ¹⁷ Smith, L.C., Lastra, S. & Robins, J. Teaching online: changing models of teaching and learning in LEEP. *Journal of Education for Library and Information Science* 2001, 42 (4), 348-363.
- ¹⁸ Estabrook, L.S. Distance education at the University of Illinois. In: Barron, D. (ed.) *Benchmarks in Distance Education: The LIS Experience*. Westport: Libraries Unlimited, 2003: pp63-73.
- ¹⁹ Graduate School of Library and Information Science *Continuing Professional Development*. URL <<http://www.lis.uiuc.edu/gslis/degrees/cpd.html>>
- ²⁰ Varlejs, J. Quality control and assurance for continuing professional education. In: Ward, P.L. (ed.) *Continuing Professional Education for the Information Society*. Munich: Saur, 2002: pp232-242.
- ²¹ American Library Association Committee on Accreditation. *Outcomes Assessment for Library and Information Studies*. Chicago: ALA, 1995.
- ²² Jones, D. (1996). *Critical Thinking in an Online World: Untangling the Web*. URL <<http://www.library.ucsb.edu/untangle/jones.html>>
- ²³ Paseo Borricua Community Library Project. URL <<http://www.prairienet.org/pbclp/>>
- ²⁴ iLabs. URL <<http://inquiry.uiuc.edu/ilabs>>
- ²⁵ American Library Association Second Congress on Professional Education. *Final Report*. URL <<http://www.ala.org/ala/hrdrbucket/2ndcongressonpro/2ndcongressprofessionaleducationfinal.htm#final>>
- ²⁶ Pedley, P. Plugging into the network: networking as a tool for professional development. *Library Association Record* 2000, 102 (10), 568-569.
- ²⁷ University of Illinois at Urbana-Champaign *Current LIS Clips*. URL <<http://www.lis.uiuc.edu/clips/>>
- ²⁸ Edelson, P.J. Images of continuing education. *Continuing Education Higher Review* 2004, 68, 87-95.

²⁹ Varlejs, J. The ALISE statistics on continuing education: what the numbers don't tell us. *Journal of Education for Library and Information Science* 2004, 45 (3), 251-254.

³⁰ University Continuing Education Association. *Lifelong Learning Trends*. Washington: UCEA, 2004.

³¹ Varlejs, J. Continuing Education tiptoes online: Where are the quality guidelines? *Journal of Education for Library and Information Science* 2003, 44 (3/4), 332-335.

³² White, C. M. *The Origins of the American Library School*. New York: Scarecrow Press, 1961, p. 147.

**DEVELOPMENTS IN POST-MASTERS EDUCATION FOR
PUBLIC LIBRARY ADMINISTRATION IN NORTH AMERICA:
WITH PARTICULAR REFERENCE TO THE PUBLIC LIBRARY
ADMINISTRATORS' CERTIFICATE PROGRAM AT THE
PALMER SCHOOL OF LIBRARY AND INFORMATION
SCIENCE**

Jerry Nichols

Director,

Palmer Institute of Public Library Organization and Management,
Long Island University, C.W. Post Campus,
Palmer School of Library and Information Science,
Long Island University, 720 Northern Blvd., Brookville, New York,
U.S.A. 11548
gerald.nichols@liu.edu

Professor Michael Koenig

Palmer School of Library and Information Science
Long Island University. C.W. Post Campus.
Palmer School of Library and Information Science,
Long Island University, 720 Northern Blvd., Brookville, New York,
U.S.A. 11548
Michael.Koenig@liu.edu

Abstract

This paper describes the development of a movement within American public libraries to provide a mechanism to support formal post-masters degree education for public librarians in the area of management and administration, and examines the critical aspects of one such successful programme. The paper traces the developments within the North American library education community of programs addressing the need for continuing professional development for public librarians to prepare them for administrative and managerial positions. In addition, it provides a case study of the development of a formal five-course post-Masters Certificate in Public Library Administration now hosted at the Palmer School of Library and Information Science, Long Island University, New York. Recognised by the New York State Education Department, this is the first such program in the U.S., and offers a workable prototype for similar efforts. The recent American Library Association – Allied Professional Association discussions regarding the need for quality continuing education in the area of public library administration and management has generated considerable interest throughout the profession yet the overall response to this concern from the library education community has so far been modest.

Introduction – the push for post-Masters education

In 1996 the American Library Association's Public Library Association and Library Administration and Management Association Executive Boards approved 'in concept' the establishment of a Certified Public Library Administrator¹ program. The focus of this effort was to establish a formalized and documented certification process to determine if an individual was qualified in terms of the knowledge and skills particular to the management of

public libraries. The Association of Specialized and Cooperative Library Agencies (ASCLA) soon joined this effort. ALA staff thereafter was directed to thoroughly explore the idea and to encourage widespread discussion throughout ALA of the proposal. In 1998 the ALA Executive Board also approved the proposal 'in concept'. ALA leadership envisioned the program as a voluntary post-Masters regimen wherein candidates demonstrate evidence of competencies in a number of critical areas such as finance, personnel, facilities, technology, security, leadership, fundraising, and service to diverse populations.²

A key obstacle to the proposal was the federal tax-exempt status of the American Library Association and its Divisions. Under the federal tax code, the Association as a charitable organization was fully able to establish standards for the profession and offer educational opportunities to assist professionals to meet and maintain these standards. However, as a 501(c) 3 charitable organization, ALA was not permitted to certify individuals. Under the U.S. federal tax code only 'Professional Societies' organized as 501(c) 6 organizations are permitted to do so. The answer was deceptively simple: create a twin 501(c) 6 organization for ALA to offer certification for Public Library Administrators and similar professional competencies. This type of organization could also undertake lobbying efforts in areas such as compensation and salary issues not allowed ALA as a 501(c) 3 association.³

The proposal for the ALA-Allied Professional Association (APA) was not met with universal approval. Significant concerns were raised within ALA regarding the necessity for such a separate organisation. Educational institutions voiced their concerns regarding potential competition from their own professional association and genuine concerns were (and still are) expressed regarding the financial viability of the enterprise since it cannot be subsidized by ALA and must be self sustaining. Subsequently additional issues have come into play, most notably ALA's campaign for professional compensation and the call for certification of library support staff. Nonetheless, the process continues.

As of this writing ASCLA, PLA and LAMA are in the process of establishing a *Standard of Professional Practice* that will be utilized by APA as the benchmark for their certification process. The certification will require individuals to provide evidence of professional level coursework in several critical competencies. Course providers will be required to offer appropriate content and to provide and implement a mechanism for outcomes assessment in order to be recognized by ALA-APA. Ultimately ALA-APA will be able to certify professional public library administrators as meeting nationally recognized standards in education and experience, an essential step to the future success of public libraries in the United States. For a comprehensive examination of the process and timely information on the ALA-APA certification program visit <http://www.ala-apa.org/>.

Development of a certificate program at the Palmer School

The program offered through the Palmer School of Library and Information Science is a post-Masters curriculum resulting in a Certificate of Advanced Studies in Public Library Administration. It consists of a fifteen credit hour five-course sequence for students who already have the MS in LIS degree and are aiming for more senior jobs in the administration of public libraries. The program is aimed at professional librarians already working in public libraries and is approved by the New York State Education Department. This program is the result of an eight-year effort by regional library administrators and organizations to develop a meaningful educational experience for the next generation of public library leaders. The continued success and growth of this program is a direct result of four factors: content, cost, recognition, and reward.

In 1996, the Public Library Directors' Association of Suffolk County (Long Island,

New York) and the region's public library system, the Suffolk Cooperative Library System, determined that the growing sophistication of their libraries required a far more formal effort in administrative continuing education and training. The library system, similar to many cooperatives in New York State, is comprised of 56 independent public libraries. The libraries submit their operating budgets to their community voters annually for approval. Most of the Library Boards are elected as well. Today, the average library budget in this region is more than two million dollars.

The result of these discussions was the development of a post-Masters graduate program consisting of five three-credit courses in the areas of management; law and legislation; human resources; facilities and technology; and finance. The concept was modeled after the New York State Education Department's School District Administrator's Certificate and first offered as a contract course by the library system through the State University of New York at Stony Brook. The curriculum was developed in an effort to focus on the practical, as well as theoretical, aspects of public library management. The primary instructor and project coordinator was (and still is) a well-known public library administrator in the area with considerable teaching experience. Numerous subject specialists and experts from the field are brought in to teach particular classes to add their insights in the practice of library management.

In 2003, the program was moved to the Palmer School of Library and Information Science at the C.W. Post campus of Long Island University to take advantage of the University's institutional commitment to graduate programs in librarianship (including the PhD) and to access their graduate schools in business and public administration. In turn, the University petitioned the New York State Education Department to recognize graduates of the program as completing a State approved Certificate in Advanced Studies in Public Library Administration. In September 2004 the New York State Education Department formally recognized the program as an Advanced Certificate in Public Library Administration, the first such state approved program in the nation.

Overview of the certificate program

The Public Library Director's Certificate Program consists of five courses, which carry graduate academic credit and culminate in a Certificate in Public Library Administration. The five course content areas are:

- Principles of Public Library Organization & Management
- Financial Management of Public Libraries
- Human Resource Administration in the Public Library
- Legal Issues & the Regulatory/Governance Environment of the Public Library
- Public Library Facilities, Automated Systems and Telecommunications

Students in the certificate program are encouraged to register as a cohort, learning together through the five courses while establishing a professional network that will stay with them throughout their careers. However, the quality of the offerings has also attracted sitting directors anxious to increase their knowledge in particular areas of library administration by taking an occasional course. Thirty-four public librarians are presently enrolled. Of the fifty-one students who have completed the program since 1996, well over half are now serving as public library directors or assistant directors in the Long Island region. Commencing in January 2005, the certificate program was offered on two L.I.U. campuses on Long Island and, in the fall of 2005, it will be offered at the Westchester (on the mainland) campus as well. Plans call for developing online versions as well as intensive, weeklong seminars to be offered at remote sites. Also being planned is a mini version of the program designed for Public Library Trustees.

Lessons learned

There are several aspects necessary to assure the success of such a program, even with the most appropriate coursework and interesting instructors. These include institutional support, a tangible reward for participants and reasonable cost for the program.

In addition to a demonstrated professional need, there must be a tangible reward for the students upon completion. There is of course the factor that possession of the certificate puts those who have completed the program in a more competitive position for senior jobs. However, public libraries, unlike many public school systems, offer no direct financial incentive for the completion of graduate coursework beyond the Master's degree. With this in mind, discussions were held with the regional and state civil service departments to incorporate the components of these courses into the public library director examination series in New York State (most public libraries in the region are governed by Civil Service regulations.) Those who have successfully completed the program receive additional credit on their examination and therefore are at the higher end of the eligible lists. This represents a very tangible and persuasive reason for a working librarian to pursue a graduate course each semester for two and a half years. Furthermore, as time has gone by the 'market penetration' of the program has also created an expectation by library boards in the region for an advanced degree in management or completion of the program by candidates for administrative positions. The lesson learned is that if at all possible there should be some built-in tangible reward for completing a program such as this, above and beyond simply having a line on one's resume that you hope will make you more competitive.

A further critical concern, especially in the library field, is cost. Therefore each course in the certificate program is offered on either a one-credit or three-credit basis, with corresponding fees. The coursework is identical and the certificate is awarded regardless of the number of credits. However, those electing to matriculate in the program at the full three credit graduate level may submit the courses for transfer into other graduate programs, including the MBA, MPA or Ph.D. And, of course, should they find themselves in a system that financially rewards course work beyond the Masters degree, typically a system in which salary is tied to formal qualifications, then those credits would place them higher on the pay scale. Approximately 20% of the students opt for the full credit. This structure will sound quite unusual to those who hail from states where almost all tertiary education is at tax supported institutions, but in the North American context in which there are numerous independent non tax supported institutions, such as Long Island University, as well as tax supported institutions, this method works, fitting both the economic constraints of a private institution and the economic realities of the target population of working public librarians.

In addition to the financial cost to the student, there is also a sizeable opportunity cost to the student – the time expended to pursue the program. Particularly for students who are already working professionals, many with family commitments, all with other community commitments, this is a very real and significant cost. This results then in an obvious balance to be achieved between a program sufficiently extensive to impart substantial content, yet not so time consuming as to impose an unacceptable or impractical opportunity cost. It would appear that the success of this program demonstrates that something on the order of five graduate courses is the right size – of sufficient length to be content rich and not so long as to be impractical.

Another lesson learned is that programs of this sort should be based in an institution that regards LIS education as part of its mission. The institution in which this program was originally housed was chosen primarily for the convenience of its physical location, and because as a tax supported institution it could offer low tuition fees. However, little support

was provided and no attempt was made to register the program with the appropriate authorities, and it was clear that should the product champion move on to other challenges elsewhere, the program would be allowed to fade. With the program housed in an institution with LIS education as its mission, it is no longer dependent on the enthusiasm of one or two product champions, but is now woven into the fabric of the Palmer School.

Other North American programs

This area of post-Masters education for public librarianship, though much discussed is one that has received comparatively little attention from accredited LIS education programs in North America. The Palmer School program is certainly not the only program that addresses this need, but it is the case that to date the concern of the public library community has elicited very little response from LIS educators. A call on *Jesse*, the listserv that serves LIS programs in the U.S. brought forth very little response. What we have uncovered, in descending order of similarity, is:

Louisiana State University, LSU, offers a post masters program in government administration. It is a cooperative effort between the School of Library and Information Science, SLIS, and the Public Administration Institute. The Public Administration Institute is a department within the Center for Economics and Business Administration. Individuals who have obtained their Masters degree in library science, but who seek additional post-Masters training in government administration, are allowed to enrol in SLIS's post-Masters certificate program, and specialize in public management. Students can take courses in the Masters of Public Administration program. The courses focus on budgeting, personnel, program evaluation, and policy analysis. The students may also take courses in the MBA, Master of Business Administration, program.

The program requires 24 credit hours (eight 3 credit courses, of which at least two must be LIS courses, at least two from public administration or business administration, and including three credit hours of directed independent study).⁴ The LSU program is the only other program that we came across in our investigation that was designed with the proposed post-professional standards training program draft developed by PLA specifically in mind.

Queens College in New York is an example of a program that a student can tailor to public librarianship. Queens has a certificate program (post-Masters Studies in Librarianship) in which students, with the advice of a faculty adviser, select courses from Queen's regular offerings. The program is a 30 credit program (ten 3 credit courses).⁵ In their literature Queens does mention administration as an area that can be focused upon, but not public library administration *per se*. Dominican University has a similar post-Masters program, 15 credits (five 3 credit courses) in library administration,⁶ but again with no particular focus on public libraries. Several other institutions have similar programs.

The Professional Learning Centre of the Faculty of Information Studies at the University of Toronto offers a Certificate in Managing Information Enterprises program. This program is aimed at all information professionals, not just public librarians. It is short and concentrated, running over 14 days and consisting of seven 2-day courses covering the following facets: Applied Strategic and Business Planning, Change Leadership, Communicating for Decision Making, Designing Products and Services, Measuring Customer Satisfaction in Information Services, Project Management for Information Managers, and Information Audit.⁷ This program is much shorter than what is typically regarded as a certificate program, but much more extensive and coordinated than the usual run of continuing education workshops. (Non-North American readers should be advised that in North America and in the U.S. in particular there is nothing like the degree of

government control and regulation of higher education, including standards for nomenclature, that there is in most other countries.)

The Urban Libraries Council has run a program, called the Executive Leadership Institute, in which promising junior staff at large urban public libraries are selected to receive intensive one-on-one mentoring and education. The program was supported by grant money from the Institute of Museum and Library Services, a U.S. government agency. The program was regarded as quite effective, but because of its cost - approximately \$25,000 per person - it has been implemented only twice and for only a single digit number of persons each time. With the funding exhausted, it is quite problematic whether it will either be run again or serve as a model for other programmes. Another related model, almost certainly unique, is that the College of St. Catherine in St. Paul Minnesota offers an undergraduate certificate program in Urban Public Libraries. Undergraduate library education is uncommon in North America. The College of St. Catherine is not an ALA accredited institution *per se*, but it does offer the ALA accredited Masters degree in collaboration with Dominican University, and it has plans to apply for ALA accreditation in its own right in the near future.⁸

Conclusion

In summary, this paper proposes that the Palmer School program clearly meets the needs for post-Masters education that has been articulated by the public library community. Equally importantly, we believe that it can be a model for other such programs, a model that demonstrates how to meet the operational criteria of content, cost, recognition, and reward. It is hoped that the program and awareness of it will serve as a catalyst for the development of other similar programs. The recognition that professionally managed libraries require professional, trained library administrators is essential for the continued viability of our profession and our institutions. To prepare colleagues for the challenges of public administration programs of this type must be replicated throughout North America and be considered a prerequisite for a public library leadership position.

References

- ¹ ALA-APA *History of ALA-APA Certifications* (2004) URL <http://www.ala-apa.org/certification/certhistory.html>
- ² ALA-APA *Certified Public Library Administrator Program* (2004) URL <http://www.ala-apa.org/certification/cpla.html>
- ³ Ghikas, M., ALA Deputy Director, personal conversation, 27 January, 2005.
- ⁴ Ward, R., Assistant Professor, School of Library and Information Science, Louisiana State University, Personal communication, 13 October and 16 December 2004.
- ⁵ Blake, V. Acting Director, School of Library and Information Studies, Queens College, Personal communication, 7 October, 2004.
- ⁶ Srikantaiah, T. K., Director, Center for Knowledge Management, Dominican University, Personal communication, 12 October 2004.
- ⁷ Melville, K., Director Professional Learning Centre, University of Toronto, Personal communication, 13 October 2004.
- ⁸ Wagner, M., Director, Information Management Program, College of St. Catherine, Personal communication, 13 October 2004.

COMPETENCY BASED TRAINING: A SPECIAL LIBRARY ASSOCIATION (SLA) STRATEGIC PROFESSIONAL DEVELOPMENT TOOL FOR THE 21st CENTURY

Sylvia E.A. Piggott

Chair, Professional Development for SLA,
Montreal, Canada, H4A 3K9
spigot@sympatic.co

Abstract

The Special Libraries Association (SLA) was founded in 1909 and currently has its headquarters in Alexandria, Virginia, USA and serves more than 12,000 members in 83 countries. SLA embraces innovative solutions for the enhancement of services and intellectual advancement within the profession. This is achieved through the SLA Professional Development Department which provides educational products and services to increase its membership value in the information profession and to further members' career goals. The document *Competencies for Information Professionals of the 21st Century* which guides these products and services was developed and first published in 1997 and revised in 2003. This paper describes how within the framework of this document SLA is meeting the professional development requirements of its membership through competency based training and the use of diverse delivery mechanisms.

Introduction

The Special Libraries Association (SLA) is the USA based organization for innovative information professionals and their strategic partners. Its mission is to promote and strengthens its members through learning, advocacy, and networking initiatives. SLA believes that the librarian is an active intermediary between users and resources, and that professional and continuing education of the librarian is therefore indispensable. With adequate service depending on staff that are well prepared and continuously learning the quality of ongoing educational opportunities provided is of vital concern. There is also a responsibility for continuing education and professional development to be shared by individuals, their employing institutions, professional associations, and library/ information science education programmes

In 1997 the SLA decided to take a more formal approach to providing continuing education for its membership. As a first step it charged one of its committees to prepare a document which would describe the competencies which information professionals would need to have in order to be relevant in the 21st century. The document entitled *Competencies for Information Professionals of the 21st Century*¹ is the result of this charge. It is used as a point of reference by the three Professional Development pillars of the association namely, the Professional Development Committee, the staff of the Professional Development Centre, and the various units of the association who have a responsibility for selecting and delivering continuing education programmes to the members.

Reviewing and updating the professional development activities of SLA is an ongoing process and is part of the Association's philosophy of continuous improvement in all areas of its activities. The quality of service provided to the private and public sectors by library and information science professionals depends on the expertise and continuous updating of the skills of their staff. Constant flux in the needs of societies, changing technologies, and growth in professional knowledge demand that information workers must expand their understanding

and update their skills on an ongoing basis. The content of the document is therefore under constant review and is updated as the information environment changes.

Competencies for Information Professionals of the 21st Century

The *Competencies for Information Professionals of the 21st Century* document is a point of reference for all aspects of continuing learning and professional development within the association. Competencies relate to the practitioner's knowledge of information resources, access, technology and management, and the ability to use this knowledge as a basis for providing the highest quality information services. The Competencies document identifies four major areas of competencies in which the information professional must demonstrate professional skill; namely managing information organizations, managing information resources, managing information services and applying information tools and technologies.

Information professionals manage information organizations ranging in size from one employee to several hundred employees. These organizations may be in any environment from corporate, education, public, government, to non-profit. Information professionals excel at managing these organizations whose offerings are intangible, whose markets are constantly changing and in which both high-tech and high-touch are vitally important in achieving organizational success. They also have expertise in total management of information resources, including identifying, selecting, evaluating, securing and providing access to pertinent information resources. These resources may be in any media or format. Information professionals recognize the importance of people as a key information resource. Managing the entire life cycle of information services, from the concept stage through the design, development, testing, marketing, packaging, delivery and divestment of these offerings is also within their remit. Information professionals may oversee this entire process or may concentrate on specific stages, but their expertise is unquestionable in providing offerings that enable clients to immediately integrate and apply information in their work or learning processes. There is an imperative to harness the current and appropriate technology tools to deliver the best services, provide the most relevant and accessible resources, develop and deliver teaching tools to maximize clients' use of information, and capitalize on the library and information environment of the 21st century.

In addition to the four major areas mentioned above, *Competencies for Information Professionals of the 21st Century* also identified personal and core competencies as being crucial to the success of anyone working in the profession. Personal Competencies represent a set of attitudes, skills and values that enable practitioners to work effectively and contribute positively to their organizations, clients and profession. These competencies included being strong communicators, demonstrating the value-add of their contributions, remaining flexible and positive in an ever-changing environment. Core Competencies anchor the professional and personal competencies. SLA believes that these two competencies are also absolutely essential for the success of every information professional.

Information Professionals (IPs) understand the value of developing and sharing their knowledge; this is accomplished through association networks and by conducting and sharing research at conferences, in publications and in collaborative arrangements of all kinds. IPs also acknowledge and adhere to the ethics of the profession. The importance of all of the competencies described above cannot be emphasized enough. They are paramount to the value and viability of the profession. Courses and other educational opportunities developed for membership must always be mapped back to the competencies outlined above and presenters are asked to indicate which of these competencies or skill will be learnt for any course proposal submission.

Strategic priorities

SLA has embedded (and regularly reaffirms) the importance of learning as a key activity in its strategic plan. There is also a concerted effort to ensure that all appropriate media are used to deliver professional development offerings. The objective is ease of access for all. One of the strategic priorities therefore is, Innovation and Learning, a concept which embraces the content of *Competencies for Information Professionals of the 21st Century* and expands it at the same time. There are a range of approaches to the implementation of Innovation and Learning. The findings of the Professional Development Committee learning surveys are used to develop a matrix of topics for the Professional Development Centre to deliver to the membership at large throughout the year as well as to recommend topics to the 52 Chapters (geographically located) and the 28 Divisions (subject interest groups). As the Competencies document dictates, the content offerings are targeted to professionals at different levels in their career - for example, emerging leaders, mid-career leaders, and experienced leaders. An online learning community for information professionals at different levels of experience and different stages of their careers has been established. This ensures that members who cannot attend annual conferences at which professional development opportunities are available can take advantage of the same offerings from their desktops or via video-conferencing.

Efforts have taken place to expand and improve the Virtual Seminar Series, offering at least two programmes per month. Chapters, Divisions or individual members can sign up to listen in to these presentations from their own location. In some cases, members will gather at a local site in order to share the cost of participating in these seminars. This series will be regularly measured to verify increases in overall participation year over year as well as to see if there is a positive financial impact to the bottom line.

Another strategy has been the development of a detailed course plan outline for a certification programme and seek accreditation by a recognized accrediting body. The Competencies document sets out a curriculum which enhances and upgrades the normal curriculum of the library and information science schools. Certification of the Competencies curriculum once recognized, can be used by practicing information professionals on the job for hiring, promotion, and advancement. The feasibility of partnerships with institutions of higher learning to provide discounts to SLA members who participate in their schools' distance learning programmes have been explored. The Competencies document content will be mapped against the offerings of the institutions to ensure that members are indeed getting courses comparable to those described in the document. Several institutions have been identified and some Memoranda of Understanding (MOU) have been drawn up between SLA and these institutions.

Joint professional development programming with Association partners in the information industry have been investigated who have bought into the philosophy and content of the Competencies document. The goal is to have these partners provide financial sponsorship for sections of the curriculum. This is especially feasible for our partners in the information technology sectors since there is a large technology component in the Competencies document and there are opportunities for delivering some training via electronic means which they own. Examination has taken place of SLA's annual conference programming and logistics since there is a large educational component to the annual conference, where two to three days of courses are delivered, as part of the pre-conference offerings. The objective is to engage members, partners, and prospective members in this process in order to verify the relevance of the programme offerings as well as to gauge customer satisfaction. The plan is also to seek new participants, instructors, and method of delivery as part of the continuous improvement process. The association receives an average

of 5,000 to 7,000 members at its annual conference which is held for 4-5 days. This therefore provides a captive audience of a significant number of its members.

SLA structure for delivering professional development and continuous learning

SLA is structured in such a way that members have access to professional development and continuous learning from four major groups. The Professional Development Department (PDD), is responsible for the strategic priorities embodied in the Innovation and Learning concept and its vision is to help information professionals become indispensable through learning. Its mission is to help information professionals become more capable learners and more capable professionals. It has set itself an ambitious goal that is to set the standards for learning and development throughout the global community of Information Professionals. As described above, it has a grand plan for implementing its Innovation and Learning concept and is making good progress in signing on partners. The Professional Development Department is also responsible for the implementation of best practices and assists the local units in this area as well. Best practice requires that there be;

- regular learning needs assessment,
- a broad range of learning opportunities in a choice of formats that are designed to meet identified needs and that cover topics sequentially from introductory through advanced,
- widely disseminated information about continuing education and resources,
- course instructors selected on the basis of both subject knowledge and teaching ability,
- consistent documentation of individuals' participation in learning so that recognition of participation in continuous learning will be considered in hiring and promotion decisions,
- evaluation of continuing education and staff development offerings and programmes,
- research to examine the efficacy and outcomes of continuing education and staff development programmes.

One of the guiding principles of SLA is that information professionals can play many varied roles—from creating and sharing knowledge and influencing strategic decision - making to creating new sources of competitive advantage and facilitating the learning of others. This will lead to them becoming exceptional contributors to their organisations. The Professional Development Department is charged to support this principle while ensuring customer satisfaction and financial stability.

The Professional Development Committee (PDC) is named by the President of the Association and is made up of members with different levels of skills and years in the profession. This mix ensures that the programmes designed by the committee take into consideration the requirements of members at different levels in their careers. The PDC has a strategic role in working with the SLA Board to develop strategies for the professional development role as well as for updating *Competencies for Information Professionals of the 21st Century* when necessary. This is the group that has the ear of the membership in terms of their educational requirements. The Committee uses the input received from members to collaborate with the Professional Development Department in providing a well rounded curriculum of courses as reflected in the Competencies document.

The other two Divisions are made up of members with a common subject interest and Chapters which are geographically dispersed. They also have a professional development and continuous learning responsibility for their constituents. These two units also collaborate with both the PDD and the PCC in their efforts to provide courses, seminars and other educational

offerings to their membership throughout the year. These units are at liberty to concentrate on any aspect of the curriculum set out in the Competencies document depending on the stated requirements of their constituents. SLA headquarters will assist them in finding speakers and teachers when called upon to do so.

Educational priorities in progress with some strategic partners

As SLA continues to refine its PD programmes, it continuously reviews all aspects of its offerings and all input received and changes course when indicated. The changing environment and the rapidly evolving technology are also playing a role. These factors, coupled with the Association's ability to attract financial support and educational partners, have led to the recent establishment of several significant initiatives.

The SLA Online University has been developed which is an online system that will provide information professionals with access to courses and content in a variety of subject areas. The Creation of the SLA Online University in partnership with Elsevier will serve the continuing education needs of information professionals worldwide. Because of reduced budgets for professional development and travel, many SLA members around the globe lack the ability to participate in person at learning events. Using a technologically advanced learning system, the SLA Online University will give information professionals access to course libraries focusing on development of critical business skills. In addition the curriculum will comprise custom-designed courses on competencies that are crucial to the profession, such as content management, competitive intelligence, and identifying client needs. SLA also expects to enhance the offerings of the Online University by including discounted access to online learning courses from many leading universities. It will also give information professionals worldwide, the opportunity to learn where and when they choose, collaborate with others in multiple languages, and engage other learners to expand their perspectives.

Three distinct course libraries have been acquired that will include over 200 courses focusing on broad areas of the Competencies document as well as on executive development. Translation of a focused set of courses into other languages, particularly French and Spanish in order to serve its diverse membership better has taken place. There has also been the conversion of a variety of SLA learning experiences into self-paced online courses to improve access by those who cannot attend face-to-face presentations. Enhancement has occurred of the Virtual Learning Series and the Career Development Series content including hiring professional instructors. An Internet-based video and audio delivery system has been purchased for all live and recorded SLA learning experiences. This will improve the chances of more members gaining access to these offerings. Contracting with internationally recognized field experts has been set up to deliver a balanced set of learning experiences that meet the needs of SLA's diverse audience both in North America and abroad. An Internet studio at SLA's Global Headquarters has been constructed for the purpose of producing live and recorded learning experiences for SLA members.

In addition, SLA has been in discussions with various external partners to identify common interests and joint working opportunities. Working with SLA, the President of Drexel eLearning has developed a proposal to match Drexel's online courses to SLA's competency document and to offer these courses to SLA members at a discount. The proposal was approved by the Dean of the Library School and final approval is expected in the near future. Syracuse University has agreed to partner with SLA by offering their summer online courses to SLA members at a substantial discount. WISE is the Web-enabled Information Science Education Consortium, headed by Syracuse and the University of Illinois, Urbana Champaign. This is a group of 12 universities with robust online programmes who are operating under a special grant to share courses and develop standards for online information

science education. They have not only agreed to partner with SLA, but have chosen the SLA 2005 Annual Conference as the site at which they will announce and launch their initiative. Once their shared courses have been established, they will offer them on the SLA online university site at a discount to members. The Director of the Professional Learning Centre at the School of Information Studies at the University of Toronto, Canada is in discussion to partner with SLA to offer their courses to SLA members at a discounted rate. The plan is to initiate this programme in conjunction with the launch of the SLA Online University.

Engaging users in the process

SLA is very aware of the importance of engaging its members and other constituents in any process that requires their buy-in. With this in mind, surveys are sent regularly to members requesting their input, and that input is taken into consideration when designing a plan of action for Professional Development. Various key messages were gleaned from recent surveys. The message that 'the price is too high' figured repeatedly (both for virtual seminars and for Continuing Education (CE) courses). Members specifically identified US\$100 as the preferable cost. However, a significant number were willing to pay up to US\$500. One can assume that those willing to pay the higher price generally get financial support from their employers. Given this finding, there is clearly a need to come up with inexpensive solutions within the budgets of many who do not receive institutional support. Many also expressed an interest in affordable distance education courses since this delivery method would eliminate the additional cost of travel and subsistence.

The first preference for delivery mechanism is class-room type courses, with self-paced, distance learning, one-day classes, delivered over the web running a strong second. Very few were interested in virtual seminars or other means of delivery. Participants in the survey preferred not to have to take more than a day away from work in order to participate in a course. Courses and other educational opportunities available at the annual conference are the exceptions since participants are generally at the conference for several days. SLA therefore takes advantage of this opportunity to offer a diverse set of professional development courses. SLA will also be testing various ways of fulfilling this need for high quality one-day courses as requested by the membership. Some of the initiatives described above under the Innovation and Learning implementation plan will also alleviate some of high cost.

One interesting finding was that there was a need for instructions in the 'basics' for those practicing as librarians but who do not have the benefit of formal library training at the graduate level. SLA is an international organization and has members whose countries do not require education in librarianship at the graduate level. Therefore, hands on practical skills oriented opportunities are wanted. At the other end of the spectrum there is a call, especially by North American members, for a certification programme in specified areas such as Knowledge Management. SLA is in the process of using the competencies content to develop a curriculum in preparation for a certification programme. In addition, a number of subject areas were identified as being of great interest namely:

- Technology - opportunities to learn about 'the latest' in information architecture, open access, intranets, database design, object modeling, metadata (etc) and how those techniques are applied in real situations.
- Knowledge Management (KM)- has been covered widely in recent years but there is a need for courses at a practical level as many are still grappling with the implementation of a KM programme within their organizations.
- Business skills - ranging from finance/budgeting to dealing with staff and co-workers, communicating with management, improving negotiating skills,

needs assessment; information audit, business plan development -- in short, survival skills in a competitive market. These skills are not peculiar to information professionals but are the same skills required by other professional groups. These competencies will help the practicing professional to remain relevant and advance their careers in their organizations.

- Marketing/Selling - including lobbying and presentation skills are seen as key requirements in getting adequate resources as well as attracting target groups to their services.
- Future trends - such as information technology coming on stream as well as those going out of use. In addition, there is great interest in business trends, including globalization and its effects and impact on the information industry and the information professional.

Over the years, SLA has been making a concerted effort to attract high quality presenters and educators. In terms of educational level and the quality of instructions, the members have continued to express some concern for the quality of the instruction. They would prefer fewer course offerings but with instructors with high quality knowledge and the ability to teach. The sentiment was that not everyone who knows a subject is able to impart that knowledge to others in an inspiring way therefore in many instances learning did not take place. SLA's response to this is to create standards against which instructors would be selected. For example, presenters will be pre-tested for course knowledge; the level at which they can deliver, and evidence of past success in delivering such courses.

In addition, there is a requirement for the instructor to answer questions around course content evaluation, course description, intended audience and prerequisite, course content, key take aways, teaching approaches, course design and instructor qualifications. In order to collect data on courses offered by SLA each participant in a course is asked to fill out an evaluation form, one for class room delivery and one for electronic delivery. This input is reviewed and recorded for future use. The Professional Development Department has implemented an electronic system which will hold these evaluations for no less than 3 years and may hold them as long as 5 years. The objective is to be able to use this database as a PD management decision tool.

SLA expects that collecting this data before approving continuing education courses will help to eliminate unsuitable topics and instructors and therefore improve customer satisfaction ratings. There is also a desire to seek appropriate partnerships with other professional associations in order to leverage off their skills, especially in areas which are common to all professions, namely management and technology.

Conclusion

Providing professional development and continuous learning opportunities for a membership as diverse as that of the SLA is a challenge. SLA's strategy to base its professional development and continuous learning offerings on *Competencies for Information Professionals of the 21st Century* ensures that its members in particular and information professionals in general, who participate in its programme, will be well prepared for the future job market. Because the document is continuously updated and mapped to the information environment, it ensures the information professional's relevance in the information market. Many of its innovative programmes are in their infancy and will continue to evolve as the environment in which information professionals work, changes. SLA's responsibility to its members to ensure that they receive value for their money is taken very seriously. Therefore, courses, presenters, and evaluations are scrutinized to verify that the established standards for delivering professional offerings are met.

SLA sees professional development and continuous learning as key deliverables to its members and is in the process of utilizing a host of delivery mechanisms in the process. The plan to develop a detailed course plan outline for a certification programme which would be accredited by a recognized accrediting body has not yet been realized but is on the agenda for the near future. In addition, SLA is just settling into its new headquarters, and so construction of an Internet studio at SLA's Global Headquarters for the purpose of producing live and recorded learning experiences for SLA members is also on the agenda for the near future.

By consistently asking for customer input in order to improve the programme and keeping abreast of, and employing the new technological tools, the Association will be a key player in the professional development arena. In addition, its ability to attract significant partners in the industry and in academia can only serve to improve accessibility, reduce cost to its clients, and ensure relevance of its professional development programme. Finally, members' feedback has indicated to SLA that the established professional development structure, in conjunction with the implementation of *Competencies for Information Professionals of the 21st Century*, meet their requirements for remaining relevant and valuable within their place of work.

References

¹ Special Libraries Association. Special Committee on Competencies for Special Librarians. *Competencies for Information Professionals of the 21st Century*. rev. ed. Washington: SLA, 2003. URL <<http://www.sla.org/content/learn/comp2003/index.cfm>>

MULTI-PROFESSIONAL WORKING AND LEARNING?: TEAMS OR TERRITORIALISM IN THE E-LEARNING AGE

Sue Roberts

Head of Learning Services,
Edge Hill College of Higher Education,
Ormskirk, Lancashire, L39 4QP UK
robertss@edgehill.ac.uk

Abstract

This paper focuses upon the changing roles of library and information professionals in educational settings in the context of e-learning. The focus is on UK higher education but the issues explored have resonance with other contexts. The paper particularly highlights the impact of the rise of learning technologists as a professional group over the last decade and their relationship with the role of the information professional. Several studies of the roles of learning technologist and subject librarian/information specialist highlight similarities and blurred boundaries as a result of the growth in e-learning. Evidence suggests that this ‘convergence of roles’ can either lead to the development of multi-professional teams and multi-professional learning, or to conflict and disputed territories. This paper explores developments in the two roles, reviewing the literature and providing a case study; it then proceeds to suggest models for multi-professional working and learning. Whilst partnership with academic staff is not the subject of this paper, it must be stressed that this is key to e-learning developments.

Introduction

E-learning has rapidly become an integral part of UK higher education (HE), though not, as originally anticipated, as a replacement for face-to-face teaching. E-learning is defined here as “the use of digital technologies and media to deliver, support and enhance teaching, learning, assessment and evaluation”¹ and as such can involve a range of technologies and tools. ‘Blended learning’ as a term has also gained credence, providing a spectrum of methods and approaches that range from learning and teaching occurring purely online, to e-learning elements complementing face-to-face learning. Within this context library and information services and their staff have taken a variety of roles. Whilst involvement is far from consistent, either within or across institutions, library and information services’ staff are undoubtedly becoming increasingly active in e-learning and this is impacting upon their roles, professional identity and relationships with other groups of staff. This is particularly pertinent in relation to the ‘new professional’ group of learning technologists who have emerged as a recognizable body over the last five years. The changes in the two roles are explored here in the context of collaboration. This paper proposes that for effective e-learning development to take place a multi-professional team approach is crucial. Such a team approach can be fostered by the development of mutual understanding of roles and by collaborative learning. The case study presented here explores a model of such working and learning in a UK higher education institution (HEI).

The e-learning imperative

E-learning is very clearly on the political agenda for universities in the UK, indicated by the draft e-learning strategies of both the Department for Education and Skills (DfES) and

the Higher Education Funding Council for England (HEFCE). But why is e-learning viewed by government as so key to the future of higher education and to lifelong learning?

[it] is important because people are finding that e-learning can make a significant difference: to how quickly they master a skill; how easy it is to study; and, of course, how much they enjoy learning. It is important because it can contribute to all the Government's objectives for education – to raising standards; improving quality; removing barriers to learning and participation in learning; preparing for employment; upskilling in the workplace; and ultimately, ensuring that every learner achieves their full potential.²

Such national emphasis is also reflected in local developments with many HEIs developing e-learning strategies, adopting an institutional Virtual Learning Environment (VLE), and establishing E-Learning Development Units or teams with the associated growth of learning technologist roles. The commitment to e-learning within the UK HE sector is evidenced in two reports commissioned by UCISA (Universities and Colleges Information Systems Association); the first documents the rise of the use of VLEs in 2000 and 2001, whilst the second continuation report in 2003 observes that “The overall picture is one of evolutionary consolidation. Centralisation is increasing of matters considered strategic”.³ This image of e-learning as a force for change is reinforced by Jenkins and Hanson, as “[it] will require change at all levels of an institution and for all categories of staff”.⁴

Consequently, it is clear that technological developments have impacted considerably upon the HE learning environment. However, it would be overly simplistic to take a purely technologically deterministic view of change. The e-learning imperative must be couched in the context of the rising profile of learning and teaching itself generally. Political acknowledgement of this is evident in the Dearing Report's⁵ desire that the effectiveness of teaching and learning should be advanced. In addition, this is reflected in such imperatives as the need for HEIs to develop their own Learning and Teaching Strategies, introduced by HEFCE in the 1990s. A key indicator and driver of this trend has been the introduction of the Institute for Learning and Teaching in Higher Education (ILTHe) to set and raise standards (this has since been merged into the HE Academy, established in 2004). With a focus on recognising and rewarding excellence, HEFCE has also introduced the concept of Centres for Excellence in Teaching and Learning (CETL). The CETL initiative has two main aims. Firstly, to reward excellent teaching practice, and secondly, to further invest in that practice so that the funding delivers substantial benefits to students, teachers and institutions.

E-learning and convergence models

This emphasis on learning and teaching, and on the opportunities that new learning environments aided by technology bring, is having a significant impact on professional roles across HE and on the ways in which groups work together. This can usefully be explored within the concept of models of convergence. Convergence emerged as a central and influential notion in the UK library and information literature following the publication of the Follett and Fielden Reports.^{6,7} Convergence can be defined relatively narrowly, as;

“the bringing together of the library and computing services, possibly with other separate support services, under the management of an executive director”.⁸

Or, more loosely, as the bringing together, either organisationally or operationally, of different elements of academic support services. Fielden cautions, “It would be a mistake to focus just on computing and libraries coming together”, and points to different convergence models between library and information services and other services with responsibilities for IT, staff development, media, reprographics, student welfare and educational development.⁷ This explicit warning not to focus too exclusively on certain models, with the prediction of

mergers with “new technology services” and student services, is particularly pertinent in the more recent e-learning environment.

There is another model of convergence that moves away from organisational and formal models, stemming from the notion of ‘academic convergence’ articulated by Fielden.⁷ This notion of role convergence has been further developed in the context of learner support and learning technologies with the concept of ‘learner-centric services’ placing the learner at the core with a range of staff converging on them.⁹ Authors such as Currier¹⁰ and Core¹¹ have also pointed to the need for new convergences between library and educational development services as well as computing in the light of developments in e-learning. Core recommends that support services in general need to develop models for support that “cross organisationally discrete services”.¹¹ It can be argued that this second model of convergence, with its aim to maximise the focus on the learner (and not technology or systems) has been more significant in “making a real change to the student (and academic staff) experience of a learning environment”.¹²

A clear theme in the literature is that support for e-learning is needed from a range of (often dispersed) services and professional roles – IT, Library, Educational development, new E-learning development units – and that it is consequently imperative that “cognate areas are linked or work closely together to help encourage synergy in working practices”.⁴ It is the synergy and collaboration between two specific groups to which this paper now turns.

Impact of e-learning on library and information services

Library and information services are increasingly involved in e-learning at various levels, for example in the discovery and embedding of electronic resources, the design of materials, e-support and e-tutoring. Allen suggests that “E-learning is becoming an increasingly important approach to user education, information literacy and also staff development”,¹³ a view that is evidenced the growing case studies of library and information services involvement in e-learning projects, particularly in relation to electronic resources and supporting learners online.⁹

As highlighted above, new organisational models are also providing new opportunities. Whilst no two HEIs will have exactly the same models of convergence, there are examples of broadly based ‘Information Services’ or ‘Learning Services’ which have incorporated e-learning development teams. Where this isn’t the case, library and information services’ staff are increasingly working in collaboration with staff from other services such as Educational Development Units to provide support, resources and frameworks for e-learning developments. Many authors and practitioners see e-learning as a great opportunity to develop new partnerships, to inform strategic direction, to influence, and to reposition library and information services.¹⁵ There is, however, the perceived threat that library and information services can be and will be bypassed in e-learning developments, for in the e-learning environment “many of the established mechanisms that were once in place to support teaching and learning have been compromised, or overlooked...In many instances this has included the library”.¹⁵

The role of the library and information professional

There is a focus in the library and information literature upon the changing role of the subject librarian or information specialist. This group is depicted unanimously as being at the forefront of change and role development (see for example Pinfield¹⁶ and Moore¹⁷ for a UK perspective). This emphasis is also reflected by US and Australian authors such as Stoffle¹⁸ and Riggs.¹⁹

The role of subject librarian is not itself unambiguous with several authors seeing the changes in job titles – ‘Academic liaison adviser,’ ‘Learning Adviser,’ ‘Subject Liaison’ etc - as indicative of role developments and complexity with an increased focus on the learner and learning and teaching. This paper uses the different terms interchangeably, intending to refer to the widest range of roles that are directly involved in learner support. Changes in these roles have been well documented in the literature over the past decade and can be categorised broadly as:

- more proactive approach to academic liaison,
- role in delivery of learning and teaching particularly but not exclusively in relation to information literacy development,
- technology-related change for example skills required for Networked Learner Support, impact of e-learning,
- move towards more strategic alliances and partnerships via both formal and informal convergence.

The key messages emerging from the literature are that the role of the academic librarian is growing closer to that of the academic and is also closely related to the relatively new role of the learning technologist. This is particularly true in the context of networked learning support where information specialists have developed new approaches to supporting learners in the electronic environment, for example, using online tutorials, embedding e-resources into VLEs.

The rise of the ‘new professionals’

In the context of developments in learning and teaching and technology, the UK HE sector has seen the emergence of a new group of professionals –learning technologists. Definitions of learning technology and learning technologists are a useful starting point. The Association of Learning Technology (ALT) understands learning technology as “the systematic application of a body of knowledge to the design, implementation and evaluation of teaching and learning”. Learning technologists apply “learning technology in practice and/or do research into learning technology”.²⁰ Interestingly, ALT emphasise that a wide range of individuals have learning technology as a core part of their role – across a range of sectors, not just HE – and that “you do not have to be called or to call yourself a learning technologist to be one!” This latter point highlights the complexity and potential blurring of roles as learning technology can form an element of many other roles. This is also reinforced in Beetham’s research into the career development of learning technologists.²¹ She found three groups of staff in the HE sector who were involved in learning technology work:

1. New specialists, including educational or technical developers, researchers and managers. New specialists tend to be multiskilled and peripatetic, but with learning technologies at the core of their professional identity.
2. Academics and established professions (such as librarians) who have incorporated an interest in or a formal responsibility for learning technologies into their existing professional identities.
3. Learning support professionals that support access to and effective use of learning technologies. Unlike new specialists they do not regard learning technologies as the defining focus of their professional identity but as the context in which they are working.

The rise of the learning technologist as a recognised profession has been supported by the work of a range of writers. They have argued that this group do now have a sense of their own professional identity; they are developing their own community of practice, associations, networks and moving towards a professional accreditation scheme. As Oliver states,²² there is

no definitive account of the development of the learning technology profession internationally. His study of learning technologists' experiences and practices in the UK is key to our current understanding of this new professional group.

To summarise, a review of the literature demonstrates that there is a group of professionals "comfortable to be called learning technologists, working with shared values and specialist knowledge".²² It is clear that library and information staff are often involved in aspects of learning technology work and are developing partnerships and collaborations with learning technologists as well as with the more 'established' groups such as academics and IT technicians. However, contrary to this impression of partnership, a quite different narrative is also emerging. The language of territorialism and conflict is very evident in some of the literature around e-learning and professional groups.²³ In the context of such contradictions, there is little in the literature that explores these new relationships and ways of working in detail, and little that develops our understanding of the impact on roles, and the implications for continuing professional development.

The multi-professional team model

This paper has briefly explored the two roles of the academic librarian and learning technologist – one role well-established yet undergoing significant change, the other extremely new. The literature suggests that these two groups are working together with academic staff in teams. To further our thinking on how these two roles are working and learning together, it is helpful to consider the concept of the multi-professional team. There are numerous terms relating to team development. These include: 'Multi-professional', 'Multi-disciplinary', 'Hybrid', 'Multi-skilled', 'Cross-functional'. Such terms are often used interchangeably and without careful consideration of meanings. For the purpose of this paper we term 'multi-professional teams' is used to refer to teams comprising of a range of individuals drawn from different professionals groups. Clearly the nature and character of the teams will vary and could comprise of: academics, academic librarians, learning technologists, educational developers, skills support workers, IT/Computing staff. It should also be stressed that even these professional groupings and terms can be contested and that different roles and permutations will be found in different organisations. In many ways it is easier to define what a multi-professional team is not, in that it "should not be confused with that of a group of professionals who work independently but happen to liaise with one another over a period of time".²⁴

Within the library and information service context, convergence and the impact of new technologies have previously been emphasised as key drivers in the development of new team approaches. Authors such as Fowell and Levy²⁵ see networked learning support (where technologies and academic convergence collide) as demanding multi-professional teams, "a team of staff with complimentary skills which cross current boundaries between library and computing services and between libraries and academic departments". The impact of e-learning across higher education has further developed new educational spaces and possibilities and thus "new groupings, new communication patterns, new interactions and newer structures".²⁶ The *LTSN e-learning guides series* propose that e-learning is a catalyst for multi-professional team development because the skills required are found across a range of staff, and the stakeholders are more complex; "e-learning will be developed by teams of these new professionals aligned with the subject expertise of the academic".⁴

However, we must ask - how well-established are multi-professional teams and what is their impact on the learner experience and professional practices and roles? Beetham²¹ suggests that learning and teaching innovation is still, on the whole, focused at a project level with multi-professional teams brought together for short term collaboration. They are

anecdotally viewed as effective at delivering change in learning and teaching; however, there is little concrete evidence to support this. The following case study examples demonstrate a shift towards such teams but they are extremely embryonic and can be placed at different points on the continuum between collaborative project and established team.

Case study: Edge Hill

Edge Hill is a higher education institution in the North West of England, with 9,000 students on a range of degree and diploma courses and a further 6,000 on continuing professional development courses, particularly in education and health related areas. Edge Hill has strong centralised academic support structures enhanced by the formation of Learning Services in 2003. Learning Services incorporates learning resource centres and information provision, learning support, ICT user support for learning and teaching, e-learning development and support, media services, and dyslexia support. Introduced in 1999, the institutional VLE (WebCT) now supports over 400 courses delivered across the curriculum and currently has approximately 8,000 registered users studying on a range of courses, both undergraduate and postgraduate. The concept of blended learning is well established with many students experiencing mixed mode teaching. The administration, development and support for the VLE are managed within Learning Services by a team of learning technologists with staff working closely with academic colleagues. There is also a range of other staff actively involved in e-learning developments, primarily academic liaison advisers who are library and information specialists, the electronic resources team and senior managers with an active interest in the potential of e-learning for staff development. Staff are fully engaged in curriculum developments in a variety of roles with e-learning, electronic information, e-literacy, distributed services and support and learning technologies as key drivers.

Examples of working in partnership

Example 1: informal partnerships

Partnership working between information specialists and learning technologists can be traced back at Edge Hill to the first programme to use WebCT in 2000. This is documented by Davey and Roberts²⁷ who highlight the importance of bringing together different expertise for the benefit of both learners and staff, with each professional group using a new project to test out ideas, to find out about each other's approaches and to learn together. The integration of resources, support and information skills within the Postgraduate Certificate in Teaching and Learning in Clinical Practice provides a microcosm for VLE and hybrid library developments and illustrates the strategic issues relating to a holistic approach. This was the first fully online course at Edge Hill and consequently provided insights into delivering and supporting online learning as it gathered momentum.

Example 2: more formal partnerships

From 2001-2004, Edge Hill established the HEFCE funded COMET project (Collaborating and managing through the educational application of technologies). The project's main aim was to deliver institution-wide change through the embedding of technologies in learning and teaching. COMET aimed to foster collaboration between staff, thus enabling synergies and establishing more formal partnerships. The strategies that emerged during the project included;

- collaborative working amongst different groups of professional support staff,
- collaborative working between central support services and academic departments,

- collaborative work with partner institutions involving both academic staff and support services,
- joint staff development activities for the range of staff involved.

COMET has supported around 20 individual projects but more importantly has considerably aided the development of multi-professional relationships. (For example, see Martin's paper at this conference on 'The Bespoke Approach to Developing and Delivering Online Staff Development').

Example 3: developing a conceptual framework for partnership

During this period of project and partnership development, a conceptual framework began to emerge and to be discussed at Edge Hill. The concept of the 'New Academic Team' embraced this vision of a multi-professional team of academics, learning technologists and information specialists creating a learning environment and learning experiences with the learner at the centre. In the Edge Hill context this term refers to the three professional groups working together, particularly, but not exclusively, in the e-learning domain. This concept has started to become part of the institution's language and framework for learning and teaching development. In January 2005 Edge Hill was awarded Centre of Excellence in Teaching and Learning status by HEFCE for its work in supporting students online: SOLSTICE - Supported Online Learning for Students using Technology for Information and Communication in their Education. The following extract from the bid clearly articulates the partnership working at its core:

SOLSTICE is an innovative method of programme delivery that has been developed within the Faculty of Education in collaboration with Learning Services and the Teaching and Learning Development Unit over the last six years. It involves the use of supported online learning or blended learning designed on sound pedagogic principles and developed as a result of ongoing evaluative research. It seeks to capture the power of new technology to deliver programmes flexibly, using a virtual learning environment alongside other methods of support. It is learning focused not technology driven.

SOLSTICE is also a team of academic and learning support staff who have been responsible for developing the innovative method and for designing and delivering the programmes which have attracted plaudits of excellence from students, peers, and employers. The team is a hub of excellence and expertise in supported online learning.²⁸

Models of multi-professional working and learning

The examples above and the literature review indicate that multi-professional working between information specialists and learning technologists within UK HE can result in richer learning environments and opportunities for students. Whilst such team development is exalted in the literature, there is little evidence of research into how this is working in practice. Research in this area would enable us to plan more effectively for the learning environment of the future, for continuing professional development and for team working. This paper will now look briefly at two areas for further research – the model of multi-professional working and learning in the National Health Service (NHS) and the CPD models adopted by Edge Hill as a means of fostering work-based multi-professional learning.

NHS multi-professional team models

There is a well-established history of multi-professional teams within the NHS in the UK. They were originally advocated as a way to work with a wide range of consumer groups and to deal with complex client needs with the concept of different professional groups

coming together to learn and work for the benefit of the client an underpinning principle. The factors influencing these changes in the NHS can be seen to mirror the impact factors in the HE sector;

- rapid growth in knowledge and specialisation among professionals,
- increasing appreciation of inter-connectedness of many issues,
- effect of fragmented services on the consumer and a desire to be more seamless and holistic,
- changes in a 'core' role effecting other roles and leading to 'new' roles e.g. changes to role of medic, rise of Professionals Allied to Medicine,
- influence of government policy.

A major difference between the sectors is that within the NHS these developments have been the result of planned workforce strategy at a national and local level; given the autonomy of HEIs, such wide-scale planning has not occurred in the HE sector. Work by Scholes and Vaughan²⁴ explores cross-boundary working and its impact on roles in the NHS. Similar research in a HE context would enhance our understanding of multi-professional working and learning, and also possibly develop interesting parallels. The themes emerging from the NHS literature would appear to be similar to those emerging from the less well-developed HE literature: blurring roles, developing new and more flexible careers, new approaches to teamwork stimulating innovations in practice, and the language of territories and negotiation. McGrath's²⁹ exploration of the advantages and disadvantages of working in such teams could also be usefully applied to the multi-professional teams developing in HE. It is therefore suggested in this paper that models and concepts from the NHS literature on multi-professional teams could provide starting points and possibly frameworks for the development of a greater understanding of how different professional groups are working together in HE.

Work-based multi-professional learning

Staff at Edge Hill have found project-based experiential learning to be one of the most powerful tools for shared learning across professional groups. This is evident in the COMET project's sub-projects such as *Expertease* where the developmental process has been one of joint reflection. Within Learning Services the approach to supporting staff in relation to e-learning has been holistic and strategic. A cyclical approach has been developed with a number of e-support mechanisms providing frameworks for the development of awareness and skills at various points in the staff life cycle. All staff are expected to reach a certain level of understanding of e-learning whilst developing skills in using WebCT. For specific roles in learning support (of particular relevance to learning technologists and information specialists) this is reinforced by project and team work to enable staff to put skills into practice and to discuss issues with a wide range of colleagues. All staff use a WebCT-based staff induction (ProVIDE³⁰) enabling them to develop a basic level of awareness and skills irrespective of role. For those staff in learning support and learning technology roles further training and development is available to complement project work. This consists of;

- 8 week Developing and Delivering Online Learning online course where academic staff, learning technologists, information specialists and other learner support staff learn together online,
- additional specialised workshops - e-facilitation, e-moderating, technical skills,
- multi-professional teams providing a fertile soil for the scholarship of learning and teaching linked to innovation and multiple perspectives.

Conclusion

The emergence and growing significance of e-learning in its diverse guises offers information professionals opportunities for new approaches to learner support, strategic repositioning and role development. This paper has suggested that they can do this more effectively and holistically in collaboration with learning technologists but that there can be inherent tensions to overcome, notably issues relating to territoriality, differences in cultures and possible confusion with blurring of roles. At Edge Hill a multi-professional team model has evolved which secures the essence of each role and its distinctive contribution whilst focusing on commonality with the learner at the centre. The ability to work across boundaries, to take the initiative in team-building and to work in multi-disciplinary groups must be developed by academic librarians, learning technologists and by other professional groups. This paper also points to a need for further research into how these groups are working and learning together in a multi-professional context; comparative case studies would be particularly illuminating. Drawing from the NHS context and the Edge Hill case studies, it would appear that inclusive CPD models can encourage joint learning and foster a climate conducive to partnership. This will hopefully enable all staff to break down the barriers associated with role perception so that “the question isn’t ‘what’s your title/status?’ but ‘what value do you bring to the team’”.²⁸

References

- ¹ Armitage, S. & O’Leary, R. *A Guide for Learning Technologists*. LTSN Generic Centre e-Learning Series No 4. York: Learning Teaching Support Network, 2003: p4.
- ² Department for Education and Skills. *Towards a Unified E-learning Strategy* (draft). London: DfES, 2004: p4.
- ³ Universities and Colleges Information Systems Association (UCISA) (2003). *VLE Surveys - A Longitudinal Perspective Between March 2001 and March 2003 for Higher Education in the United Kingdom*. URL <http://www.ucisa.ac.uk/groups/tlig/vle/index_html>
- ⁴ Jenkins, M. & Hanson, J. *A Guide for Senior Managers*. LTSN Generic Centre e-Learning Series No 1. York: Learning Teaching Support Network, 2003: p11.
- ⁵ Dearing, R. *Higher Education in the Learning Society – Summary Report*, The National Committee of Inquiry into Higher Education. London: HMSO, 1997.
- ⁶ HEFCE. *Joint Funding Councils’ Libraries Review Group: Report* (The Follett Report). London: HEFCE, 1993.
- ⁷ John Fielden Consultancy. *Supporting Expansion: A Report on Human Resource Management in Academic Libraries, for the Joint Funding Councils’ Libraries Review Group* (The Fielden Report). London: HEFCE, 1993.
- ⁸ Pugh, L. Some theoretical bases of convergence. *New Review of Academic Librarianship* 1997, 3, 49-66: p50.
- ⁹ Oysten, E. (ed.) *Centred on Learning: Academic Case Studies on Learning Centre Development*. London: Ashgate, 2003.
- ¹⁰ Currier, S. (2002) *INSPIRAL: Final Report*. URL <http://www.inspiral.cdli.strath.ac.uk/>
- ¹¹ Core, J., Rothery, A. & Walton, G. *A Guide for Support Staff*. LTSN Generic Centre e-Learning Series No 5. York: Learning Teaching Support Network, 2003.
- ¹² Fisher, B. Converging on staff development. In: Oldroyd, M. (ed.) *Developing Academic Library Staff for Future Success*. London: Facet, 2004: pp61-82: p62.
- ¹³ Allen, B. *E-learning and Teaching in Library and Information Services*. London: Facet, 2002: p1

- ¹⁴ Gaston, R. The changing roles of the subject librarian, with a particular focus on UK developments, examined through a review of the literature. *New Review of Academic Librarianship* 2001, 7, 19-36.
- ¹⁵ Fletcher, J. & Stewart, D. The library: an active partner in online learning and teaching. *Australian Academic and research Libraries* 2001 32 (4), 213-21: p213.
- ¹⁶ Pinfield, S. The changing role of the subject librarian. *Journal of Library and Information Science* 2001, 33 (1), 32-38.
- ¹⁷ Moore, K. Building new partnerships: changing institutional relations. In: Oysten, E. (ed.) *Centred on Learning: Academic Case Studies on Learning Centre Development*. London: Ashgate, 2003, pp127-152.
- ¹⁸ Stoffle, C. Predicting the future: what does academic librarianship hold in store? *College and Research Libraries News* 2000, 61 (10), 894-901.
- ¹⁹ Riggs, D. E. What's in store for academic libraries?: leadership and management issues. *The Journal of Academic Librarianship* 1997, 23 (1), 3-8.
- ²⁰ Schmoller, S. *Getting Certified: The Ins and Outs of 'CMALT' – the ALT Certified Membership Scheme for Learning Technologists*. Association of Learning Technologists, 2004. URL <<http://www.alt.ac.uk>>
- ²¹ Beetham, H. *Career Development of Learning Technology Staff: Scoping Study*. JISC Committee for Awareness, Liaison and Training Programme. URL <<http://www.jisc.ac.uk>>
- ²² Oliver, M. What do learning technologists do? *Innovations in Education and Teaching International* 2002, 39 (4), 245-252.
- ²³ Bundy, A. Window of opportunity: libraries and higher education. *Library Management* 2003, 24 (8/9), 393-400.
- ²⁴ Scholes, J. & Vaughan, B. Cross-boundary working: implications for the multiprofessional team. *Journal of Clinical Nursing* 2002, 11 (3), 399-408: p401.
- ²⁵ Fowell, S. & Levy, P. Special issue on networked learner support. *Education for Information* 1999, 14 (4).
- ²⁶ Kirkpatrick, D. Who owns the curriculum?: the ethics and equity of e-learning in higher education. In: *E-learning, Ethics and Equity Conference*, Victoria University of Technology, Melbourne, 2001: p43.
- ²⁷ Roberts, S. & Davey, J. VLEs and information services: redefining distance learning and the role of information services within the virtual learning environment. In: Brophy, P., Fisher, S. & Clarke, Z. (eds.) *Libraries Without Walls 4: the Delivery of Library Services to Distant Users*. London: Facet, 2002, pp73-84.
- ²⁸ *SOLSTICE CETL bid*. [unpublished] Edge Hill College of Higher Education, 2004.
- ²⁹ McGrath, M. *Multi-disciplinary Teamwork*. Aldershot: Avebury, 1991.
- ³⁰ Black, C. & Martin, L. Supporting staff in a virtual learning environment. *SCONUL Newsletter* 2003, 30, 19-22.

THE IMPACT OF NATIONAL BOARD CERTIFICATION FOR SCHOOL LIBRARY MEDIA SPECIALISTS

Gail Dickinson

Assistant Professor

Darden School of Education

Department of Educational Curriculum and Instruction

Old Dominion University

Education Building Room 249-6

Norfolk, Virginia, USA, 23529

gdickins@odu.edu

Abstract

The National Board for Professional Teaching Standards (NBPTS) offers a unique opportunity for school library media specialists in the United States to apply for certification as a National Board Certified Teacher (NBCT). Almost 1200 school library media specialists have successfully undertaken this opportunity for workplace learning, referred to by most candidates as the best professional development experience they have ever had. The process is rigorous and voluntary, with a low passing rate for first-time attempts. This paper explains the process for school library media NBCT candidacy, and discusses some impacts the certification process has had on continuing education for U.S. school library media specialists.

Introduction

The workplace is a center of learning activity for workers in all job categories and institutions. Learning happens constantly in the workplace, with every job task acting as an opportunity for learning. Sometimes this learning is casual and trial-and-error, such as learning a more efficient way to perform a task, or learning a new source of information. At times the learning is structured, with organized continuing education opportunities such as workshops or coursework. The impetus for the learning can also vary. Structured workshops are usually planned by management for the benefit of workers, while unstructured learning opportunities can be at the discretion of the workers.

Barbara Allan notes that learning which occurs in the workplace can have more benefits than more structured activities. Firstly, it is cost-effective, since it does not usually involve travel, worker time, or tuition. Secondly, when the learning is based directly on the tasks associated with the job, there is a higher level of skill development and more retention of learned knowledge. And finally, the learning can occur at the best time for the task, for the worker, and for the institution.¹

There is evidence that workers themselves prefer workplace learning rather than formal workshops. Ritchie places workplace learning in the context of improving professional practice, and reported findings from an American Library Association (ALA) survey that found that workers spent up to three times as much time on independent self-directed workplace learning as they did in structured workshops. She notes that workplace learning requires "practical application of new knowledge and skills learned and the transfer of training back into the workplace".²

This paper explores a workplace learning opportunity for school library media specialists in the United States that combines both the structure of formalized continuing education opportunities and the flexibility and transferability of work-based learning.

The National Board for Professional Teaching Standards

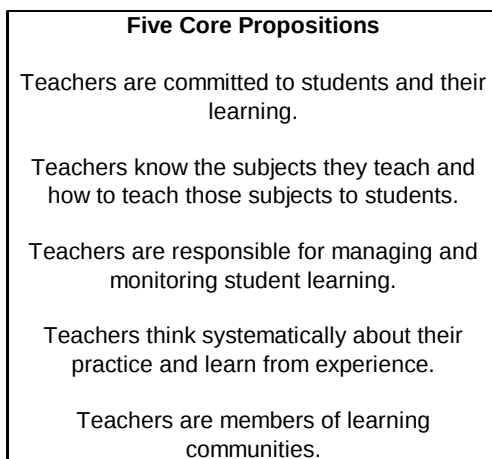
The National Board for Professional Teaching Standards (NBPTS) was conceived as a result of a national study on the recruitment and retention of teachers. The published findings called for a national board to be formed that would identify the components of good teaching, devise a process to identify the best teachers, and encourage states and school districts to reward these teachers accordingly.³ Its purpose was to encourage accomplished teachers to remain in the teaching profession, rather than to seek promotion or alternative careers that would take them away from direct contact with students.

NBPTS was formed in 1987. Its three-part objective is to “advance the quality of teaching and learning by:

- Maintaining high and rigorous standards for what accomplished teachers should know and be able to do,
- Providing a national voluntary system certifying teachers who meet these standards, and
- Advocating related education reforms to integrate National Board Certification in American education and to capitalize on the expertise of National Board Certified Teachers”.⁴

The first step in the process was to identify the elements of good teaching that would apply to teachers in all subject areas or grade levels. These *core propositions* are the basic principles underlying what teachers should know and be able to do.

Figure 1 NBPTS Five Core Propositions (www.nbpts.org)



After the five core propositions were established NBPTS formed subject-specific standards writing committees to formulate standards and assist in the development of assessment procedures for teachers in each subject area. Each standards committee was required to be composed of mostly classroom teachers currently teaching in that subject area. The process of developing the subject area standards was time-consuming and slow. NBPTS

purposefully formed only a few subject committees at a time, slowly adding certificate areas in which teachers could be certified.

NBPTS school library media

The school library media standards writing committee was formed in 1998. As with the other standards committees, over half of the committee were building-level school library media specialists. The rest of the members were a mixture of library supervisors and library educators. The committee developed ten library media standards, forming the basic building blocks of what school library media specialists know, what they do, and how they grow as professionals.

Figure 2 School library media standards (www.nbpts.org)

Library Media Standards	
<i>What Library Media Specialists Know?</i>	
Standard 1	Knowledge of Learners
Standard 2	Knowledge of Teaching and Learning
	Knowledge of Library and Information
Standard 3	Studies
<i>What Library Media Specialists Do</i>	
Standard 4	Integrating Instruction
	Leading Innovation through the Library
Standard 5	Media Program
Standard 6	Administering the Library Media Program
<i>How Library Media Specialists Grow as Professionals</i>	
Standard 7	Reflective Practice
Standard 8	Professional Growth
Standard 9	Ethics, Equity, and Diversity
	Leaderships, Advocacy, and Community
Standard 10	Partnerships

Standards 1-3 outline the knowledge foundations of the school library media field. The field of school library media is based in two professions: library science and education. These professions are compatible, but each is composed of distinct knowledge and skills. School library media specialists must acquire the knowledge base of each of these professions in order to be considered accomplished at both.

The focus on learners is an important concept in all NBPTS standards, and is also compatible with the library science profession. Librarians have always been interested in the patron as the end-user of print and electronic resources. Education, from a different perspective, considers resources as the end-use of an instructional process. Regardless, knowledge of the learner is the first step in either process.

Standards 4-6 are the instructional heart of the school library media program in the school. School library media specialists collaborate with classroom teachers to integrate

information skills instruction into classroom content. They are skilled in the use of information technology, and use technology as a tool to increase access to information resources. They encourage reading by deliberate planned instruction and events, and by selecting and organizing the library collection so as to have resources for the use of students and teachers. In addition, school library media specialists organize and manage the library program to maximize access to materials and services.

Standards 7-10 reflect the library as a learning community. The interconnection of all types of libraries and the professional attributes of continual learning make this set of standards especially appropriate for school library media specialists. The concept of ethical access that meets the diverse needs of users is a basic premise underlying the library field. Creating partnerships to advocate for strong library services is something that all librarians do.

The NBPTS Library Media Standards are based on the foundational aspects of the school library media field. Accomplished school library media specialist know the content outlined in standards 1-3, implement the concepts outlined in Standards 4-6, and create a personal learning environment in the library as outlined in Standards 7-10. Becoming certified by the NBPTS requires more, however, than just proving awareness of the standards.

The NBPTS process

Along with identifying the standards belonging to a level of excellence for school library media specialists, NBPTS also devised a process that could reflect both content knowledge and performance-based elements of teachers. The structure of the process is roughly the same regardless of the teaching specialties. Candidates for national board certification complete four portfolio entries. The first three are specific to the teaching specialty and require samples of student work, videotaped instruction, and written commentary. The fourth portfolio entry is the same across teaching specialties, and requires candidates to provide evidence that shows that professional accomplishments have benefited student learning in the school.

The written commentary is a critical element of the portfolio process. The reflective writing cycle, consisting of describing the instructional context and the instructional sequence of the lesson, analyzing the results of the instruction, and reflecting on the instructional process in the context of the school setting, is key to providing what NBPTS refers to a “clear, consistent, and convincing evidence” that the candidate has met the standards.

Candidates report that the portfolio process requires about 200-400 hours of work, and must be completed within the span of a few months. For school library media, the portfolio entries are the following:

- **Entry One: Instructional Collaboration**
Candidates must co-plan, co-teach, and co-assess an information skills unit with a classroom teacher. Candidates are required to send 10 pages of written commentary describing, analyzing, and reflecting on the instruction, work samples from two students, and documentation of the collaborative planning process.
- **Entry Two: Literature Appreciation**
Candidates must demonstrate that they have organized the library media center and services to encourage reading and the use of literature in all formats, and teach a lesson demonstrating how they encourage students to interpret the literature they read. Candidate must send a 2-minute narrated videotaped pan of the library and a 15-minute unedited segment of a single lesson. The

required written elements are twelve pages of written commentary and up to four pages of instructional materials used in the lesson.

- **Entry Three: Integration of Technology**
Candidates must demonstrate that they can integrate technology into an instructional lesson. The lesson must be based on classroom content, and must include elements designed to teach ethical and legal uses of information. Candidates must send two 10-minute segments of a single lesson, designed to show growth in student understanding, and 10 pages of written commentary. Up to four pages of instructional materials used in the lesson can also be included.
- **Entry Four: Documented Accomplishments**
Candidates must demonstrate that professional work outside of the instructional setting; with colleagues, professional associations, professional development activities, and work with families has had an impact on student learning. Candidates may review eight accomplishments centered in three main categories: as a partner with students' families, as a learner, and as a leader/collaborator.

After the portfolio entries are completed, candidates sit for 6 assessment center exercises. For each exercise, candidates are presented with a scenario and a question, and have 30 minutes to write an answer. The six assessment centre exercises for school library media are:

- organisational management,
- ethical and legal tenets,
- technologies,
- collection development,
- information literacy,
- knowledge of literature.

Each of the 10 assessments described above are assessed by building-level school library media specialists trained by NBPTS. Figure 3 below shows the weighted percentage of NBPTS assessments.

Figure 3 NBPTS weighted percentage

Library Media Scoring Weights	
	Weight (%)
<i>Portfolio</i>	
Entry One: Instructional Collaboration	16
Entry Two: Fostering an Appreciation of Literature	16
Entry Three: Integration of Instructional Technology	16
Entry Four: Documented Accomplishments: Contributions to Student Learning	12
<i>Assessment Center</i>	
Organizational Management	6.67
Legal and Ethical Issues	6.67
Technologies	6.67
Collection Development	6.67
Information Literacy	6.67
Knowledge of Literature	6.67
	100.02

Developed from the NBPTS Scoring Guide. (www.nbpts.org)

Each entry is scored on a 1.0 – 4.0 scale. Candidates must average 2.75 to achieve the status of National Board Certified Teacher. Candidates failing to achieve the 2.75 average can choose to bank high-scoring pieces of the portfolio or assessment center entries, and retake low-scoring sections. Candidates may retake low-scoring sections up to two times within a 24-month period following the initial attempt. For this reason, attempting NBPTS certification is sometimes referred to as a three-year process, even though the actual process of preparing the portfolio entries and taking the assessment center exercises spans only a few months.

Cost-benefit analysis

National Board Certification has the potential to be the one of the best examples of workplace learning. Firstly, the NBPTS process is voluntary; participants choose whether or not they wish to seek National Board certification. There is no penalty in the workplace for making the decision not to apply. It is not a requirement for hire in any school district, nor is it currently a part of any advanced degree program.

Secondly, the NBPTS process is rigorous. The passing rate is approximately 49 % for candidates attempting to achieve the requisite score on their first try. Participants who are successful report that it was the best professional development experience that they have had, confirming the perception that the rigour of the process equals the perceived value.

And thirdly, the rewards for becoming a National Board Certified Teacher are both internal and external. NBCTs are a fraternity of accomplished teachers. Success in completing the rigor of the process is a mark of respect in the education and library science professions, and many teachers are proud to place the letters NBCT after their signature. Some financial rewards also exist for some NBCTs, either as a salary increase or as a cash bonus. This reward

is dependent on the salary schedule of the state or school district, and varies from several hundred to several thousand U.S. dollars.

There is an emotional cost in attempting NBPTS certification. The 49% passing rate ensures that many candidates each year will fail to achieve NBPTS certification. The process is public, requiring school and parental permissions for videotaping. Parents, school colleagues, and administrators are aware of the certification attempt and the emotional toll of the process. It is rare in public service that librarians or teachers attempt a task with such a high emotional cost and such a high risk of failure.

The financial cost is high as well. The cost will rise in spring 2005 to US\$2500 from US\$2300 in 2004. Retaking low-scoring sections is an additional cost, currently US\$350 per section.

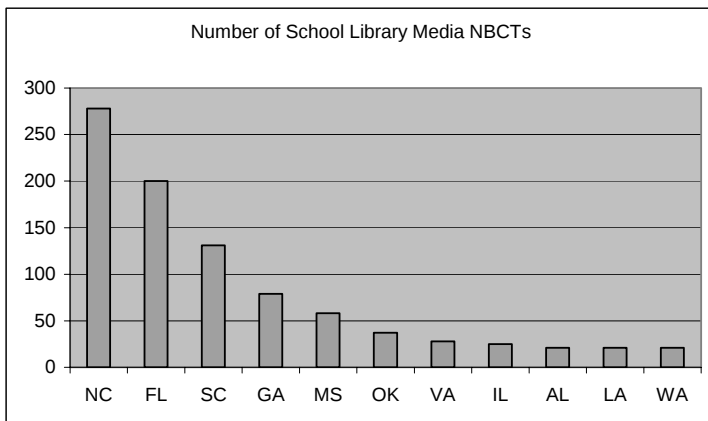
The benefits of the NBPTS certification process are acknowledged even by critics of the process.⁵ Most candidates, whether achieving NBCT status or not, praise the effect that the learning process had on their teaching and the resulting impact on students. The rigour of the process and the deep level of learning required ensure that achieving board certification is a change process.

The financial benefits of achieving NBPTS certification are mixed. Education in the United States is delegated to the authority of the individual states. States differ in the organization and management of school districts. States with a high degree of control over schools and teachers, such as the state of North Carolina, have chosen to reward teachers for achieving NBPTS certification. North Carolina reimburses the \$2300 application fee for all candidates who complete the application process, and awards a 12% salary increase for the life of the certificate (10 years) providing that the teacher remains in direct contact with students. Other states have rewarded NBCTs with cash bonuses or one-time awards upon receiving certification.

Still other states, particularly those with teacher unions, have found it more difficult to provide rewards for NBPTS certification. Paying teachers more if they are NBCTs is basically merit pay, something that some teacher unions have staunchly resisted. In these states, depending on the teacher union contract in the individual school districts, there is still some financial support for candidacy or rewards for achieving NBCT status.

Figure 4 below indicates the strength of financial incentives for NBPTS candidacy. The list of NBCTs by state clearly shows that rewarding teachers who achieve NBCT status has an impact on the number of teachers who complete certification. North Carolina (NC), Florida (FL), South Carolina (SC) and Georgia (GA) all provide some type of incentive, which has had an impact on the number of NBCT school library media specialists in that state. The total number of school library media specialists in each state is not a factor. The list of the states with the most school library media NBCTs rank in the number of school library media specialists from 3rd to 27th.

Figure 4 Top-ranked NBCT states



Developed by the author with data from the NBCT directory, www.nbpts.org.

Other school library media impacts

Financial benefits are not the only incentive that may have encouraged NBCT candidacy. In states with a high number of NBCTs, the NBPTS process has impacted on other forms of continuing education. Workshops on achieving board certification abound at professional association conferences in these states, usually taught by those who have achieved certification. Colleagues attempting certification create informal networks for peer coaching and emotional support. In states with few school library media NBCTs, candidates have little face-to-face contact with other NBCTs. The decision to attempt certification is very personal, and may be made without a thorough understanding of the process.

Nationally, candidate support networks have been developed, both formally and informally, to assist candidates in the process. Discussion lists, one of which has several thousand members, exist as a support mechanism for candidates attempting the process. Successful candidates tend to remain active members of the discussion lists to answer general questions about the process and for the encouragement of those candidates who were not successful at their first attempt.

Presentations at national conferences are another way that candidates have shared experiences and encouraged other school library media specialists to attempt the process. Successful candidates tell of their experiences and promote the process as one in which the intangible benefits are worth the time, expense, and risk of failure.

There is little indication that school library media preparation programs in the United States have implemented continuing education programs based on the NBPTS process. A review of the web pages of the top ranked programs accredited by the ALA revealed no hits when a search for 'NBPTS' was undertaken.

Shannon's recent research on the school library media preparation programs provides some interesting context. It was evident from her survey of ALA-accredited programs that school library media may not be a focus of the professoriate in many library schools. Some preparation programs indicated that no one on their full-time faculty was considered school library media, yet the number of school library media students was a large percentage of the total student body.⁶ The presence of a largely adjunct professoriate in school library media

preparation, although maintaining closer ties to practice, does little to influence tenured and tenure-track faculty on matters of curriculum or policy.

Continuing education has not necessarily been a strong point with U.S. ALA-accredited library schools. Ann O'Neill reported in 1998 that only 30 percent of library schools reported providing any continuing education programs.⁷ In recent years, only one school library media program, the University of North Carolina at Greensboro, conducted NBPTS workshops geared for school library media.

Conclusion

The NBPTS process has been available to school library media specialists for three years. In some states, such as Florida, South Carolina, and North Carolina, school library media specialists were aware of the process and had watched classroom teachers in other teaching specialties attempt and receive NBCT designation for some years. The financial rewards that these NBCTs received were undoubtedly an incentive. When school library media became an eligible certification area, school library media specialists in those states were prepared for the rigor of the process and had a high degree of success. In other states, the impact of the NBPTS process has been slow to develop. Six states out of the fifty United States still have no school library media NBCTs after three years of the process, and half of the fifty states have fewer than five school library media NBCTs.

Human resources director Jill Keally attributed the success of the University of Tennessee's workplace learning program for support staff to four factors. She noted that as a result of the institutionalization of the program, the institution was able to provide a sizable salary reward to program completers, to motivate staff to engage in continuing education activities, to create workers who would view their job as a career, and to place a high value on learning in the workplace.⁸

Seen through that lens, NBPTS has provided similar outcomes. It has created high standards for school library media specialists and created a process by which school library media specialists reaching those high standards could be identified. An increasing number of states and school districts are rewarding NBCTs financially, and providing incentives for candidates to enter the process. The intrinsic value of the NBCT certification for career school library media specialists is unequalled, and more and more states and school districts are providing extrinsic rewards as well.

Varlejs asks an important and unanswered question about continuing education for librarians, "Do they become more knowledgeable and skilled, and does this learning contribute to the improvement of the library and information service that they subsequently provide to their clientele?"⁹ There is some indication that the NBPTS certification process does make a difference. Some studies have found that there is a higher level of student achievement in classrooms with NBCTs than those in which NBCT status was attempted but failed.¹⁰ There is, however, no research currently available on the effect of school library media NBCT status on student achievement. As a result very little is known about the almost 1200 school library media specialists who have achieved NBPTS status thus far. We are not able to make conclusions about preparation, program effects, or administrative support that leads to the designation of NBCT for school library media. Although there is some research available to indicate that students in classrooms with teachers who have acquired National Board certification have a higher level of achievement as indicated on test scores than students in classrooms with teachers who attempted the process but did not achieve certification, we do not know if that is true for school library media.

It can justifiably be claimed, however, that NBPTS has achieved the intention of workplace learning at its highest level. It is a rigorous and voluntary process to improve skills, improve services to users, and achieve a high level of professional growth.

References

- ¹ Allan, B. *Developing Library Staff Through Work-based Learning*. Lanham: Scarecrow, 2003: p5.
- ² Ritchie, A. Continuing professional development and workplace learning: IFLA's contribution. *Library Management* 2002, 23 (8/9), 442-443.
- ³ Carnegie Task Force on the Profession of Teaching. *A Nation Prepared: Teachers for the 21st Century*. Washington: Carnegie Forum on Education and the Economy, 1986.
- ⁴ National Board for Professional Teaching Standards. About NBPTS. URL <<http://www.nbpts.org/about/index.cfm>>
- ⁵ Ballou, D. Certifying accomplished teachers: A critical look at the National Board for Professional Teaching Standards. *Peabody Journal of Education* 2003, 78 (4), 201-219.
- ⁶ Shannon, D. Preparation of school library media specialists in the United States. *School Library Media Research* 2004, 7. URL <<http://www.ala.org/ala/aasl/aaslpubsandjournals/slmrb/slmrcontents/volume72004/shannon.htm>>
- ⁷ O'Neill, A.L. What's for dinner?: continuing education after the MLIS. *Library Acquisitions: Practice & Theory* 1998, 22 (1), 35-40.
- ⁸ Johnson, K. (ed.) University of Tennessee Libraries career employee program: a case study from the serials perspective. *Serials Review* 2004, 30 (1), 42-50.
- ⁹ Varlejs, J. The ALISE statistics on continuing education: what the numbers don't tell us. *Journal of Education for Library and Information Science* 2004, 45 (3), 252.
- ¹⁰ Vandervoort, L.G., Beardsley, A.A., & Berliner, D.C. National Board certified teachers and their students' achievement. *Education Policy Analysis Archives* 2004, 12, (46). URL <<http://epaa.asu.edu/epaa/v12n46/>>

EVALUATING EFFECTIVENESS OF CPD AND MEASURING RETURNS ON INVESTMENTS: A CASE STUDY OF UGC REFRESHER COURSES (INDIA)

Professor Sudhir Kumar

Reader & Head, S.S. in Library & Information Science,
Vikram University, Ujjain (Madhya Pradesh) India 456010
skumarram2000@yahoo.co.in

Dr Leena Shah

Librarian,
Government College Mehidpur Distt.
Ujjain (Madhya Pradesh), India 456443.
leenataksali@yahoo.co.in

Abstract

The purpose of this paper is to measure the effectiveness of continuing professional development (CPD) held on a regular basis. The paper provides a brief history of CPD in India. It considers the role of the University Grants Commission in CPD via the Career Advancement Scheme for academic librarians. The effectiveness of CPD is measured through a survey of attendees at four refresher courses held at the School of Studies in Library and Information Science, Vikram University, Ujjain, and the return on investments made in these courses is assessed. It is concluded that at present CPD is not as effective as desired and needs modification to meet the needs of the new technological environment. The paper also suggests that there is a need for CPD for public and school librarians in India.

Introduction

Continuing Professional Development (CPD) is a process of personal growth to improve the capability and realize the full potential of professionals. This can be achieved by obtaining and developing a wide range of knowledge, skills and experience, which are not normally acquired during initial training and routine work, and which develop and maintain competence to practice. CPD includes those activities by librarians to upgrade their knowledge, abilities, competences and understanding in their field of work so they can become more effective professionals. CPD includes all learning activities undertaken after initial qualifications, whether they take place on the job or are provided outside it by agencies such as library schools.

Continuing Professional Education (CPE) is one means of Continuous Professional Development. CPE is a life long process through which individuals update the knowledge, skills and attitudes acquired during their education. It is usually self-initiated learning in which individuals assume responsibility for their own development. CPE is not an end itself but as a means to an end. CPE is crucial to those professionals who have had the benefit of a qualifying education but need to acquire new knowledge.

There are a number of reasons why one would undertake CPD. These include:

- the desire to develop professional knowledge and skills,
- a condition placed on membership of a professional body,
- a condition placed on promotion in employment,
- to demonstrate professional standing to clients and employers.

Whichever reason may apply, there is a growing imperative placed upon all practitioners to maintain professional competence through a systematic process of CPD. New technology; new methods of working; legislative changes; the emergence of new industries, and even new professions, demand the need for constant updating of knowledge and skills in order to maintain professional competence.

The objectives of the CPD Programs are:

- to update knowledge and skills relevant to the needs of the workforce,
- to provide learning opportunities in support of mid-career change,
- to maximise participation by providing learning opportunities in a flexible manner.

Library and Information Science education in India

Library education in India is approximately a century old. W. A. Borden, a pupil of Melvil Dewey, was called by the ruler of the princely state of Baroda (now merged with the western state of Gujarat) to organize a library system. In 1911 he started training in Library and Information Science (LIS) to provide the required manpower.

The first university level course in LIS in India came in 1915 when Asha Don Dickinson, another pupil of Dewey, started a course of 3 months duration at Lahore University (now in Pakistan). These courses can be considered to be CPE or CPD programs since at that time most Indian librarians were not formally trained in librarianship.

Another landmark in CPE in Indian librarianship was reached in 1920 when the state of Andhra Pradesh opened libraries and reading rooms and commenced short-term training classes at Vijayawada. Similar courses were also initiated at Bangalore (Karnataka - formerly Mysore state). In 1928 the Madras Library Association started three-month evening summer school programs for librarians and I/C teachers.

In 1924 Dr. Ranganathan, a Professor of Mathematics, was appointed Librarian of Madras University and was sent to the School of Librarianship at University College, London, for formal training. He was later called the 'father of library science' in India due to his life long devotion to the profession. Ranganathan took over the course run by the Madras Library Association, and it became India's first full time university course. Most of the students who initially attended the course were working librarians without formal training. Soon after Andhra University, Hyderabad; the Imperial Library Calcutta, (1925) and the Bengal Library Association, Calcutta (1935) also started formal training classes. The Dewey College, Lahore also commenced training in librarianship during this period. All these courses were, in a way, examples of CPD as they were primarily offered to working library professionals. The first university degree level course was offered by the University of Delhi in 1948. The University of Delhi also started a PhD in LIS at the same time, and a MPhil in 1980. The Indian government established the Institute for Continuing Education for Library Science at the University of Delhi but it ceased functioning in 1964.

We can conclude that in India formal training in LIS started as CPE/CPD because at that time most librarians commenced working in the profession and then took formal training. India currently has 291 universities and there are also approximately 12,342 colleges. In all, more than 100 institutions have LIS courses.¹ Twelve States have enacted Public Libraries Acts in support of a network of public libraries, and another 13 states have public libraries in the absence of specifically enabling legislation.

The present paper examines CPD in higher education through orientation and refresher courses conducted as part of the Career Advancement Scheme (CAS) provided by the University Grants Commission (UGC) support the teachers and librarians in Indian

universities and colleges. These are currently the only organized CPD programs available for librarians in India.

University Grants Commission refresher courses

The UGC is an apex agency in the field of higher education in India. It was established in 1953, six years after the country achieved independence. The UGC is responsible for the maintenance of standards in higher education and providing grants to the universities and colleges. The UGC planning and implementation are undertaken in concert with the nation's five yearly planning cycle. During the VIIIth Plan (1992-93/1996-99) one of the thrust areas for the UGC was adult, continuing and distance education. In the IXth plan (1997-98/2001-02), one of the thrust areas was orientation of teachers. In the Xth Plan (2002-03 – 2006/07) the focus was on the creation of information flow networks in higher education. It is from these various planning emphases that the LIS profession and associated CPD derive their impetus.

In 1986 the UGC introduced the CAS which has made it compulsory for university teachers – including academic librarians - to attend an orientation course and three refresher courses in order to gain promotion up to Reader (Associate Professor). Each promotion has been linked with CPD activities, both formal and informal. Under the CAS in order to achieve the senior scale, 6 years service (4 years for PhD graduates and 5 years for MPhil graduates) is required, with one general orientation course and one refresher course in the discipline or allied subjects of approved duration (minimum 21 days). Alternatively, an appropriate alternative CPD program of comparable quality (as specified or approved by the UGC) may be substituted. PhD graduates may be exempted from one refresher course. For advancement to the level of selection grade/readers, 5 years service after placement in the senior scale and participation in two refresher courses/summer institutes of approved duration (minimum 21 days), or completion of other appropriate CPE programs of comparable quality as approved by the UGC has been made compulsory. For promotion to Professor under the CAS requires a minimum of five high quality research publications, of which two may be books.

The participation in orientation courses and refresher courses is mandatory in order to gain promotion. If, however, the requisite courses have not been completed promotion would not be held up, but these courses must then be completed within a stipulated time. Senior teachers such as Readers (Associate Professors), Lecturers and Professors may opt to attend two seminars or conferences in the relevant subject area and present appropriate papers to support their promotion to higher level, or attend appropriate Refresher Courses to be offered by Academic Staff College. To date, however, no high level refresher courses have been conducted.

The CAS for librarians no longer applied after a 1998 UGC report on revision of grades was adopted for teachers. The CAS is now available only to teachers, with the super time scale 14940- grade only available to teachers and no longer available to other officers including librarians. This distinction is very discouraging to library professionals, although it is hoped that recent High Court directives have resolved this situation.²

Refresher Course Centres and Vikram University, Ujjain

Many Academic Staff Colleges are set up to plan, organise, implement, monitor and evaluate orientation courses and refresher courses offered in various subjects to newly appointed college and university teachers. The UGC permits a number of university departments to offer 'Refresher Courses' in order to meet the demand from applicants. The UGC sponsor these courses, including the cost of boarding & lodging, lectures, contingency

expenditure and TA, DA of participants and resource persons. Places are allocated to the departments based on their infrastructure and the reputation of the university in the relevant subject. The approved departments are called Refresher Course Centres (RCC).

Vikram University, Ujjain does not have an Academic Staff College (ASC) but is a recognized RCC and has been sanctioned to offer refresher courses in a number of subjects. The Department of Library and Information Science has been permitted to offer refresher courses since 2001. The Department conducted its initial refresher course in September 2001. A second course was held in November 2002, a third in January 2003, and a fourth in January 2004. A fifth course is planned for January 2005.

Participants in the LIS refresher courses receive three lectures per day, and practical computing sessions are organized with the help of the Institute of Computer Science. With assistance from other departments of the university, a mini bus is available to take participants to various departments on the widespread campus and to visit various libraries in and around the city of Ujjain and the nearby city of Indore. Visits to a number of religious and historical sites are also included in the program. Each participant must submit seminar papers and lecture summaries and take part in quizzes and debates. Weekly tests are conducted to assess participants' progress.

Participants in the refresher courses

In the first refresher course 35 participants were admitted. There were 30 in the second refresher, 21 in the third and 38 in the fourth. Of the total of 124 participants 23 (18.55%) have been female. Participants at each of the courses were surveyed on the experience and their responses are provided below.

The Vikram University is situated in the state of Madhya Pradesh, and 66.13% of participants were from this state. Of the remainder, 15.32% of participants were from the sister state (bifurcated in 2002) of Chattisgarh, and a further 8.87% were from the adjacent state of Rajasthan. Of the balance, 9.68% of participants came from academic institutions of the states of Maharashtra, Gujarat, Uttar Pradesh, Bihar, Uttaranchal and Himachal Pradesh.

Salary/Grade of participants

The participants were working in various types of libraries. Seventeen (13.70%) were faculty members (teachers in LIS) from various universities; 98 (79.03%) were from college libraries, and 9 (7.26%) were from special libraries.

The refresher courses are open only to library professionals working under UGC approved grades of Rs8000-13,500 (initial scale) and 10,000 -15,200 (senior scale). It is also open to librarians in the selection grade of Rs12,000 -18,200, but only in cases where the grade has been already been given and the refresher course must be completed within a stipulated period. The refresher course scheme does not apply to staff working in the lower grades of the lecturer scale, or to staff working in school and public libraries.

In the four refresher courses 81 (65.30%) participants were appointed at the initial scale; 26 (20.97%) in the senior scale, and 17 (13.71%) in the selection grade. It is clear that most of the participants are working in the initial stage of their jobs and grades, and CPD will potentially be of great benefit to them. The first refresher course had a higher percentage of senior librarians as they were under pressure to complete the course and qualify for the selection grade.

Refresher courses attended: -**Table 1 Number of refresher courses previously attended**

Number of courses previously attended	Refresher Course				Total
	1st	2nd	3rd	4th	(%)
One	11(31.43)	15(50.00)	6 (28.57)	15 (39.47)	47 (37.90)
Two	5 (14.29)	5 (16.67)	6 (28.57)	16 (42.11)	32 (25.80)
Three	1 (2.86)	-	2 (9.53)	4 (10.53)	7 (5.65)
Nil	18 (51.42)	10(33.33)	7 (33.33)	3 (7.89)	38 (30.65)
Total	35 (100%)	30 (100%)	21 (100%)	38 (100%)	124 (100%)

Many of the participants have attended previous refresher courses. In all 47 (37.90%) participants had previously attended one refresher course; 32 (25.80%) have attended two courses and 7 (5.65%) participants have attended 3 courses. 38 (30.65%) participants had not attended any other refresher courses. 63 (50.81%) participants have attended one previous orientation course, but 61(49.19%) participants had not attended any orientation courses. An orientation course can be substituted by a refresher course due to non-availability of places in orientation courses in Academic Staff Colleges.

Previous experience**Table 2 Duration of Experience**

Experience (in years)	Refresher Course				Total (%)
	1st	2nd	3rd	4th	
Up to 8	9 (25.71)	9(30.00)	5 (23.81)	5 (13.16)	28 (22.58)
9-12	7 (20.00)	2 (06.67)	3 (14.29)	11(28.95)	23 (18.55)
13-16	4 (11.44)	8 (26.66)	3 (14.29)	4 (10.53)	19 (15.30)
17-20	6 (17.14)	5 (16.67)	3 (14.28)	9 (23.68)	23 (18.55)
21-above	9 (25.71)	6 (20.00)	7 (33.33)	9 (23.68)	31 (25.00)
Total	35 (100%)	30 (100%)	21 (100%)	38 (100%)	124 (100%)

Of those attending the refresher courses 28 (22.58%) have 8 years or less experience; 23 (18.55%) have 9 -12 years experience and 19 (15.30%) have 13-16 years experience. In addition 23 (18.55%) have 17-20 years experience, and 31 (25.00 %) have more than 21 years experience in the profession. This high degree of experience reflected in these figures is due to the late implementation of the CAS in India.

Previous qualifications

As per UGC approved qualifications (college librarians/university assistant librarians), the qualifications of attendees were either graduate + M.L.S.; or post-graduate + B.L.S. Both B.L.S. and M.L.S. are one-year degrees. But many of those who attended were postgraduate + M.L.S. 82% of participants have completed their qualifications (either undergraduate or postgraduate) through faculties of Arts. There were few participants qualified through commerce or science faculties. Only 21% have a PhD in LIS, a degree that was introduced only recently in India.

104 (83.87%) participants are M.L.I.S. or M.L.S.; 20 (16.13%) are B.L.S.; 41 (32.56%) are graduate only (B.A., B.Com. or B.Sc.); while 83 (66.92%) are M.A., M.Com. M.H.Sc. or M.Sc.; and 26 (20.96%) are Ph.D. in Lib.Sc. while 2 (01.61%) hold a Ph.D. in other subjects. It is clear that most of the participants have done M.L.I.S. either at the time of entry or have taken the degree in service.

Evaluation of refresher courses

A questionnaire was administered to each participant at the completion of the refresher course to evaluate its impact on the participants. Responses of individuals are presented and discussed in this section. Respondents were not required to identify themselves to encourage frank responses.

The various facilities used for the courses were evaluated on a 4 point scale; not good, just good, good and very good. A 'score' was calculated on the basis of 3 marks are assigned for very good; 2 for good; 1 for just good and zero for not good.

On the basis of the participants' evaluation, a percentages score has been calculated for each of the course content and facilities provided during the four refresher courses. These percentages are shown in table 3.

Table 3 Responses (%) to four refresher courses

Overall Contents Maximum Each	1st 735 n=35	2nd 630 n=30	3rd 441 n=21	4th 798 n=38	Total 3604 n=124
Boarding	67.6	82.2	81.0	77.19	76.34
Lodging	70.5	83.3	87.3	76.3	78.22
Transport facility	85.7	84.4	90.5	84.21	85.72
Lectures	66.7	78.9	85.7	85.08	78.49
Computer practicals	73.3	81.1	90.5	86.84	82.26
Library visit	69.5	84.4	92.1	88.59	82.76
Sight scene	73.3	86.7	93.6	92.1	86.02
Total Scores	72.4	82.1	88.6	84.46	81.41

It is clear from the table that the level of satisfaction of the participants in LIS refresher courses at Ujjain is consistently high. From the results it can be seen that the overall score is 81.41 for the four refresher courses and for all the activities. Lectures, computer practicals and library visits, all integral parts of the program scored highly, particularly in each of the last three courses.

It can also be seen that the level of satisfaction has been highest in the third refresher course, and a little down in the fourth. This is likely to have been due to the non-availability of some facilities for this course. It is useful to remember that the participants have attended refresher courses at a number of other institutions, and are therefore well placed to make the necessary comparisons.

Participants were also asked, 'Will you join another refresher course at Ujjain, if given a chance?' Only four responded that they would not, a further indication that satisfaction with the program at Ujjain is very high. Almost all the participants were very much satisfied with the physical environment provided during the refresher course and the CPD activities in the form of lectures, computer practical and library visits.

Effectiveness of refresher courses

Another question was asked, 'Do you feel the course has really refreshed your knowledge?' 66.12% answered very much, and 33.88% answered yes. All participants therefore believed that refresher course had value.

Table 4 Effectiveness of refresher courses

Refresher Course	Very much	Yes	No	Total
1st	21 (60.00)	14 (40.00)	-	35 (100)
2nd	20 (66.67)	10(33.33)	-	30 (100)
3rd	16 (76.19)	5 (23.81)	-	21 (100)
4th	25 (65.79)	13 (34.21)	-	38 (100)
Total	82 (66.12%)	42(33.88%)	-	124 (100%)

Alternative to refresher courses: -

Participants were also asked, 'What should be done in lieu of refresher courses?' 43 (34.67%) preferred attendance at national level conferences; 21 (16.94%) preferred paper presentation in conferences; 9 (7.26%) suggested the publication of books, and 51 (41.13%) answered that there is no alternative and that refresher courses cannot be replaced by other methods of CPD.

Return on investment

Return is a very important aspect of any investment. The UGC has spent a substantial amount in establishing the various Academic Staff Colleges to conduct refresher courses. To cope with the growing need for such courses, many Refresher Courses Centers have been established. In this study, the cost of the building and establishing of Academic Staff Colleges is not taken into consideration. A cost benefit analysis has been undertaken on the basis of actual amount spent in organizing each refresher course and the level of satisfaction of participants.

For the purpose of the cost benefit analysis, the cost of travelling allowances paid to participants and resource persons varies. As indicated, except for 14 (11.29%), participants have chosen to attend a Refresher Course in a nearby RCC or ASC. This figure is likely to be representative of other courses in India, where there are also restrictions on inviting resource persons from distant places.

The major variable is the number of participants in each course, which in turn affects the expense per head. If participation is too low, the per head expenses will be high due to the fix amount of expenditure on lectures and related costs. Recently the UGC has decided to approve a Refresher Course only where there are a minimum of 40 registered applicants, with a course fee Rs500 (€08.33). Previously it was necessary to have 30 participants but often this number was not reached. In the case of courses held at Vikram University the lowest number of participants was 21, with an average of 31 participants.

Expenditure

There is a great difference in the amount spent on the first refresher course and later courses, as the UGC grant was increased due to inflation. Lecture rates were increased from Rs200 (€3.33) to Rs300 (€4.99), and coordinators fees have been increased from Rs1200 (€19.98) to Rs2000 (€33.31) per course. Contingency has been increased from Rs20,000 (€333.06) to Rs40,000 (€66.61) per course during this period, and the reading kit cost

increased from Rs200 (€3.33) to Rs300 (€4.99) per participant. Similarly boarding and lodging expenses increased from Rs100 (€1.60) to Rs150 (€2.50) per day for participants in B class cities. Rates for local candidates are low, as they are paid only Rs50 (€0.83) per day. TA /DA of participants and resource persons too has also increased during the same period.

Table 5 Total expenditure on each course

Particulars	1st n=35	2nd n=30	3rd n=21	4th n=38	Total n=124
Lectures 4 lectures p.d.	11400 (8.00)	21600 (10.45)	21600 (10.96)	21600 (10.96)	76200 (9.53)
Coordinators Fees (fixed)	1200 (0.84)	2000 (0.90)	2000 (1.01)	2000 (0.81)	7200 (0.90)
Contingency (fixed)	20000 (14.04)	40000 (18.67)	40000 (20.31)	40,000 (16.32)	140000 (17.52)
Reading Kit (per participant)	7000 (4.91)	9000 (4.19)	6300 (3.20)	11400 (4.65)	33700 4.22)
Board. & Lodg. (per participant)	69825 (49.02)	88200 (41.00)	66150 (33.58)	113400 (46.20)	337575 (42.20)
Traveling /Daily Allowances (actual)	33009 (23.17)	53953 (25.12)	60930 (30.93)	56650 (23.11)	204542 (25.59)
Total	142434 (100%)	214753 (100%)	196980 (100%)	245050 (100%)	799217 (100%)

All figures in Indian Rupees. Figures in brackets are percentages

1 Euro = Rs 60.05

1 USD = Rs 45.20

(as on 15.12.2004)

It is apparent from Table 5 that approximately 10% of the total is spent on 4 lectures a day for 18 days. Boarding and lodging expenditure are 42% and TA/DA costs 26% of the total cost. Contingencies amount to 18%. Reading material costs 4% and coordinators remuneration is only 1%.

Cost per candidate

Per participant expenditure is presented in Table 6. It comes to Rs6500 (€107.33) per participants on an average for 21 days program inclusive of TA, boarding, lodging, computer practicals and lectures. It also includes contingency expenditures and the supply of reading materials. After inflation the average will be about Rs7000 (€117) per candidate. This does not include any rent, electricity and water expenses. Per participants cost for lectures is about Rs615 (€10.20). This includes fees for computer practicals, though no rent is paid for laboratory, system and electricity costs. Contingency is about Rs1130 (€18.82) per participants. Cost of reading kit supplied to students is Rs300 (€50.00). Boarding and lodging costs Rs2722.38 (€45.33) per participant for 21 days. TA/DA of participants and resource persons costs Rs1650 (€25.48) per participant.

Table 6 Expenditure per participant (in Rupees and Euro)

Particulars	1st n=35	2nd n=30	3rd n=21	4th n=38	Total n=124
72 lectures	325.71	720.00	1028.57	568.42	614.52
4lectures p.d.	£ 5.42	£ 11.99	£ 17.13	£ 9.46	£ 10.23
Coordinators	34.28	66.67	95.24	052.63	58.06
Fees	£ 0.57	£ 1.10	£ 1.58	£ 0.88	£ 0.97
Contingency	571.42	1333.33	1904.76	1052.63	1129.03
	£ 09.52	£ 22.20	£ 31.72	£ 17.53	£ 18.80
Reading Kit	200.00	300.00	300.00	300.00	271.78
	£ 3.33	£ 4.99	£ 4.99	£ 4.99	£ 4.52
Boarding & Lodging	1995.00	2940.00	5400.00	2984.21	2722.38
	£33.22	£ 48.96	£ 89.92	£ 49.69	£ 45.33
TA/DA	943.11	1798.43	2901.43	1490.79	1649.53
	£ 15.70	£ 29.95	£ 48.32	£ 24.82	£ 27.47
Total	4069.54	7158.43	9380	6448.69	6445.30
	£ 67.77	£ 119.21	£ 156.20	£ 107.39	£ 107.33

1 Euro = Rs 60.05

1 USD = Rs 45.20

(as on 15.12.2004)

Benefits

The return on investment can be measured in a number of ways, although an accurate assessment can only really be made in terms of participants' lifelong achievements in their day-to-day job and their contribution to the profession. A more immediate assessment can, however, be made in terms of satisfaction immediately after the course.

The survey results indicate a high degree of satisfaction with each unit program. Moreover, the participants feel that they are genuinely 'refreshed', with 66% reporting that they felt 'very much' refreshed by the experience. No participants reported that the course induced no feeling of refreshment. At the same time 47.58% participants are of the opinion that there is no alternative to refresher courses.

Benefits also accrue in other ways. For example, many participants in refresher courses were motivated by the experience to join the Indian Library Association (ILA) in order to receive the ILA Bulletin and continue their professional learning. So far more than 50 participants have taken life membership of ILA during the refresher courses.

It is also apparent that the motivation induced by attending refresher courses has led to other forms of professional development and involvement. Some attendees have purchased a home computer as a result, others have started attending conferences, and several have commenced contributing papers to journals and conference proceedings.

Conclusion and suggestions

The refresher courses are very useful as a means of CPD, and their benefits are difficult to achieve by other methods. Other forms of CPD might be effective, but measuring their outcomes is difficult. Participation in Short-term courses may be useful, for example, but they are usually limited to a specific field designed for specialists. The high cost of such courses and lack of sponsorship by employers makes these courses less useful than refresher courses. Paper presentation and attendance at conferences and seminars are also potentially useful forms of CPD, but again the lack of sponsoring of LIS professionals by their employers is a problem. In higher education UGC has linked CPD with the Career Advancement Scheme, and it has become compulsory for the employers to sponsor the LIS professionals to such courses and for the employees to attend. Despite this element of compulsion, the rewards cannot be underestimated.

It is unfortunate, however, that refresher courses are available only to a few categories of LIS professionals; those working as librarians in colleges, universities and similar academic institutions with a minimum grade of Rs8000 (€133.22) and above. Refresher courses are not available to professionals working in other types of libraries such as school libraries and public libraries. Professionals working in lower grades in academic institutions and universities are also excluded as are the semi-professional staff members in such libraries.

A well-planned CPD program should be worked out for the betterment of all LIS professionals. This is increasingly imperative in the new technological environment. A nation wide program is necessary in order for CPD benefits to be made available to all LIS professionals. The following suggestions are made:

1. There should be an apex CPD council or board responsible for all subjects.
2. There should be sectional committees, including one for LIS.
3. Recognized national associations should be represented on such committees.
4. LIS teaching forum should be given due recognition in the Committees.
5. There should be a National Council of Library and Information Science to provide national coordination.
6. There should be a National Institution for Continuing Education to coordinate and monitor LIS continuing education in India.
7. A Center for Life Long Learning should be established in recognized LIS Schools which should be funded by government/UGC to conduct regular courses for all types of librarians.
8. Courses should be designed for CPD at a national level, which should be updated every year by including new topics.
9. CPD by distance education should offer short-term courses. Initially the task may be assigned to 10 existing open universities for various disciplines. The fees structure should be less costly. Employers should provide at least 15 days leave per annum for staff to complete such courses. These courses should be structured so that they are available for all categories of professionals in all types of libraries. An apex body should be constituted to design course structures for these open universities.
10. Courses should be made available online.
11. The ILA should contribute to CPD programs.
12. There should be a national association, membership of which should be compulsory for all libraries and information science professional.
13. The national association should publish a monthly CPD magazine, especially designed for the purpose so as to include new developments in related fields. It should be made available free to each member.
14. Associations should be responsible for monitoring CPD activity and prepare an annual report to the national committee.
15. CPD participation should be made compulsory. Each promotion should be linked to CPD and promotion should be compulsory after a designated duration of service.
16. Regional, state and local level conference and seminars should be organized regularly.
17. Refresher courses for all types of librarians should be organized in each catchment area in cooperation with teaching faculty and working librarians.
18. Qualified library professionals must be allowed to guide research in library and information science.

19. Computer hardware and software and book industry partnerships may be sought to support CPD programs in LIS.

References

¹ *Manorama Year Book, 2004*. Kottam, Malayala, pp590-93.

² *UGC Pay Revision Report, 1988 and 1990*. New Delhi University Grants Commission, pp1-10.

UNDERSTANDING THE BIG PICTURE: WHAT IS NEEDED FROM A PROFESSIONAL DEVELOPMENT PROGRAMME TO SUPPORT HEALTH SERVICE LIBRARIANS IN ENGLAND?

Alison Turner

Library Partnership Co-ordinator,
National electronic Library for Health, NHS Information Authority,
Aqueous 2, Rocky Lane, Birmingham, West Midlands, B6 5RQ, UK
alison.turner@nhsia.nhs.uk

Linda Ferguson

Deputy Director – Learning and Skills Development,
NHS North West Health Care Libraries Unit, North West Centre for Learning and Skills,
Ground Floor, Brew House, Wilderspool Park,
Greenall's Avenue, Warrington, Cheshire, WA4 6HL, UK
lindaferguson.nhs@nwda.co.uk

Pauline Blagden

Service Development Librarian,
Library, Education Centre, St Marys Hospital,
Portsmouth, Hampshire, PO3 6AD, UK
pauline.blagden@porthosp.nhs.uk

Abstract

This paper focuses on work underway in England, to design and deliver a programme of professional development for all library staff in the National Health Service (NHS). This work is a partnership between various stakeholders. It is widely recognised that the role of the librarian in twenty-first century healthcare is changing. The new co-ordinated programme of professional development will provide a range of training opportunities based on nationally agreed learning objectives, with a commonly agreed structure and delivery mechanisms that connect and build on existing work. The programme will address various levels of delivery including national, regional and local. The programme will be informed by an examination of the training and professional development needs of library staff, within the wider context of a changing health service. This early work (September 2004 – January 2005) will result in an overview of the key training and professional development needs of library staff including priority areas for development. Examples of training successfully delivered across the country, which may provide valuable models will be identified. There will be a review of other work relating to training needs within the wider library community. Recommendations for future work will be made. The presentation of this paper will share results from this initial work.

Introduction

2004 has been a year of significant change for library staff in the National Health Service (NHS). Within the library sector itself, there is a programme to develop the National Library for Health (NLH), a hybrid network of physical libraries and digital resources and services. Within the health service, new initiatives that will have a great impact include: the NHS Knowledge and Skills Framework; national competencies for NHS library and knowledge management staff; and Agenda for Change, a new pay system. Within the wider

environment, other significant developments include; new Skills Sector Councils; and the Chartered Institute of Library and Information Professionals' (CILIP) new Qualifications Framework and the work of MLA (the national development agency for England's museums libraries and archives) in developing a Workforce Development Strategy to produce a skilled and diverse workforce.

Currently, training and development for library staff is organised and delivered by a range of providers, for example: Strategic Health Authorities, national organisations, professional groups, universities through departments of Library and Information and related studies and private companies. The result is that whilst there are excellent examples of training, existing provision is not co-ordinated across the country. The initiative to develop the NLH includes a workstream dedicated to delivering an effective programme of training and development, through a partnership of key providers. The NLH will work principally with the Health Libraries Group (a Special Interest Group of CILIP) and the NHS Library and Knowledge Development Network, thus bringing together the key training providers to health librarians. The aim is to develop a programme providing a range of training opportunities based on nationally agreed learning objectives, with a commonly agreed structure and delivery mechanism that connects and builds on existing work. The programme will also explore accreditation of existing courses. Where regional provision already exists, the NLH will work with these organisations to ensure that learning opportunities are not duplicated but rather complement one another. In essence, training opportunities will be delivered according to need: locally, regionally, nationally; face to face, electronically, and in a blended style.

Supporting changing needs

The following are three of the areas where more support is needed for effective training and development of library staff: supporting new and expanding roles for all staff, supporting paraprofessionals and supporting development of the profession. Librarians have the opportunity now to take on a range of new roles, for example, as clinical librarians working alongside health professionals in the workplace, project managers, health informatics specialists, knowledge managers, primary care outreach links and teachers and trainers. The changing role of librarians is highlighted in several recent reports. For example, the OCLC report¹ examines effects on libraries of the trends towards self-sufficiency, disaggregation of content and increased collaboration: "It makes a great deal of sense for libraries to look for new, broader service opportunities within their communities".

One result of new roles such as these is putting the librarian closer to decision making. This is a significant development for the profession and one which may impact on the profile and perception of the contribution that librarians can make to healthcare. Such roles provide an opportunity to mainstream librarians, that is, becoming embedded in their organisations, whereas now they are often seen as slightly external to the core activities of their host organisation. Anecdotally, library staff have expressed a need for better understanding of health care processes. This essentially refers to better understanding of how decisions are made in health care, both by clinicians and by managers. These roles also require excellent communication skills, such as persuasion, influencing, marketing, strategic thinking and leadership.

Library assistants, as paraprofessionals, are a vital part of library services and are the frontline contact for library service customers. Library assistants require support to develop skills to perform effectively but also to progress in their chosen career paths, which might lead to a formal library qualification, a position in another area of health informatics, or other chosen path. A key debate is the future role of library assistants as more customers become self-sufficient (so requiring less administrative support, such as document requesting) and as

more services and resources are delivered outside the library walls. Will library assistants become more responsible for day-to-day management of services? Will they become more involved in outreach work?

Alongside new roles, the library and information profession is also changing. Evidence-based librarianship offers many opportunities but also, for many, requires a new set of skills such as research skills and critical appraisal. Such developments also encourage a new way of thinking, promoting knowledge sharing, active research, questioning actions and evaluating outcomes. To compete in the jobs marketplace, library staff are now expected to demonstrate a range of “skills beyond subject knowledge”,² including business awareness, communication, team-working. Added to these new pressures, there is a growing emphasis on the importance of learning and development. Within the UK, government policy encourages lifelong learning. Professional bodies, such as CILIP, although always encouraging professional development, have developed new ideas (such as revalidation) to stress the importance of professional development to the individual, the service and the profession. In short, we now work in a fast-changing environment and as individuals, we have to learn and adapt quickly. A programme to support training and development must therefore be flexible, responsive to need, and based on anticipated future needs but at the same time recognise that there will still be demand for support to develop some of the more traditional skills.

A key consideration in designing an effective programme of development for all library staff is engagement at the right level. For instance, a library assistant on an enquiry desk might need basic understanding of critical appraisal to deal with an enquiry; a trainer will need sufficient knowledge and skills to facilitate learning; and a clinical librarian will need skills to conduct critical appraisal on behalf of clinicians. Other factors include potential barriers to learning, such as lack of time, geographical barriers, particular learning styles, lack of funding. These need to be overcome if learning and development is to be accessible to library staff.

Recent findings

A number of recent studies are informing work within the NLH to support learning, training and development. The following are a range of examples to show the key issues and needs which must be tackled. A national training needs analysis of library staff in the NHS was conducted in 1999, by a team at the Library and Information Statistics Unit, Loughborough University.³ Even in the relatively short time since then, the emphasis on roles and activities has changed somewhat: “The tasks most frequently undertaken by respondents were circulation desk activities (that is, those operations connected with the loans procedure), dealing with requests for information, training library users in information skills, and CD-ROM, Internet or database searching. Few participants are currently involved in developing or managing web sites, intranets or knowhow systems”. However many of the findings remain relevant: “It is therefore both imperative and opportune to train the NHS workforce to meet the challenges of change.”

Prior to commissioning the FOLIO programme (<http://www.nelh.nhs.uk/folio>), the National electronic Library for Health (which forms part of the NLH) commissioned a small desk research project.⁴ The FOLIO programme is a series of modules for library staff, delivered electronically, to appeal to those individuals who find it difficult to leave the workplace (for various reasons including inadequate training budgets to cover travel, lack of staff to cover services in the absence of staff). Funded by the National electronic Library for Health, the modules are free of charge to librarians. To date, four modules have been delivered to over 150 participants. The aim of the desk research project was to inform development of FOLIO by painting an accurate picture of the training provision and training

requirements of NHS librarians. The project also aimed to address the future development of e-learning opportunities for NHS librarians within the context of continuing professional development. The report emphasised the need to address changing roles: “As the need for information and knowledge services has grown, NHS librarians have witnessed their roles evolve in many ways, including knowledge management, providing training in information and evidence-seeking skills, involvement in clinical decision making and implementation of policies”.

Earlier this year, CILIP published a report⁵ from their Health Executive Advisory Group, on future-proofing the profession. The report focuses clearly on the role for effective training and development to support library staff in developing skills and knowledge required in the twenty-first century. It examines how the role of health librarian has developed and how it is likely to develop: “The second trend we have noted is how roles outside the library have increased. Clinical librarians began working on the wards in clinical teams as early as the 1970s. The emergence of new technologies and better electronic resources has enabled the expansion and development of this role”. The report has recently been endorsed by the CILIP Council and discussions are underway on the actions required to meet the report’s recommendations.

These examples offer important, interesting and generalisable conclusions. However, there have also been many studies focusing on more specific aspects, for example at particular roles or on a geographic basis. For example, a recent survey of clinical librarians⁶ highlighted the need for specialised training and development: “CPD will therefore be important to the continuing expansion of these types of roles, encouraging CLs to explore the ways in which they can support health professionals, particularly with respect to the creation of critically appraised search results”. The report recommended the formalising of professional development opportunities for clinical librarians.

A recent report⁷ focused on the role of outreach librarians working in primary care. The report looks at how these roles vary, in terms of geographic areas covered, number of customers, time spent on outreach work and activities undertaken. It stresses the need for coherent professional development if such roles are to make a significant contribution to primary care. The following needs were identified by means of a survey (listed in order of priority):

- influencing managers, that is, help in “penetrating the organisation” and “getting the managers on board”,
- improved understanding of user needs “so we can target our training advice and save them time”,
- understanding knowledge and information resources themselves,
- teaching skills,
- marketing services.

Respondents also mentioned the need for robust mechanisms for sharing experience and networking. Studies have also been conducted at a regional or local level in the health service. The following are a selection of recent examples.

A training needs analysis, conducted in London in Summer 2004, used brainstorming as an innovative method of gathering ideas and thoughts. Over 600 suggestions were received. Needs identified were ranked as follows (other headings, in order of preference, include: Communication Skills; Financial Management; Personnel Management and Information Technology Skills);

1. Information Retrieval/Bibliographic Databases (for example, knowledge of what is available on various databases, generic literature search skills).

2. Teaching/Training (for example, train the trainers, e-learning support, learning theory).
3. NHS Policies and Developments Awareness (for example, structure of the NHS, decoding jargon, important developments).
4. Research Support (for example critical appraisal, understanding evidence-based medicine, understanding statistics).
5. Business Management (for example, strategic planning, service evaluation, project management, income generation).
6. Customer Handling Skills (for example, reference interviewing, telephone skills, customer care).
7. Legislation Awareness (for example, copyright, data protection, freedom of information).

A training needs analysis in the South West area of England focused on needs relating to knowledge management. This analysis used a questionnaire and facilitated workshop to gather information on needs. The resulting strategy was outcomes-focused and considered how professional development should be designed to meet targets and objectives. Key needs identified were making sense of the NHS, marketing and understanding client needs, foundations in knowledge management, selling and customer management, searching skills and influencing and speaking the NHS jargon.

A task and finish group was set up in the North West of England specifically to consider changing roles and opportunities provided by the changing environment. Mainly driven by a new project to develop a single search environment, the aim of this group was to consider how recent and anticipated changes could impact on the library profession. The group worked on an initial SWOT analysis to inform a discussion of potential future roles. Group members then consulted with their own local library networks. A literature search was conducted to identify recent research in this field and validate findings of the group. The group's findings list the following potential roles for library and information staff:

- outreach librarians working alongside clinicians,
- expert searchers,
- teachers and trainers,
- electronic resources officers, leading on managing and developing resources,
- electronic learning support and help desk officers,
- information technology champions within teams,
- customer services librarians ,
- marketing leads,
- library and information service managers,
- knowledge managers,
- library assistants, overseeing administrative tasks,
- patient and public liaison roles,
- current awareness publishers.

The group's conclusions included a range of key points. There is a need for considerable additional training at all levels. Many of the roles overlap. Not all roles will be complete roles; most individuals will undertake a combination of roles. A large number of the roles are not totally new but rather include new aspects. All staff need generic skills (e.g. time management, assertiveness skills) underpinning the specialist skills and knowledge. As people are up-skilled / re-skilled, there will be a blurring of professional / paraprofessional and non professional roles leading to flatter operational / management structures.

It is clear from the examples written in this paper, that there is consensus on the core training and development needs of library staff. Many mention the need to develop skills in communication and business awareness, to learn more about the health service so as to be able to communicate with customers more easily and target services appropriately. Technical skills, such as searching, are also highlighted. There are also many references to 'newer' skills such as knowledge management, evidence-based practice and research skills. It is essential that the new programme of professional development and training caters not only to these general needs but also to the more specialist needs, if it is to support the new and emerging roles in the profession.

Knowing what we know

As mentioned earlier, the last training needs analysis³ of library staff was conducted in 1999. As outlined in the review of recent findings, the world has changed considerably in the last few years. It was decided that an updated perspective was required, to reflect such change. However, before embarking on new primary research, it was considered that the wisest approach would be to review what is already known, what has already been reported and what has been discovered. Currently, this knowledge is out there but not yet organised in a helpful way. This paper refers to just a few examples of recent work and there is a pressing need to gather existing explicit and tacit knowledge in a useful format with which we can plan future activities.

A study to review and synthesise this existing knowledge was commissioned in September 2004. Following a small tender exercise, the contract to run this study was awarded to the University of Wales Aberystwyth (<http://www.dil.aber.ac.uk/default.asp>). The study will provide:

- an overview of the key training and development needs of NHS library staff including priority areas for development;
- examples of training programmes successfully delivered across the country, which may provide valuable models for a programme of professional development;
- examples where training programmes have been accredited and recommendations for future accreditation;
- a review of other work relating to training and development needs within the wider library community;
- recommendations for future work, for example, should a national training needs survey be commissioned?

The team from University of Wales Aberystwyth began work in October 2004. Their final report will be published by March 2005 and will be available via the National Library for Health web site (<http://www.library.nhs.uk/forLibrarians>).

The study comprises three main elements. There was a literature review of existing published and unpublished studies. The researchers are reviewing training and development needs analyses undertaken in the last three years. The desk research also entails a literature review of published studies and an analysis of the outcomes from unpublished studies, carried out by Strategic Health Authorities, professional groups and other national/regional agencies. Unpublished studies will include surveys, brainstorming and focus groups. Interviews with opinion leaders also took place. The researchers have conducted a range of interviews with key opinion leaders, for example Strategic Health Authority Library Leads and members of the professional groups. Two workshops were held with library staff. The team have also held workshops for library staff, in Manchester and London. The aim of these workshops was to validate findings so far and to provide an opportunity for library staff to contribute. An

opportunity was also provided for those wanting to contribute (via e-mail) who were unable to attend a workshop. This work is intended to provide a snapshot of current training and development needs and current provision of training. This will enable the subsequent development of a programme to meet the most pressing needs, using the most appropriate models of delivery.

The interim findings from the workshops show a shifting emphasis on new types of skills. For example, librarians expressed a need to develop skills in marketing and promotion. This is supported by a recent article by Wakeham⁸ discusses the need for NHS libraries to market their services to actual and potential users and comments “Librarians should find marketing and promotion a core element of their professional role”. An audit conducted as part of a training needs analysis for South Yorkshire (also conducted by the University of Wales Aberystwyth and at the time of writing, still underway) shows the amount of time spent on influencing and promoting is relatively small; anecdotally, library staff have reported this as an area where training is needed urgently. Librarians attending the workshops discussed the implications of changes within the health service and within the profession and the potential impacts on their services and on them as individuals. Accreditation of learning was also discussed with many participants agreeing that professional development could offer incentives such as this. Participants were also asked to discuss best approaches to delivery of training, such as what should be done locally or nationally. Final results from the study will be published and the presentation of this paper will summarise the key findings.

Next steps

The study will report in early 2005. A small project group has been set up to manage the study, with representation from key groups. On publication of the report, this group will be expanded to include wider representation, and the group’s remit will extend to one of reviewing and acting on the report’s recommendations. The main work of the group will be to design, develop and deliver a coherent and comprehensive programme of training and development, along the following principles. It will:

- address needs of all library staff,
- meet priority needs first,
- outline levels of responsibility for individuals, services, commissioners and providers,
- clarify role of key partners,
- will join up provision,
- will make it easier for library staff to identify and obtain learning and development opportunities,
- build on existing provision of training,
- avoid duplication.

The group will address current issues, for example, by exploring the feasibility and potential benefits of accreditation. The group will also consider barriers to learning and how these might be overcome to deliver effective learning and development in a format which suits library staff. The programme will provide library staff with an easy route to professional development by offering a range of opportunities, delivery mechanisms and sources of funding.

References

¹ OCLC. *The 2003 Environmental Scan: Pattern Recognition*. Dublin, Oh.: OCLC, 2004. URL <<http://www.oclc.org/reports/2003escan.htm>>

² Webb, S.P. *Sharpening Skills, Acquiring Knowledge*. Ashford: FreePint, 2004.

- ³ Maynard, S., Kinnell, M., White, S., & Yu, L. *Training Needs Census of NHS Library Staff*. Loughborough, University of Loughborough: Library & Information Statistics Unit; 2000. URL <<http://www.londonlinks.ac.uk/Archive/rlg/publications.htm>>
- ⁴ Lacey, T. & Booth, A. *Education, Training and Development for NHS Librarians: Supporting e-learning*. Sheffield: ScHARR, 2003.
- ⁵ Health Executive Advisory Group. *Futureproofing the Profession. Report of the Health Executive Advisory Group to the Executive Board of CILIP*. London: CILIP, 2004. URL <<http://www.cilip.org.uk/aboutcilip/howcilipworks/structure/committees/executive/healthexecadvisgroup.htm>>
- ⁶ Ward, L. *A Survey of UK Clinical Librarianship 2004. Final Report. Survey of health librarians in the UK February 2004*. Leicester: Leicester General Hospital, 2004. URL <<http://www.le.ac.uk/li/lgh/library/clinlib.htm>>
- ⁷ Lacey-Bryant, S. NeLH Outreach Librarian Support and Development Project. The findings of a survey of 'Outreach Librarians'. Didcot: Drs Net, 2003. URL <http://www.londonlinks.ac.uk/events/sue_lacey_bryant_26_jan_2004.pdf>
- ⁸ Wakeham, M. Marketing and health libraries. *Health Information and Libraries Journal*, 2004, 21 (4), 237-234: p242.

LEADERSHIP TRAINING FOR ALL: PROVIDING OPPORTUNITIES FOR DEGREED AND NON-DEGREED LIBRARIANS IN A REGIONAL INSTITUTE

Janelle M. Zauha

Montana State University Libraries,
PO Box 173320
Bozeman, MT 59717-3320, USA
jzauha@montana.edu

Abstract

Developing library leaders for the future is an issue of global concern. Faced with rapidly changing roles, escalating ethical and political challenges, and varied pre-career educational opportunities, our profession is looking for the best ways to identify and nurture new leaders from all levels of its ranks. This paper focuses on one region's efforts to address leadership development needs. It discusses current thinking about leadership, reviews a current popular trend in professional development for librarians, and presents a case study of a new leadership institute offered by the Pacific Northwest Library Association (PNLA), a bi-national organization that serves a large region spread over the western United States and Canada. A summer of preliminary participant evaluation and survey data concludes the paper.

Leadership in the library profession

Concerns about library leadership today are as multi-faceted as they are widespread. We are worried that not enough people will enter the profession at a time when so many are retiring. We worry that those who have joined the profession recently, with their advanced technical knowledge and focus, are fundamentally different from traditional librarians. Those currently in the profession are experiencing stress from the work of navigating constant change. This makes our present work force feel over-loaded and not well equipped to lead libraries through the chaos of accelerating ethical, political, fiscal, and technical challenges facing them today. All of these factors enter into our discussions of succession planning, leadership, and the basic future of the profession.

Our concerns could fill pages. Fortunately, so could the solutions that are being explored all over the world. Library leadership development is a particularly hot topic in the United States and in Canada. The result is an ever growing set of options for developing those qualities that make one a leader in librarianship. This paper focuses on one region's efforts to address leadership development needs. It discusses current thinking about leadership, reviews a current trend in professional development for librarians, and presents a case study of a new leadership institute offered by the Pacific Northwest Library Association (PNLA), a bi-national organization that serves a large region spread over the western United States and Canada.

Definitions of leadership

Definitions of leadership are even more varied than our concerns about it. Donald E. Riggs counts "at least 100 definitions of leadership...includ[ing] leadership styles, functional leadership, situational leadership, bureaucratic leadership, charismatic leadership, servant leadership, follower leadership, group-centered leadership, and so on".¹ Diversity of definition is further deepened when cultural differences are considered within and across countries.²

This does not mean that some common trends in leadership development are not emerging in North American libraries. Generally, in the United States when we talk about 'leadership' in libraries today, we do not limit our discussion to those who fill the highest positions – directors, deans, department heads, or presidents of associations. Nor is leadership seen, as it traditionally has been, as an exclusive society at the top of the management hierarchy. Leadership is now more often looked upon in a democratic light, as a varied set of attitudes, qualities, skills, and tools that any committed person, in any library position, might develop and employ. Works such as Ira Chaleff's *The Courageous Follower* have helped to redefine and broaden the concept of leadership to embrace the possibility of leading from any position.³

Likewise, 'leadership' and 'management' are generally no longer considered synonymous, although they are still likely to be confused. Warren Bennis's often quoted work *On Becoming a Leader* distinguishes between leaders and managers in a list that reads like the differences between the good guys and the bad guys in American westerns: a leader innovates, originates, develops, focuses on people, inspires trust, looks long range, watches the horizon, challenges, is her own person, and does the right thing. A manager pretty much does the opposite, according to Bennis.⁴

Bennis's point in drawing such a stark contrast is to underscore his basic premise "that leaders are people who are able to express themselves fully...[T]hey know who they are, what their strengths and weaknesses are, and how to fully deploy their strengths and compensate for their weaknesses. They also know what they want, why they want it, and how to communicate what they want to others, in order to gain their cooperation and support. Finally, they know how to achieve their goals." Leaders tend toward action and innovation, propelled forward by the internal power of self-knowledge.

Read within a cultural context, it is easy to see why it is appealing to North American institutions to define leadership as highly individualized and democratic. In the current library environment of intense change, it makes sense that our definitions of leadership are colored by the need for decisive action and heroic accomplishment in the face of seeming chaos. This, in turn, influences the leadership development programs we create.

Leadership institutes

One of the primary ways library leadership development is being addressed today is through leadership institutes. These institutes are usually brief (3-5 days), intense learning experiences geared toward small groups of librarians or library workers (20-40 participants) in various career phases and positions. They usually involve some residency component, and also use facilitators or instructors, and mentors. Some include follow-up activities carried out over one or two years. Library leadership institutes are not unique to the United States – Australia's Aurora Leadership Institute has been in place since 1995. Canada's Northern Exposure to Leadership began in 1994. The South Africa Library Leadership Project (SALLP) began in 2002 and involves some training in the US, as well as on-going group contact.⁵ Additional non-institute leadership experiments taking place outside the US are also reported in the literature and include the Christchurch City Libraries (New Zealand) "coaching quads".⁶

In the United States, leadership development initiatives in the form of intensive institutes have been offered at different levels and locations since the early 1990's. A growing number of state-level leadership institutes are being offered. Some of the most established include Ohio Library Leadership (since 1993), TALL (Texas Accelerated Library Leaders) Texans Leadership Development Institute (since 1994), the Maryland Library Leadership Institute (since 1998), the Nebraska Library Leadership Institute (since 2001), and the

Wyoming Library Leadership Institute (since 2001). These local institutes vary in contact time and frequency and are targeted toward librarians within their state, often both degreed and non-degreed with varying levels of experience.

On the national level, several high-profile leadership institutes are offered. One of the first, the Library Leadership Institute at Snowbird (Utah) (since 1990, recently suspended indefinitely) is not geographically limited. It draws participants and mentors from around the country and frequently from other countries as well. Another nationally defined institute is the Association of College and Research Libraries (ACRL) / Harvard University Leadership Institute for Academic Librarians (since 1999), which is focused on higher-level administrators. These national institutes are usually very specific in their applicant requirements, which usually include a Masters in Library Science or some other American Library Association (ALA) accredited degree as well as other specific criteria such as number of years in the profession or management position.

In between these state and the national level institutes is an emerging category of regional library leadership institutes developed and supported by regional library associations for their member chapters. These regional institutes often serve a large geographic area and help to fill a leadership development need that individual state chapter associations would find expensive to fill on their own.

The annual Mountain Plains Library Association (MPLA) Leadership Institute serves the twelve MPLA member states of Arizona, Colorado, Kansas, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, South Dakota, Utah, and Wyoming. Participants are required to hold an MLS, have less than 10 years post-master's work in a library related job, work in the region, and belong to one of MPLA's affiliated state library associations.

The New England Library Association (NELA), covering a 6-state region including Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, and Vermont, has launched the biennial New England Library Leadership Symposium (NELLS). NELLS is focused on a broad spectrum of library personnel, including professionals, paraprofessionals, and volunteers (trustees or friends) who are in mid-career with at least 3-5 years experience in or with libraries, and who must belong to one of the six NELA state associations. The MLS is not required.

The newest regional library leadership institute to emerge is the Pacific Northwest Library Association's (PNLA) Leadership Institute, first delivered in fall 2004. Because of the unique bi-national nature of PNLA and its region, the recent development of its institute is of special interest to the global library community. What follows here is a case study of PNLA's first institute, including the planning, delivery, participant and mentor profiles, and initial participant response.

One region's answer to leadership development needs

One of the oldest regional library associations (1909), PNLA has a membership that today hovers around 350. It serves a large geographic area spread across the farthest northwestern reaches of North America including library association chapters in the US states of Alaska, Idaho, Montana, Oregon, and Washington, and the Canadian provinces of Alberta and British Columbia. Together, these entities cover a landmass of 1,684,795 square miles, adding up to a vast region characterized by relatively scattered population pockets, bisection by a national border, and wide economic variances.

PNLA's mission is to "provide opportunities in communication, education, and leadership that transcend political boundaries,...meet continuing education needs of the region [and] develop stronger library networks and networking..."⁷ Gathering input from chapter associations and monitoring trends and events in the region are considered essential

for fulfilling this mission. To facilitate this, a representative from each chapter state and province sits on PNLA's governing board.

PNLA's initial exploration of a regional leadership institute came as a direct result of input from its chapters. The idea came before the board in spring 2001 at the request of then president of the Oregon Library Association, Anne Van Sickle. Input gathered in 2002 from other member associations indicated that there was significant interest in PNLA taking the lead on developing such an institute at the regional level. In particular, chapter associations expressed concern over their individual abilities to deliver the kind of intensive professional development opportunity necessary to grow leaders who would become further involved in professional associations at the state, regional, and national levels, and who could step into management positions in libraries. The lack of local leadership development opportunities was keenly felt in a region that is predominantly rural and is challenged by great distances between cities. In addition few local MLS programs are available, and distance MLS programs are often prohibitively expensive in comparison with generally low wages for the non-degreed librarians who direct many rural libraries in the region and fill key positions in others. Funding for professional development across the region is decreasing as government funding for state and provincial libraries is cut. The budgets of chapter associations are often strained to fulfil increased membership needs in lean years.

As a result of this input, PNLA agreed to explore further the feasibility of a centrally administered leadership institute that would address the special needs of libraries in the region, capitalize on the strengths of a bi-national population, and, as a side benefit, heighten the profile of PNLA in the region.

Planning the PNLA Leadership Institute

In 2002 PNLA President Sandy Carlson (formerly of Kitsap Regional Library, Bremerton, Washington) formed a subcommittee composed of several state and provincial representatives on the PNLA board to identify options and sketch out a proposal. They turned for research assistance to several students at the University of Washington (Seattle) Information School who were asked to survey the characteristics of selected library leadership institutes currently being offered around the US and Canada. As well as identifying several possible models, budget options, and assorted best practices, their research identified consultants working in the area of leadership training who could potentially lead PNLA's institute.⁸

In early summer 2003, a request for proposals (RFP) was sent out to several consultants. Of those returned, Schreiber Shannon Associates were chosen by the Board for the quality of their curriculum, their experience, and their success record, which includes the Australian Aurora Leadership Institute and the Leadership Institute at Snowbird. At least one member of the planning committee had attended an institute lead by them and highly recommended their work. We could see that these consultants would help PNLA deliver a leadership development experience that would go beyond basic skills into the realm of self-discovery and visioning.

A major concern, of course, was how the institute would be financed. PNLA's goal was to make participation as affordable as possible while still delivering a quality experience. To do this we followed a model that several other institutes have used: a combination of funds contributed by the lead institution (PNLA), seed money from stakeholders (PNLA's member associations), some corporate sponsorship, and registration fees. Fees for participants were set at \$1,000 each, payable in the currency of the participant's country, a concession that helped to make the institute equally affordable for both US and Canadian participants.

Location was also a key consideration. Dumas Bay Centre, a retreat and community arts facility owned by the city of Federal Way, Washington, located just outside Seattle, was chosen for its relatively central location near a major airport (SeaTac), for its affordability, and privacy. PNLA has used this center for board meetings for several years and was well aware of its strengths and weaknesses. Timing was critical for the institute. Planners decided on October 24-29, 2004 because of fewer professional conflicts, and the availability of the facilitators and of Dumas Bay Centre. Choosing to deliver the Institute sooner rather than later required a leap of faith of the highest order. While some might have been more comfortable waiting until 2005, the majority of the board agreed that current momentum was strong and that everything would come together.

With key components of facilitators, budget, location, and dates in place, the planning committee and PNLA Board turned to address other critical matters such as potential mentor identification and selection, the application process, and participant selection criteria. In Fall 2003 Susannah Price (Boise Public Library, Boise, Idaho), a recent past PNLA President and Idaho Representative, took over as coordinator for the Leadership Institute when Carlson's commitments would not allow her to continue in that role. Under Price's leadership the Board developed a plan for mentor and participant selection, as well as an application package.

Mentor selection

Quality of mentors can determine the success or failure of a professional development activity so it was important to lure excellent mentors from around the region. Eight mentors would need to be recruited to provide sufficient one-on-one contact for the anticipated 36 participants who would be divided into 4 learning groups. Finding mentors who represented the various PNLA chapters was considered a priority so the planning committee came back to the board for nomination of appropriately experienced and committed librarians from around the region.

Although initial nomination was up to each representative, the board discussed all options before deciding whom to invite. Considerations included type of library, gender, and position or profile in the profession. Mentors were not required to be members of PNLA. It was decided that two potential mentors from each state and province would be approached to determine interest and availability. If open to serving as a mentor, their names would be placed into a pool. Once this pool was formed the Institute coordinator developed a draft list of mentors that would provide an optimal mix of location, library type, and gender. The board reviewed the list and gave approval to invite selected mentors. Mentors were assured that their room and board expenses would be covered and that some travel expenses would also be reimbursed.

Mentors were enthusiastic and the acceptance rate was high. Each of the seven chapters was initially represented in the pool and the current PNLA president rounded out the group to total the necessary eight. One mentor subsequently dropped out and no other from that chapter (Washington) could be located at the time so another chapter's alternate was invited instead. Our mentor selection process resulted in the following mix:

- gender: six women and two men,
- library type: 4 from public libraries, 2 academic, 1 school, and 1 corporate.
- nationality: 6 US and 2 Canadian
- leadership experience: an ALA past president, a PNLA president, 4 past presidents of state or provincial library associations, 3 department heads, and 4 library or branch directors.
- education: all mentors held an MLS degree (although this was not required)

- leadership training: half had participated in some other leadership institute such as Snowbird or Northern Exposure.

Selecting future leaders

The PNLA board took determination of applicant criteria very seriously. Our research into other institutes revealed a broad range of possible selection criteria, including educational attainment and management experience, but input from PNLA's member associations signaled that similar criteria would not work for this region. It was decided instead to offer equal opportunity for degreed and non-degreed librarians with a wide range of library experience (5-15 years).

This was a difficult decision to make. We knew that through openness we might risk diluting the experience or placing incompatible experience levels at the same table. Yet across the Pacific Northwest we were witnessing non-degreed librarians increasingly called upon to play leadership roles in their associations or institutions. It was also felt that in the midst of tremendous change in the library profession and in the North American west generally, it is not just new librarians who need to develop leadership abilities. Librarians might in their 5th or 10th or 15th year be called upon to fulfil hitherto unheard of roles or might discover new opportunities that required equally new leadership abilities.

Diversity was another issue. For a predominantly female profession working in a region that has pockets of ethnic and racial diversity but is primarily white, we knew that lack of diversity in participants might be a difficult hurdle to overcome. The diversity we chose to pursue for our first institute, then, was that of education, experience, and position. We felt that enabling a unique mixture that prioritized *professional* diversity would offer opportunities for interaction among groups who might rarely sit as equals at the same table, enabling high levels of discovery and self awareness irrespective of organizational hierarchies, levels, or lines – something that many libraries are trying to grapple with internally as they develop new ways of dealing with rapid change.

We also chose not to require nomination, keeping the application process very open. Instead, we asked applicants for a letter of support from an employer, library association, or school; two letters of recommendation; a one-page resume; and a one-page summary of achievements, career goals, and expectations of the institute. The board and planning committee also decided to prioritize their selection of applicants based on geographic location. Since most chapters of PNLA had contributed seed money to the institute, we felt it was important to select a base-line number from each chapter. We placed the optimal number of participants at 36, or 4 groups of 9 each. Thus, states or provinces whose applicant numbers totalled 4 or fewer were assured that all their applicants would have a space at the table. Of those with more applicants (Alaska, Oregon, Idaho, and Washington), other selection factors (quality of application, experience, and references) came into play. This ensured that each state or province in the PNLA region had at least one participant and could see some return on its investment.

A snapshot of participants

Out of 41 applications received, 36 participants were selected. Our commitment to representation from around the region meant that we had a group whose experience and education were mixed. Of the 36 who attended, 32 were female (89%) and 4 male (11%). The average library experience per attendee was 9.5 years (our requirements were no more than 15 years and no less than 5). Of the 36 attendees, 25 (69%) already play a leadership role in a library, either within a titled management position or in an untitled position that requires leadership skills. 11 (31%) were not in leadership roles.

Application requirements for the Institute stated that no degree was necessary for participation. The result was a mix of education levels dominated by the MLS degree.

Figure 1 Education variance between participants

Education level of participants			
Degrees earned	Number holding	Total %	Notes
No higher ed degree	3	8.3	
Undergrad degree	8	22	(includes 1 MLS in progress)
MLS degree	21	58.3	
MLS plus other post undergrad degree	2	5.6	
Non-MLS post undergrad degree	2	5.6	(includes 1 MLS in progress)

The geographic spread of participants was a natural result of the make-up of PNLA and our selection priorities (Figure 2). Although urban or rural dwelling were not selection considerations, the general availability and cost of professional development opportunities for those residing in rural areas was a significant consideration for PNLA in the planning of the Institute. Low numbers of Canadian participants indicate PNLA's lower profile in Alberta and British Columbia, reflected in membership numbers as well.

Figure 2 Distinctions between urban and rural based on 2000 census data.

Geographic Location Of Participants			
State or Province	Total	Urban	Rural*
Alaska	7	2	5
Idaho	4	3	1
Montana	4	1	3
Oregon	9	8	1
Washington	10	10	0
Alberta	1	1	0
British Columbia	1	1	0
Total	36	26	10
Percent Total	100%	72%	28%

‘Rural’ is defined as places with populations of less than 90,000 and not bordering larger metropolitan areas.

Type of library, while not a selection criterion, emerged as an important factor in terms of discussion focus during the Institute and has implications for future networking options for both participants and mentors. Not surprisingly, 66% of participants came from public libraries; however all library types were represented in the participant pool (Figure 3).

Figure 3 Institute participants by type of library

Institute Participants By Type Of Library		
Library type	No. of participants	% of total
Public	24	66%
Academic	6	17%
Special	4	11%
School	2	6%

Another requirement of all applicants was that they belong either to their state or provincial library association or to PNLA. In addition to specifically indicating their membership(s) in either or both of these bodies on their applications, participants also submitted a brief professional resume. These two pieces of information reveal that the majority of our successful applicants belong to a state or provincial association. Fewer belonged either currently or previously to a regional level association. Still fewer were members of any national library or information association. Active involvement in any of these organizations was identified by an assortment of activities – committee work, presentations at conferences, or offices held. Because PNLA’s chapters were specifically interested in leadership training that would help provide more manpower for their associations, it is instructive to see that prior to the institute many participants identified themselves as members of various professional associations, but relatively few were active (Figure 4).

Figure 4 Relationship with library associations

Relationship With Library Associations		
Type of Association	Hold Membership In	Are Actively Involved In
State or Provincial Library Assoc	33 (92% of total)	15 (42% of total)
Regional Library Assoc	16 (44%)	4 (11%)
National Library Assoc	13 (36%)	8 (22%)

The 5-day institute schedule was very tightly structured. The entire group numbered 48 (36 participants, eight mentors, two facilitators/consultants, and one coordinator and her helper) and we had very little time alone. Days were spent working variously in ‘learning groups’ (tables of eight plus two mentors) and in whole group learning and discussion. The group essentially spent 12 hours a day together, primarily in a large common room divided into tables for group work. Each participant had his or her own sleeping room at Dumas Bay, took most meals there, and used the grounds for exercise, introspection and socializing.

The Schreiber Shannon curriculum does not focus on rudimentary managerial skills such as budgeting or supervision. Group work was centered on activities designed for intense learning in areas such as conflict management, self-awareness, relation to change, collaboration, visioning, self-empowerment, and risk taking. The goal was for participants to experience in a safe environment the stressors that leaders feel in the real world. Participants then learned from their own reactions and interactions. Moving out of one’s ‘comfort zone’ was actively encouraged in order to gain greater self-awareness.

Mentors were also part of this learning. They played a key role in reflecting back to their groups and to individuals what patterns and problems they saw. Mentors were not

allowed to lead their groups, only to challenge, counsel, provide clarification, and at times provide in-depth information about their own struggles and successes as leaders.

While the rhythm of each day's work was very intense, it often mirrored what many of us see in our day-to-day library work: collaboration in group meetings interspersed with listening and learning, punctuated by individual work, then returning again to the larger group. The difference at an institute like this lies in the reflection, feedback, and attention that participants receive – things rarely experienced in our daily work.

Participant feedback and follow-up

Did the PNLA Leadership Institute work? How will we be able to tell if it did? Those are the big questions for PNLA and its chapters. Leadership development is notoriously difficult to measure or track with any scientific certainty. Exit evaluations from participants and mentors indicate predominantly positive responses to the institute. High marks were given for meeting our objectives and for the work of the organizers, consultants and mentors. Many comments ratified the planners' intentions. For instance, when asked, "What was your most significant learning from the institute?" some very powerful statements were made:

- I discovered that I must move toward personal achievement and toward a positive focus.
- Helped me to look inward at issues I've wanted to address.
- Leadership is a personal journey.
- I need to change my life.

More difficult to measure are the longer-term outcomes and impacts on participants' professional lives. Since leadership development is not easily quantified or 'calendared', it will be imperative that the developers of future PNLA institutes find ways to track professional progress and solicit meaningful feedback on the impact of the experience over time.

Steps are already being taken to ensure that this is done. A Web survey conducted 6 weeks after the institute provides further insight on possible professional impact. Of 36 participants surveyed, 33 responded, for a strong return rate of 91.7%.

Responses give some indication of self-perceived impact on participants' professional lives, particularly in the leadership skill areas targeted by the curriculum (Figure 5). When asked to respond to the statement, "Since my return to work, I have used skills I learned at the Institute," 18.2% strongly agreed, 69.7% agreed, 3% were not sure, and 9.1% disagreed.

Figure 5 Respondents reporting gains in leadership skills as a result of the institute

Leadership Skills	Participants Reporting Gain %
Conflict Management	79
Self Awareness	97
Collaboration	85
Visioning/Idea Generation	84
Self Empowerment	79
Risk Taking	88

The survey also provides some measure of the impact the institute may have on the future professional activities of the participants. When asked, "Because of this Institute, do you feel you will be more likely to pursue any of the following in the future," some heartening answers were given by the 31 participants who responded to this question (Figure 6).

Figure 6 Interest in future professional activity as indicated by respondents

Potential Activity	Response %	Response Total
Involvement in my state library association	77.4	24
Involvement in PNLA	51.6	16
Involvement in the American Library Assoc. (ALA)	16.1	5
Management positions in libraries	58.1	18
Further academic education	35.5	11

Implications and plans for the future

Further follow-up on the professional progress of this first cohort will need to be made in order to determine the long-term benefits of the PNLA Leadership Institute. Initial evaluation and survey input indicate that the institute was successful in the short term. Further tracking of participants' professional activities and attitudes will reveal more useful information.

If survey response is any indicator, this is a group that will make a difference to the state and provincial associations to which they belong. An electronic discussion list has been set up for the group and participants are already using it to plan reunions and presentations at the 2005 PNLA conference in Sitka, Alaska, and at the Oregon Library Association conference in Portland. State and provincial representatives on the PNLA board are following up by contacting participants to see how their professional reentry is going.

For the time being, based upon participant and mentor responses, the PNLA board has decided that it will repeat the institute again in Fall 2006 with some significant changes:

- a new coordinator has stepped up (Mary DeWalt, Ada Community Library, Boise, Idaho),
- location will be moved to a more group-work conducive setting,
- costs for participants will be lowered through increased corporate sponsorship and/or grant funding,
- the years of experience span may need to be narrowed,
- more Canadian participation will be solicited to further enrich the diversity of the institute,
- advertising and marketing will need to be increased.

PNLA's time and effort in delivering a leadership development option for the Pacific Northwest have born healthy fruit, it appears, and the association's commitment to serving the needs of the region in this area of professional concern will continue.

References

- ¹ Riggs, D. E. The crisis and opportunities in library leadership. *Journal of Library Administration* 2001, 32 (3/4), 5-17.
- ² Li, Haipeng. Le. Leadership: an international perspective. *Journal of Library Administration* 2001, 32 (3/4), 177-195.
- ³ Chaleff, I. *The Courageous Follower: Standing Up To and For Our Leaders*. San Francisco: Berrett-Koehler Publishers, 1998.
- ⁴ Bennis, W. *On Becoming a Leader*. Reading, Mass: Addison-Wesley Publishing, 1989.
- ⁵ Thomas, G. Building bridges: LIASA and leadership development in South Africa. *IFLA Journal* 2002, 28 (5/6), 298-307.
- ⁶ Dawson, D. Leadership development in libraries. *Aplis* 2002, 15 (4), 155-159.

⁷ Pacific Northwest Library Association. (2004) *Mission and Goals*. URL
<<http://www.pnla.org>>

⁸ Fraser, L., Appel, E. & Shaw, K. *Summary of Findings on Leadership Institutes Prepared for the Pacific Northwest Library Association*. [Unpublished]. February 2003.

WHERE TO FROM HERE? CONTINUING PROFESSIONAL DEVELOPMENT IN NEW ZEALAND

Amanda Cossham, Alison Fields and Gillian Oliver

School of Information and Social Sciences,

The Open Polytechnic of New Zealand

Private Bag 31914

Lower Hutt

New Zealand

Amanda.Cossham@openpolytechnic.ac.nz

Alison.Fields@openpolytechnic.ac.nz

Gillian.Oliver@openpolytechnic.ac.nz

Abstract

This paper examines the current situation relating to continuing professional development (CPD) for librarians and other information management professionals in New Zealand. New Zealand has a lack of homogeneity as regards qualifications held by librarians, and consequently professional staff may have widely varying educational backgrounds ranging from undergraduate certificates to postgraduate master's degrees. There is no formal requirement on the part of New Zealand's library association for librarians to undertake CPD in order to achieve or maintain professional status. The New Zealand government is currently formulating a national digital strategy, which has implications for the provision of library services. New Zealand librarians need therefore to have access to CPD to ensure that they are able to meet the demands of a digital society. However, given the relatively small population, the lack of a formal requirement for CPD, and a lack of clarity surrounding professional qualification and position status, CPD provision tends to be sporadic and limited to one or two urban centres. This paper is informed by research literature and experiences developing professional information management qualifications including feedback from employers, students and practitioners.

Introduction

This paper examines the current situation relating to continuing professional development (CPD) for information managers in New Zealand. The first part begins with a definition of terms used in this paper, provides background information about the country, and details educational requirements for information managers. The role of professional associations is also considered. The second part describes current government initiatives and strategies that will impact on the role of the information manager. The final part considers the requirements for CPD in New Zealand.

Definition of terms

'Information manager' is used as a comprehensive term to include librarians, records managers and archivists.

'Continuing professional development' (CPD) is defined as: "The continuing education of persons within a category or type of employment. It may consist in the upgrading of skills or learning through courses or individual learning. Where professions have expanded, professional development may involve doing new courses ...".¹

Niemi suggests that professionals seek educational opportunities from four sources: institutions of higher education, professional associations, independent (proprietary) agencies,

and agencies which employ these professionals, but notes that this last source is more likely to be concerned with the needs of the organisation than the needs of the professional.² To this list can be added more informally constituted and organic communities of practice. This framework will be used to assist in the evaluation of the CPD available in New Zealand.

Determining what CPD is offered, what information managers undertake, and what they might still need, depends very much on the interpretation of CPD. Where gaps are present between what is thought of as 'CPD' by practitioners, employers, education providers, and professional associations, discrepancies and failures to meet needs or expectations can arise. However, there is no doubt about the importance of CPD; "Maintaining competence and learning new skills must be at the top of every professional's 'To Do' list. It is an ethical responsibility ... but also one that is pragmatic and critical for career success".³

Background

New Zealand is a country with a relatively small population (4 million), with large concentrations of population in five main urban centres, Auckland being the largest with around 1 million. Auckland is about 1 hour's flying time from other North Island cities, and about 700 km from Wellington, the nation's capital. The North Island is more heavily populated than the South, leading to a concentration of services in the North and relatively little in the South. New Zealand has a well-developed information infrastructure and has been compared to Finland in terms of its economic growth capabilities.⁴ A 2002 survey showed that New Zealand scored relatively poorly in areas relating to innovation, but suggests that "... New Zealand has the potential to advance to an innovation-driven high-income economy over the next decade".⁵ Government policy in New Zealand recognizes the existence of two cultures – the indigenous culture (Maori) and the culture of the colonisers (Pakeha). The principles of the Treaty of Waitangi, signed in 1840 by over 500 Maori chiefs and a representative of the British Crown are of key importance to the development of New Zealand society.⁶ The existence of the Treaty and the consequent significance accorded to bicultural considerations is apparent in many aspects of New Zealand life, but particularly in public sector institutions.

The number of people currently working within information management is difficult to quantify. In library contexts in New Zealand, while it is estimated that there are around 7,000 to 8,000 people working in this area, there are only around 1000 individual and 500 institutional members of LIANZA, the professional organisation.⁷ 2001 census figures indicate that there are 1400 individuals who identify as working in records management. It is not known how many people currently work in the area of archives.

Education

Formal education for librarians in New Zealand was first offered in the 1940s and since this time has consisted of two programmes offered in parallel– one at undergraduate level and one at postgraduate level.⁸ The qualifications awarded for these two programmes have varied over the years, but currently the postgraduate qualification is a Master's degree offered by Victoria University of Wellington (VUW). There are several undergraduate qualifications, including two undergraduate diplomas and two bachelor degrees offered by The Open Polytechnic of New Zealand. Unlike Australia,⁹ which has established a paraprofessional position of 'library technician', a clear and explicit linkage between qualification and professional status has not been established in New Zealand. Consequently, there is no single qualification level clearly associated with the occupation of 'librarian', and terms such as 'librarian', 'assistant librarian' and 'library assistant' may refer to different

levels in different library sectors. Therefore, when planning or providing CPD an educational level common to all participants cannot be assumed.

Formal education opportunities for records managers and archivists have been more scattered. Until 2001 there was no records management qualification available beyond a one paper short course which has now ceased, and an archival qualification which has also ceased. New Zealanders wanting a full qualification in records management or archives have had to travel overseas, study by distance from an overseas institution, or qualify in a related field (librarianship, information management) and then gain on-the-job experience. Single papers in archives and records management have been available through the MLIS programme at VUW since the early 1990s. In 2001 The Open Polytechnic established an undergraduate diploma, and VUW established a post-graduate certificate and diploma in Archives and Records Management in 2004.

Because of the absence of a substantial New Zealand records or archives qualification until very recently, continuing professional development opportunities have been hugely important. By default, any course offered in the relevant area was CPD rather than a qualification and archivists and records managers relied on picking up courses from wherever they could in order to meet their learning needs.

Professional associations

The information management professions in New Zealand have many professional associations. The largest professional association for librarians is the Library and Information Association of New Zealand Aotearoa (LIANZA). There is also a Maori information workers' association, Te Ropu Whakahau - Maori in Libraries and Information Management (TRW). LIANZA has a partnership with TRW; it also caters to a range of special interest groups such as special libraries, cataloguing librarians, and research. However, there is a separate association for school librarians (SLANZA) and another for law librarians (NZLLG); records managers and archivists have the RMAA (Records Managers Association of Australasia), ARANZ (Archives and Records Association of New Zealand) and the NZSA (New Zealand Society of Archivists).¹⁰

Of all these associations, only RMAA has established a framework for recognition of professional membership, with a requirement for ongoing professional development.¹¹ As RMAA is in essence an Australian association this is perhaps not surprising. The Australian Library and Information Association (ALIA) has had a policy on continuing professional development since 1995, and has recently introduced a compliance scheme which allows for formal acknowledgment of CPD by members.¹²

None of the other New Zealand associations listed above require their members to achieve and maintain a level of professional membership. There are no requirements for members to have a qualification, a designated level of experience, or to undertake any kind of CPD. Individuals may join LIANZA (for example) without a library qualification, and maintain their membership without undertaking any education or CPD. The lack of formal recognition of CPD disadvantages New Zealand information managers wishing to work overseas.

LIANZA does have two professional categories of membership, associate and fellow, but these do not function in the same way as professional membership does in many other associations. An associate is defined as "a personal member of the Association who has demonstrated the knowledge, skills, judgement, attitude and commitment of a professional librarian and/or information manager".¹³ Members need to apply and be interviewed for this award, and meet peer reviewed criteria for involvement and achievement. It is a higher award than the Associate status with ALIA, and only 10-15 awards for Associate are awarded

annually. It is important to note that once the status of Associate is awarded, there is no further review process to ensure that knowledge and skills are maintained. Fellowships are honorary awards, given for “significant contribution to the advancement of librarianship and/or information management through a sustained record of achievements, or who has demonstrated outstanding qualities of leadership, teaching or research”.¹⁴

The absence of a professional level of membership requiring ongoing maintenance has long been acknowledged as an area to be considered. LIANZA council has a portfolio for Continuing Professional Development amongst others, but at the time of writing the issue of a membership status which requires ongoing CPD has not been fully addressed. Part of the equation in requiring information managers to maintain their standing with ongoing CPD is that there needs to be suitable CPD available for members. While there is a wide range of offerings, these can vary from in quality and in frequency and they are not available equally throughout the country. They are very often the result of the enthusiasm of a current committee, whereas another committee may not offer the same – or anything at all. The aspect of what is offered in CPD is looked at in more detail in the final part of this paper.

There are a range of scholarships and awards available to assist with CPD. These are available from many of the professional associations covered in this paper, and include such things as conference sponsorships, LIANZA’s Edith Jessie Carnell travelling scholarship, and HIANZ’s Margaret Gibson-Smith education scholarship.

Government

Both central and local government have launched e-government strategies. The goal of the central government strategy was that by 2004 the public sector in New Zealand would be working as a single, integrated operation.¹⁵ This has critical implications for management of knowledge and information in this sector. Building on this, in 2004 the National Digital Strategy was written and launched, initially for consultation and feedback from a wide range of sectors (education, government – both central and local –, business, and information and cultural industries). The strategy’s vision is that:

New Zealand will be a world leader at using information and technology to realise our economic, social and cultural goals. All New Zealanders will benefit from the power of information and communications technology (ICT) to harness information for economic and social gain. This will result in changes in government, businesses, communities and society as a whole.¹⁶

The key areas of emphasis include:

- improving access to New Zealand content, such as national heritage collections and government information; developing the digital confidence and capability of all New Zealanders,
- ensuring the ICT environment is trusted, secure and reliable,
- supporting grassroots developments to build the ICT capability of communities,
- increasing the potential of ICT to create value for businesses in all sectors,
- using ICT to improve the delivery of government services to citizens, particularly in health and education.¹⁷

The digital strategy focuses on three interrelated ‘areas for action’:

1. content – information made available via digital networks,
2. confidence and capability – the necessary skills to use ICT effectively,
3. connection – affordable access to ICT infrastructure such as telecommunications networks, computers and mobile phones.¹⁸

The strategy looks at how to connect all New Zealanders through affordable and better ICT infrastructure, with the delivery of such infrastructure directly to individuals, and indirectly through public libraries and citizens' advice bureaux. It provides for the development of digital content – the digitisation of a wide range of resources, including those held in libraries as well as government publications, and it defines the 'confidence and capability' required – with the outcome being "All New Zealanders will have the necessary literacy skills to maximise their opportunities using digital means".¹⁸

While the skills of librarians will be in demand for the development and promotion of digital content, it is 'confidence and capability' that has a particular impact on CPD requirements. With challenges presented such as co-ordinated delivery of quality training, appropriate training, training programmes for the disadvantaged and "clear guidance in the skills sets and qualifications required in the new IT trade skills...",¹⁸ there is considerable scope for librarians to offer their professional skills to meet these needs.

The feedback on the strategy from the information industries highlighted the need for sound information literacy and ICT skills, and for ongoing professional development. These were necessary in order to ensure the right people are developing the required skills in order to deliver both the end product to the end user and to produce the digital content and the extensive connection required. Also of key concern is the archiving of digital content, and the impact on the nation's memory if this is not addressed.¹⁹

Although one of the criticisms of the strategy is that it does not take the end user into consideration sufficiently, the feedback identified ways to improve this through the upskilling of individuals and professions as a whole to enable and enhance delivery of the strategy. There is, at this point, an insufficient number of suitably skilled individuals to support such widespread developments, whether it be in the area of how to digitise, or in how to use the end products of digitisation. The LIANZA submission on the digital strategy gave it qualified support, noting at one point that:

LIANZA agrees with the action concerning the role of 'infomediaries' helping the community to access content, but questions 'What skills are required?'. Search for government information – or for general well being information – booking holidays and writing CVs?²⁰

The LIANZA submission also emphasised the importance of literacy, information literacy and ICT generally, and indicated a number of additional key issues that needed to be considered in the strategy. These included:

Recognition of information management skills as crucial i.e. the role of librarians and librarianship in organising digital information; recognition of the role and skills infomediaries have (the human factor) to help those without access to ICT or unable to use ICT to find information online or by other means i.e. the role of librarians and librarianship in dissemination of digital information;...the ICT training of frontline information intermediaries in the 'community' as crucial in places such as school libraries, public libraries, citizen advice bureaux.

The specific actions they recommended include:

- development of school librarians to equip them to teach information literacy within schools,
- the training of frontline public library staff in small libraries,
- the increase of government funding for the Diploma in Maori Information Management at Te Wananga O Raukawa at Otaki to help facilitate more trained Maori infomediaries.²⁰

Previous studies

Few studies into the area of CPD for information managers have been undertaken in New Zealand. Two recent studies conducted in the area of information management consultants and contractors as well as records managers are discussed below, together with a consideration of the overall state of CPD for librarians. Other evidence of the need for CPD is also discussed.

A study was conducted in 2001 of consultants and contractors in the information industry in New Zealand, covering librarians, records managers, archivists, information managers and knowledge managers.²¹ Although this represents only one sector of information managers, trends may be similar throughout other sectors. The survey undertook to discover how this group operates on a number of levels, and amongst the questions asked were some on professional standards and support.

Topics of professional development and professional support were both addressed and the replies indicate a strong area of overlap. Many sources of professional development simultaneously generated professional support, and vice versa. Without exception, all interviewees said professional development was a necessary and important area of their work and business. For those seeking professional development, the methods outlined in Table 1 show the relative popularity of the available methods.

Table 1 Strategies employed to maintain professional development and support by information management consultants and contractors.²¹

Type of activity	Professional development	Professional support
Listservs and mailing lists	18%	42%
Professional reading	18%	-
Conferences	16%	-
Networking	11%	21%
Professional associations and organisations	8%	37%
Meetings, speakers, etc	7%	-
Other	21%	-

A range of professional development avenues is used to cater for the needs of this diverse group. No single item scored above twenty per cent in the 'professional development' category, confirming the need for a range of activities rather than a focus on a single aspect. The category of 'other' includes regular industry contacts, the Internet, formal study and involvement in the wider profession. It is interesting to note that professional support centres on listservs, networking and a range of professional associations, all of which have people at the core. It appears to be the interaction and sharing that people in these sectors value and seek out. Others noted that there already exist many opportunities for professional development and professional support, and that it was the responsibility of the individual to find and make use of the existing services.

In 2002 records managers were surveyed to find out what sorts of qualifications they had (if any) and what sorts of continuing professional development or substitute for qualification they had undertaken. Participation in continuing education (defined in the survey as short courses, workshops, seminars, conferences, training, etc) varied enormously. The largest group of respondents 31.5% (28/89) attended once a year or less, 11% (10/89) participated in continuing education of all types including overseas conferences more than three times a year, and 13.5% (12/89) do not attend any.²²

The results showed that while there had been a dearth of qualifications available in NZ, there was considerable interest in CPD, and that professional associations had provided a great deal of what had been offered. There was a wide range of events listed including all of those in the definition, and in addition courses from tertiary institutions (which had previously been listed as qualifications as well),²² generic business skills and computer courses. Archives New Zealand training courses for local government records managers were listed by 20 out of the 89 respondents (partly due to the high percentage of local government records managers participating in the survey). ARMA and ARANZ conferences, seminars, meetings and workshops were next most listed - by 17 and 16 respondents respectively. The fourth most listed, and the only other group in double figures, was courses offered by SWIM Ltd, a private consultancy and training firm (11 respondents).²³ Other sources of CPD were queried, and rated as follows: websites (69/89 respondents), professional literature and listservs (61/89 each) and networking (58/89).

In addition, records managers had made good use of what their employer offered in the way of computer application training, business and management skills and HR courses, Te reo Maori (Maori language), biculturalism and Treaty of Waitangi. This seems to bear out Niemi's assertion that while agencies which employ professionals provide continuing education, it is more likely to be concerned with the needs of the organisation than the needs of the professional, however relevant the courses are to the individual.²³

The monthly magazine of LIANZA, *Library life Te rau ora*, focused on professional development in the December 2000 issue.²⁴ It considered both qualifications and CPD; one article examined the state of CPD in New Zealand, and the establishment and initial work of a Professional Development Standing Committee, but asked more questions than it answered.²⁵ Initial recommendations of the Committee included;

- promotion of CPD in regions and by special interest groups within LIANZA,
- an expanded web-based calendar of events,
- an improved structure of representation on tertiary providers' advisory boards,
- improved communication on CPD throughout the association.

While the first of these recommendations seems to have been successful (as is evidenced by announcements of activities on listservs), it is hard to establish whether the others were undertaken. There does not seem to have been a themed issue on this topic before or since.

Other evidence of the need and use for CPD has been gleaned from such sources as feedback from students in tertiary level courses, many of whom are upgrading their qualifications, perhaps from a perceived need to upskill. Feedback from stakeholders is often solicited when developing new courses and qualifications, such as the Certificate in Cataloguing offered by The Open Polytechnic of New Zealand. There appears to be wide interest in some of the courses being offered, with some students coming in with existing qualifications and employers also interested in the availability of these courses.

Types of CPD

A wide range of CPD is available for those who seek it. As Niemi points out, professionals seek educational opportunities from four sources: institutions of higher education, professional associations, independent (proprietary) agencies, and agencies which employ these professionals.²⁶ There are also more informally constituted and organic communities of practice, of which listservs are a good example.

The needs of a particular group within information management may well differ from other groups, for a variety of reasons including the type of work undertaken, changes to their traditional roles, and advances in technology. The needs of individuals within each group may

also differ due to the background of the individual, their particular tasks and interests, previous training, etc. The matching of CPD to individual people and to groups may sometimes be obvious but seldom results in training that suits all needs.

CPD offerings

The CPD currently on offer for information managers in New Zealand includes a wide range of choices that can be categorised using Niemi's framework. These are outlined below, and while these do not constitute all of the CDP opportunities currently available in New Zealand, they provide an overview of the types on offer.

Institutions of higher learning such as the VUW and The Open Polytechnic of New Zealand offer formal courses contributing towards undergraduate or postgraduate qualifications, as discussed earlier. VUW also offers some of its courses that can be taken singly as Certificates of Proficiency. There are also some tertiary institutions which offer courses in other subjects which have relevance to many in information management, including courses and qualifications in Maori information management, business, management, and communication.

Professional associations also provide a range of CPD opportunities. LIANZA provides, hosts, develops or organises a wide variety of CPD for its members and other librarians. At one stage in the early 1990s the Association had a dedicated CPD position, whereby CPD was organised, advertised and toured, making it available in as many centres as practical. This position lasted only a short time, and the Professional Development portfolio on the LIANZA council has since picked up a portion of this role. Each of the LIANZA regions and special interest groups also develops, organises or hosts some CPD each year, but the amount and quality of this depends greatly on the resources available in each region and the ability of the regional committees to provide support.

CPD is also offered on a similar basis by other professional associations for information managers, including SLANZA, NZLLG, RMAA, ARANZ and NZSA. Each association hosts its own conferences, usually on an annual basis, and this often forms the core of CPD opportunities, with other offerings being made sporadically throughout the year. Several of the LIANZA regions now also hold weekend schools for members in their areas, run as mini-conferences or sets of workshops. The result of this is an uneven spread of CPD opportunities across the country, although it can be argued that concentrations of CPD in the areas where it is most needed may result.

There is a small number of proprietary agencies which also provide CPD opportunities, the largest of these being SWIM, a records consultancy company which regularly delivers short courses and seminars in records and information management topics in Wellington and Auckland.

Agencies that employ information managers also provide training opportunities that can be classed as CPD. These may extend from courses developed and delivered by Archives New Zealand and the National Library of New Zealand with a focus on industry-specific and discipline-related subjects to local government and tertiary education employers who may host courses such as understanding Maoritanga or dealing with customers.

Beyond Niemi's framework are the communities of practice that may evolve their own CPD offerings as need and opportunity arise. Examples of this include Rose Holley's presentation on her own CPD to her workplace (a university library), which was then taken up by the Cataloguing Special Interest Group of LIANZA and presented to members as part of their annual cataloguing seminar.²⁷ Listservs, weblogs and mailing lists come into this category, providing a group forum for the exchange and discussion of ideas and practices. These are widely used through all information management sectors in New Zealand.

Networking and maintaining industry contacts also comes into this category, and along with professional reading, research and writing, and mentoring, is one of the categories where the onus is largely on the individual to organise.

Where to from here?

Despite the absence of a regulated programme of continuing professional development, there is still a lot on offer in New Zealand for the librarian, records manager or archivist. The surveys by both Fields and Cossham indicate that "... there already exist many opportunities for professional development and professional support, and that it was the responsibility of the individual to find and make use of the existing services".²¹

Although a wide range of CPD opportunities are available for information managers in New Zealand, many of these are available only in some geographic regions, at some times, or in some delivery modes. The quality and value of these opportunities also varies greatly.

The ability of individuals to participate in the available CPD is dependent on a number of factors, including motivation to seek opportunities and participate in them, the level and currency of their own qualifications (if any), their area of speciality, the timing and location of the CPD opportunities, workplace culture, and support from employers. Cost is still an important factor for many individuals, especially when the employer does not perceive the need for CPD beyond the in-house programmes. It is partly because they are inexpensive that the regional LIANZA CPD programmes and RMAA programmes are well attended.

In some respects, the seeking of CPD from other avenues is also an indication of the breadth of experience and range of types of work which information managers are required to perform. Traditional skills are insufficient, regardless of the sector in which the librarian is employed, while records managers and archivists face significant and complex changes in technology. While fundamental developments in information technology are an obvious variation and perhaps the variation most easily satisfied by courses offered externally to the profession, other changes such as legislative change, developments in access to electronic information, electronic documents, knowledge management, or information literacy can also be satisfied by external sources. The changing roles of information managers within organisations, the evolving nature of publications, the changing expectations of the borrowers/users, and the sheer speed of change of many of these variables mean that CPD must cover both the profession specific developments, and a wider range of external influences.

As well as the obvious task of providing such continuing education, a key role for professional associations is to inform their members of where it can be found and to promote its benefits. Ongoing research and continuing dialogue with key stakeholders will help ensure that CPD opportunities are created and delivered, and that they are relevant, useful, and contribute to the ongoing development of New Zealand's information managers.

References

¹ *The Penguin Macquarie Dictionary of Australian Education*. Ringwood: Penguin, 1989. p256.

² Niemi, J.A., Human resources management. In: Tuijnman, C. (ed.) *International Encyclopedia of Adult Education and Training*, Oxford: Elsevier, 1996: p72.

³ Weingand, D.E., Describing the elephant: what is continuing professional education?' 65th IFLA Council and General Conference, Bangkok, Thailand, August 20-August 28, 1999. URL <<http://www.ifla.org/IV/ifla65/papers/089-104e.htm>>

- ⁴ Watson, R., & Myers, M.D., IT industry success in small countries: the cases of Finland and New Zealand. In: Tan, F. B. (ed.) *Cases on Global IT Applications and Management: Successes and Pitfalls*. Hershey: Idea, 2002: pp226-250.
- ⁵ Schoefisch, U. The New Zealand economy and the growth debate. *Paper for Knowledge Wave 2003, The Leadership Forum*. Deutsche Bank, 2003. URL <http://www.knowledgewave.org.nz/forum_2003/background_reading/Knowledgewave2003.pdf>
- ⁶ Orange, *The Treaty of Waitangi*. Wellington: Allen and Unwin, 1987.
- ⁷ LIANZA, *Annual Report 2003-2004*. Wellington, New Zealand: LIANZA, 2004. URL <http://www.lianza.org.nz/profile/LIANZA_Annual_Report_2004.pdf>
- ⁸ Richardson, A., rev. Oliver, G. Education for librarianship. In: McCahon, R. & Oliver, G. (eds) *Informing New Zealand : Libraries, Archives, and Museums = Hei Puna Whakamohio mo Aotearoa : Whare Pukapuka, Puranga Korero, Whare Taonga*. 4th ed. Lower Hutt: Open Mind, 2000: pp23-31.
- ⁹ Australian Library and Information Association, (2004). *Personal Membership*. URL <<http://alia.org.au/membership.benefits/personal.html>>
- ¹⁰ Information from the NZSA in a letter to members, 10 December 2004, indicates that it is considering dissolving in 2005.
- ¹¹ RMAA, *Continuing Professional Development Scheme*.
- ¹² Fennessy, G., Continuing professional development in Australian health libraries. *Health Libraries Review* 1999, 16, 249-255.
- ¹³ LIANZA, *Code of Practice*, s14.3. URL <http://www.lianza.org.nz/cop/code_1A.shtml>
- ¹⁴ LIANZA, *Code of practice*, s. 14.4.
- ¹⁵ New Zealand, *e-government in New Zealand. Executive Summary: e-government Strategy Update December 2001*. URL <<http://www.e-government.govt.nz/docs/e-gov-strategy-dec-01-exec/index.html>>
- ¹⁶ New Zealand, *Digital Strategy: A Draft New Zealand Digital Strategy for Consultation*. Wellington: Ministry of Economic Development, 2004. URL <<http://www.med.govt.nz/pbt/infotech/digital-strategy/draft/index.html>>
- ¹⁷ Cunliffe, D., (2004) *Digital Strategy Proposes New Directions For ICT*. URL <<http://www.Beehive.govt.nz/ViewDocument.cfm?DocumentID=19980>>
- ¹⁸ New Zealand, *Digital Strategy*, 3.
- ¹⁹ Some of this feedback has been made available on the National Library of New Zealand's website at <http://www.natlib.govt.nz/en/digital/1digitalstrategy.html#strategy>; the authors understand that more will be made public in time.
- ²⁰ LIANZA. *Submission on Digital Strategy*. URL <http://www.lianza.org.nz/newsevents/Digital_Strategy.pdf> 3.
- ²¹ Fields, A., Consultancy and contract work: perspectives from New Zealand. *Australian Library Journal* 2003, 52 (1), 31-44.
- ²² This would seem to indicate either that respondents were unclear of the exact definition of a qualification (one course is not a qualification), or that they viewed continuing education as anything past their initial qualification which was job related.
- ²³ Cossham, A.F., *The Professional Development Needs of New Zealand's Records Managers*. Lower Hutt: The Open Polytechnic of New Zealand, 2004. Working papers, no. 4-04.
- ²⁴ *Library Life Te rau ora* 2000, 252.
- ²⁵ Tocker, L., State of CPD in NZ! *Library Life* 2000, 252, 9.
- ²⁶ Nieme, J.A. Human resources management. In: Tuijnman, C. (ed.) *International Encyclopedia of Adult Education and Training*, Oxford: Elsevier, 1996: p72.

²⁷ Holley, R., Chocolate fish: Rose's notebook. *LIANZA CatSIG Seminar, December 8th, 2003, Auckland*. URL <<http://www.lianza.org.nz/sigs/sig-catsig.shtml>>

INTERNATIONAL PARTNERSHIP, NATIONAL IMPACT: THE SOUTH AFRICAN LIBRARY LEADERSHIP PROJECT

Ujala Satgoor

SALLP Project Coordinator,
Library and Information Association of South Africa
u.satgoor@liasa.org.za

Susan Schnuer

Assistant Director,
Mortenson Centre for International Library Programmes,
University of Illinois, U.S.A.
schnuer@uiuc.edu

Abstract

This paper reviews the elements of a successful international partnership that led to the development, implementation, and evaluation of the South African Library Leadership Project (SALLP). This innovative project, funded by the Mellon Foundation, was managed jointly by the Library and Information Association of South Africa (LIASA) and the Mortenson Centre for International Library Programmes at the University of Illinois at Urbana-Champaign. The SALLP, begun in June 2001, will be completed by December 2004. The goals of the SALLP are to develop leadership qualities, to refine communication and advocacy skills, to highlight best practices and future trends in the management of library services, and to learn about change management and organization structures. Twenty-three South African librarians, senior and middle managers of academic and public libraries, have participated in this professional development programme, which took place both in South Africa and the United States. The strengths and weaknesses of the project and its outcomes are discussed. The paper also explores aspects of the joint management of an international professional development programme. This includes opportunities for developing partnerships, elements of a successful partnership, funding and budgeting strategies, and sustainability.

Introduction

The South African Library Leadership Project (SALLP) is an example of a successful international partnership. This paper aims to highlight the theoretical and experiential elements, criteria and competencies that resulted in this project. Much has been written about partnerships in general and library partnerships specifically. There is some confusion about the term 'partnership' and it is used interchangeably with related terms such as networking, collaborations and cooperation. For the purposes of this paper the following definition of 'partnership' is used: "a relationship in which people or organizations work together with equal status".¹ The following African proverb succinctly captures the essence of a great partnership:

If you want to go fast, go alone. If you want to go far, go together.

The unique elements of a successful partnership may vary from organization to organization. In 2001 Mattessich, Murray-Close, and Monsey² studied and analyzed research on partnerships and identified 20 factors common to successful partnerships. In terms of a desirable environment key factors are:

- a history of collaboration or cooperation in the community,

- the collaborative group is seen as a legitimate community leader,
- a favorable political and social climate.

For the SALLP project, the second and the third of these factors were particularly important. The partners were recognized as being leaders in the field and the timing was right, both financially and politically.

In terms of membership characteristics there has to be mutual respect, understanding and trust along with an appropriate cross-section of members. These members also needed to see collaboration as in their self-interest and be able to compromise. According to this study, the concept of mutual respect, understanding and trust emerged as the most mentioned success factor. It was one of the most critical elements in the SALLP partnership.

With the process and structure members share a stake in both. There need to be multiple layers of participation where features of flexibility and adaptability were present. Clear roles and policy guidelines are necessary with an appropriate pace of development. 'Ownership of the project' is a recurring theme in SALLP and was crucial to the success of the project.

In terms of communication it was important to have open and frequent communication as well as informal relationships and communications links. Communication probably emerged as the most critical, delicate, and complex of the key elements. Talking about money or management issues is never easy and in a cross cultural context can be very difficult. Informal communication channels were critical to overcoming potential areas of conflict.

Regarding purpose the vision should be shared with concrete, attainable goals and objectives and a unique purpose. It was, at times, difficult to remain focused on the shared vision of the project. A strong evaluative component allowed the administrators of the project to reexamine the shared vision and to refine the goals as the project progressed. Necessary resources include sufficient funds, staff, materials and time. Skilled leadership should be present, and with the generous support of the Mellon Foundation and the strong administration team in each partner, the project moved forward successfully. Wildridge et al in a 2004 review article on research into partnerships mention an interesting staff trait that helps build successful partnerships:

A further key staff attribute is seen to be skills in working across professional, organizational, or other boundaries...The surmounting of boundary lines is a success factor, while failure to do so can quickly create a barrier to success.³

Although boundaries serve as guidelines in the initial stages, the partnership process is constantly evolving. The ability to negotiate and revisit boundaries requires skillful handling and mutual flexibility and agreement. Mutual respect and a willingness to learn can also be added to the above success factors. Mutual respect is required for cultural differences and an understanding of local conditions and needs. Every organization has its own culture that is built over time, based on its mission, its practices, its people, its governing values, its traditions, and its institutional history. In any partnership situation, it is important to acknowledge and understand these different organizational cultures, to respect them, and to find ways that these realities can contribute to strengthening the mutual endeavour. A willingness to learn how to operate in a different environment is key. This includes the acknowledgement of local expertise and consultation with a wide range of individuals and/or groups who live in and intimately know local conditions. The most successful partnerships recognize and value their differences and find ways to integrate them into a workable overarching partnership culture.

As more countries explore opportunities for partnerships, potential partners should make informed decisions based on fact and not assumptions. For cross-cultural partnership development, initiatives may include site visits, interviews, sector consultations, etc. Political

correctness necessitates an awareness of cultural norms, gender and race sensitivity and socio-political understanding.

Breaking down the obstacles

Major obstacles to a constructive and successful partnership include;

- conflict over key interests;
- a lack of clear purpose;
- unrealistic goals or deadlines; key interests and stakeholders, including decision makers, who are not included or refuse to participate;
- unequal benefits for the partners;
- some participants having more power than others;
- financial and time commitments that outweigh potential benefits;
- partnership members who are uncomfortable with the commitments required;
- constitutional issues or legal precedents which constrain the partnership.

The ability to identify areas of potential conflict at the outset of a project and the sensitive handling of obstacles when and if these do arise, are essential skills that help to prevent the dissolution of a potentially effective partnership.

Celebrating success

Successful partnerships look for every opportunity to celebrate individual project successes or key benchmarks in the evolution of the partnership. Such celebrations allow the partners to recognize good work being done that re-enforces the goals of the partnership; to gain some outside recognition of the partnership; and/or to demonstrate possibilities for the partnership to grow. Recognizing and celebrating accomplishments helps motivate participants to meet new challenges. It is a lost opportunity when it does not occur. If one's goal is to build greater awareness of the partnership, then the partners need to take every opportunity to legitimately celebrate each other's success. The ethos of this partnership extended beyond the SALLP and achievements such as the awarding of the bid to LIASA to host the 2007 IFLA/WLIC and the awarding of various grants to the Mortenson Centre were celebrated by each unreservedly. In this paper the success factors will emerge as the foundation of this particular project. Partnerships develop over time and the SALLP partnership continues to grow and evolve as needs and focus change. Looking back over the past four years, there are elements that emerge as significant in the building of this partnership.

The South African Library Leadership Project (SALLP)

This innovative project, funded by the Andrew W Mellon Foundation, was managed jointly by the Library and Information Association of South Africa (LIASA) and the Mortenson Centre for International Library Programmes at the University of Illinois, Urbana-Champaign. It ran from January 1, 2001 to June 30, 2004. The success of the initial project and the need for more training of this calibre resulted in a further grant being awarded by the Mellon Foundation. This final phase of the project, which terminated on December 30, 2004, focused on the development of librarians who are actively involved within the leadership structures of LIASA and who are committed to the development of the profession and the Library Association.

There were two main goals. Goal 1 was concerned with implementing a leadership programme for promising future managers from academic and public libraries. Twenty three librarians representing senior and middle managers of public and academic library services were selected through an open, merit process for participation in a 6-8 week leadership

training programme at the Mortenson Centre. They now constitute a national resource pool of LIS professionals who are making a noticeable impact upon LIASA and the profession.

Goal 2 was to locate a continuing education facility within LIASA. In 2002 the University of Cape Town conducted a preliminary survey of training needs of local library and information services (LIS) workers for LIASA and identified four focus areas, namely, Personal Development; Professional & Support Skills Development; ICT, and Management & Leadership Development. LIASA then identified Continuing Education and Professional Development (CEPD) as one of its strategic objectives within its business plan. The then Project Director and SALLP Co-ordinator worked on a framework with local experts in this regard. Subsequently, the Project Coordinator, in consultation with the staff of the Mortenson Centre, developed a proposal which was submitted to the Carnegie Corporation of New York in 2003 for the establishment of the Centre for Information Career Development (CICD).

The partners

LIASA and the Mortenson Centre worked closely together in the development and implementation of this project. These two very different bodies came together with shared goals to work on the SALLP project and were assisted by the generous financial support of the Mellon Foundation. The Andrew W. Mellon Foundation (www.mellon.org) is a not-for-profit organization located in New York and makes grants in higher education, museums and art conservation, performing arts, conservation and the environment, and public affairs. The Foundation has been active in several countries including Central America and South Africa.

LIASA (www.liasa.org.za) was established in 1997 to unite and represent all the institutions and persons engaged in library and information services in South Africa. Its mission advocates and supports the provision of efficient, user-oriented and excellent library and information services that aspire to equitable access to information for all communities (literate and illiterate) in South Africa. LIASA has established 10 branches in the 9 provinces as well as nine specialist interest groups that meet both professional and working needs of the members. LIASA is inclusive of all types of libraries, represents all regions and is able to reach librarians in all parts of South Africa through its extensive infrastructure. It presently has 2027 members nationally and has the potential to grow to more than 5000 over the next three years. Income gleaned from individual, institutional and international members is utilized for the development of the branches and interest groups.

LIASA is now recognized as a not-for-profit professional organization and has, since its inception, played a major role in the LIS sector in South Africa. This includes advocacy and lobbying of government at local, provincial and national levels for improved library and information services to all communities in this country and representation on the National Council for Library and Information Services (NCLIS), with authoritative input on library policy and legislation. LIASA is developing its profile nationally and internationally and the awarding of the opportunity to host the 2007 IFLA/WLIC in South Africa affirms its representative role in the LIS profession in South Africa.

The Mortenson Centre for International Library Programmes (www.library.uiuc.edu/mortenson) was established in 1991 at the University of Illinois Library with the generous gift of Walter Mortenson, a University of Illinois graduate. The goal of the Centre, as Walter Mortenson expressed it, is to “promote international education, understanding and peace”. This unique Centre provides professional development programmes for librarians outside the United States. Since 1991 more than 600 librarians from 85 countries have participated in Centre programmes. By the mid-nineties, the Mortenson Centre staff realized that, in order to provide high-quality, appropriate professional development training programmes, the Centre needed to work closely with library organizations outside the United States. Partner

organizations worked with Mortenson Centre staff to develop programmes geared to meet the needs of librarians within their country or region. It now has partners in Russia, Colombia, Costa Rica, Haiti, Georgia, and Japan.

The Centre has a small, dynamic, and creative staff. While most of the professional development programmes take place at the Centre in the United States, the staff also travel to libraries around the world to discuss possibilities for future projects. The Centre has an excellent fundraising record and has worked to raise funds for its projects with foundations such as the Andrew Mellon Foundation, the Carnegie Corporation, Open Society Institute, and the MacArthur Foundation.

Five stages of partnership

Over the four years of the project, five distinct stages have emerged. *Stage 1* was primarily about developing the trust and being exploratory and fluid. Since 1996 the Mortenson Centre had, with funding from the Mellon Foundation, been working on establishing a centre for continuing education in Costa Rica. Several librarians from Central America had participated in this programme and the Mellon Foundation was pleased with the outcomes of the grant. The grant concluded in 1999 and the Mortenson Centre contacted the Mellon Foundation to determine their interest in funding this type of project in another country. The Mellon Foundation indicated that they were currently working in South Africa and would be willing, if the South African library community was interested, to consider another grant. The Foundation generously provided a small planning grant to the Mortenson Centre team for an exploratory visit. They also suggested that we should work closely with the current Mellon grantee, GAELIC, an academic library consortium in the Gauteng province. The GAELIC administrators were willing to help and set up an intensive set of one-week meetings for the Mortenson Centre team. Sixteen libraries in the Gauteng province were visited and presentations were made at each site. The goal was to provide information about the Mortenson Centre programme, to explain the possibility of a Mellon Foundation grant, and to gauge the interest of the library community in working with the Mortenson Centre.

While the presentations were quite useful in sharing information about the Mortenson Centre, the ensuing discussions were free-ranging and did not leave a strong sense of a united way forward. However, the week concluded with several intensive meetings with a group of librarians chosen for their leadership in the field. They represented the academic consortium GAELIC, LIASA, the public and school library sectors, NGOs, and the British Council. These discussions were fruitful and challenging at the same time, revolving around three main issues - trust, shared vision and establishing co-operation. Trust issues encompassed establishing reputations, understanding agendas and identifying management processes. Vision was about jointly establishing whether there was a need for a continuing education project for the South African library community along with the project's format and its important outcomes. Pragmatic issues like necessary resources, realistic expectations, project audience and the question of which library entity in South Africa would be the best partner for this project, drove the discussion on co-operation.

When the discussions ended the group recommended that the project proceed since it would be a good fit with Mortenson Centre expertise and the ability to meet the needs of the South African library community. The proposal was to be written jointly with the Mortenson Centre and a South African group assigned to work on the initial stages of the project. The project would focus on building nationally leadership skills for academic and public librarians. If the proposal was funded, the logical South African partner would be LIASA and a project coordinator would be hired and located within LIASA. A second goal of the project was to build a continuing education entity in LIASA.

Defining the project occurred in *Stage 2*. It was agreed that the Mortenson Centre staff would draft the first version of the proposal and send it to the South African team for review and changes. This stage of writing and revising the proposal lasted several months. Communication between partners was frequent and interesting as each partner would be left to ponder changes made in the proposal by the other. This stage was marked by two important principles. It was agreed there was a need to understand the political, cultural and administrative context of each partner. Alongside this was the recognition of the importance of developing shared ownership of the project.

At the end of Stage 2 emerged what proved to be a winning proposal. Most important, however, was the establishment of a common project of which both partners took ownership. Also during this stage organizational cultures begin to manifest themselves. The South Africans were most comfortable with a more formal governing structure for the project, whilst the Mortenson Centre did not feel a need to create an outside governing structure. The Mortenson Centre, using the University of Illinois grants and contracts system, had a much more bureaucratic and lengthy process for the submission of a proposal. These are just a couple of examples of some of the issues raised and the types of discussion needed to understand each other's context.

The project now entitled the South African Leadership Project (SALLP) began to take shape as important issues were debated and decided. The principal investigator on the project was the Mortenson Centre. This was because it had developed a good relationship with the funding agency, the Mellon Foundation. Also at that time (2000), the US dollar was much stronger than the South African Rand and, as a three-year project was envisaged, it made economic sense to keep the funds in dollars until they were needed in South Africa.

The first year of the three year project was the planning year and would allow us to launch the project and hire a SALLP project coordinator, set up the leadership programme, select the candidates, and generally work through various administrative issues. During the second and third years a group of South African librarians, selected by a panel in South Africa, would attend the Leadership programme. The programme itself consisted of three parts: a general orientation in South Africa, a six-eight week leadership institute in the United States, and follow-up training upon the return home. Agreement was reached on the amount of resources needed for the project and how the funds would be divided if they were awarded. The grant was awarded in December 2000.

Stage 3 revolved around managing the project and making it direct and focused. The first year of the implementation of SALLP was a crucial one as it set the tone and standard of operation. The timelines and draft project schedule was designed. The project co-ordinator was hired in June 2001 and the clock began ticking! Priority was given to open, frequent, and direct communication (and disagreement). South Africans are very conscious of representation and the consultative process. Aside from LIASA, the project governance structures were representative of the national, public and academic libraries, library schools and consortia. The presence of the sector leadership and of the partnering organizations clearly defined the purpose of the partnership and how the partners will measure and define success. As this was also the first major CEPD project, the general feeling was that it had to be done correctly. LIASA was the custodian of the project and accountable to the sector. With hindsight this has proven to be very effective as it garnered support from the sectors who would be beneficiaries of this project.

Although the formality of meetings and decision making was at first disconcerting to our American counterparts, it also served to broaden their understanding of how South Africans think and function. This awareness was then carried through in their handling of the participants during the training programme in the US. Whilst the identification of the goals

was led by the Mortenson Centre, the refining of the objectives and selection process was very much South African. The communication within this partnership was based on utilizing the strengths, experience and expertise of each partner in determining the most cost-effective approach and deciding who was best suited to accomplish specific tasks. The open lines of communication were also characterized by a flexible approach to the way in which needs and responsibilities were matched. The Mortenson Centre willingly shared their considerable programme experience and field of knowledge in determining the content of the training programme in the States, whilst fully respecting South African goals and interests. This was made possible by the ongoing dialogue and open communication which ranged from initial formality and politeness to current levels of comfort and spontaneity.

It was also important at this Stage 3 to find a way around the barriers. The management of a project such as this, involving two active partners on two different continents, will obviously throw up many barriers, not only between partners but also between partners and participants. The geographical distance, language, 'developed vs. developing' issues, resources, management styles, professional mindset and attitude, are some of the barriers that come to mind. Although libraries in South Africa have a more than 150-year history and, in comparison to many countries, a fairly sophisticated infrastructure which includes telecommunications, computer literacy, access to training facilities, awareness of current trends, and affiliations to international LIS organizations, this is not the universally prevalent situation. There are economically challenged areas that function with minimum resources and a strong sense of incapacitation exists amongst many LIS workers. The need to develop libraries and redefine the role of the library politically and socially is a challenge that continues to confront the profession. In the face of management and service delivery challenges, heads of library services recognise the importance for the development of future library leaders and further skills training of staff. Successful partnerships acknowledge and address these realities and take satisfaction in resolving them. This awareness informed the planning of the project. Addressing and resolving barriers at the outset helped in fostering a mutual environment of respect, integrity and co-ownership. At all times a strong professional attitude, trust and empathy permeated our relationship and became the foundation for all interaction. This was evident to all, and served to overcome challenges and/or perceived adversities. Rather than sticking to the formal rules as such, creative thinking and a practical 'hands-on' training programme was designed. Site visits, professional exchange, group discussions, individual meetings, a variety of teaching formats, mentoring and social down-time all contributed to a dynamic programme and elicited both tangible and intangible results from both participants and partners. Fortunately the synchronicity in thought and common purpose was recognised very early in the project and this prevented barriers from becoming entrenched.

This stage also included the importance of developing mutual respect and appreciation between the partners. Partnership work requires perseverance and 'follow through' by each participating organization and individual. It requires a shared commitment to each other's success. Progress depends on each person in the partnership honoring commitments and following up words with deeds. Successful partnerships address the realities of delays and non-delivery by putting in place reliable accountability measures and regular communication processes to ensure commitments and actions.

This international partnership resulted in an extremely interesting way of organising, planning and implementing the logistics of the project. An early realization that we were committed to high standards and professionalism, resulted in a mutually respectful environment. The South African approach was fully accepted by the Mortenson Centre and their participation was wholehearted. The US programme was designed in consultation with

the South African partners and arranged in a manner that was mutually acceptable. As financial matters can put a strain on any partnership, stringent budgets, fiscal management, and an understanding of financial reporting mechanisms were imperative. Funder confidence subsequently resulted in an additional grant being awarded for the SALLP. Overall, this unique donor funded project management process was synchronized with single minded focus. The SALLP may therefore be described as a project that was designed using United States [American] expertise, experience and processes to achieve uniquely identified South African goals and objectives.

Stage 4 was concerned with navigating with the group. Managing a group of people representing a wide range of sectors, backgrounds, experience, expertise and professional understanding, differing needs and priorities, for 6-8 weeks in a new environment is indeed a challenge. Our priority was to facilitate the transition from a group to a team, ensuring collaboration whilst in the US and sustainability upon return to South Africa, and the training programme was therefore designed to include flexibility to meet the needs of individuals. Coincidentally, each of the three groups that participated in the SALLP had unique experiences as the programme was refined each year. The absence of repetition and the challenge of new ideas and opportunities affirmed the life changing experiences of each participant.

A national pool of professionals committed to professional leadership and association development was one of the outcomes envisaged, and the realization of Goal 1 became apparent in 2004. In his analysis of the Project in 2003, an independent evaluator expressed the opinion that individuals should be prompted to take up the challenge of greater involvement within the Association in the future. The year 2004 was an election year for office bearers in LIASA and the impact of SALLP participation was felt at all levels. Sixteen of the twenty three SALLP participants were nominated and elected as office bearers on LIASA structures for the 2004 –2006 term. LIASA positions into which SALLP participants were elected range from the office of national president and three other national office bearers through to branch officers and members of the Representative Council to coordinators and convenors of interest groups.

In addition, national and regional professional awards and honours were made to, and achieved by a number of SALLP participants. These include awards in 2002 and 2004 of the LIASA-SabinetOnline Academic Librarian of the Year; a 2003 provincial Departmental Employee of the Year award; and a 2004 provincial Premier's Award for Excellence. Recognition of professional achievement has resulted in appointments to national bodies such as the Council for Higher Education Librarians in South Africa (CHELSA) and the NCLIS. For some, job promotions, new opportunities and further management development have occurred within their work environments. Most SALLP participants are now emerging as role models and serving as mentors to several young professionals.

Focusing on the future, being creative and reflective occurred in *Stage 5*. By the end of the lifespan of the SALLP on 31 December 2004, the original professional partnership had evolved into a relationship with considerable impact that is exploring opportunities for future collaborations. The term 'impact' describes a partnership's capacity to deliver tangible results and the creation of value and benefit for all partners. 'Common purpose' was identified as the core principle of a successful partnership. It is an acknowledgement that cooperation may be the best strategy for getting things done. People who share common interests and goodwill spend less time and energy in conflict and more time and energy tackling issues of common concern.

The immediate future

A partnership ultimately gains its stature and reputation based on the quality of the work it accomplishes. The most successful partnerships understand the importance of doing everything well. An early reputation for excellence and the ability to sustain that reputation are important factors in how others view a partnership and what doors will be opened as a result. Potential funders and others want to be associated with significant work and a reputation for excellence. A single successful partnership can become the springboard for further collaborative initiatives. The Mellon Foundation extended and awarded an additional grant for the SALLP as their confidence was reinforced by the perceived ability of the partnership to realize its goals within agreed timelines and the budget allocated. In February 2004, the Carnegie Corporation of New York awarded a 3-year grant of \$499,500.00 to LIASA for a continuing education project. This grant was made on the basis of the success of the SALLP, the effective and efficient management of the Project and the strong professional partnership that has developed between LIASA and the Mortenson Centre. The goals of this new project are:

- to establish a database of accredited training programmes for the LIS sector,
- to build the capacity of the LIASA Interest Groups,
- leadership training at the Mortenson Centre for 2004 Carnegie grantees.

It is envisaged that this will be a centralized initiative to make training opportunities available to all South African LIS workers irrespective of the levels of initial training. Careful consideration will be given to the quality of training and accreditation of service providers and course content as required by the South African Qualifications Authority (SAQA), and to function within the ambit of the national Skills Development Act. The SALLP Co-ordinator has been appointed the Programme Co-ordinator of this new CEPD Project

Conclusion

Successful international partnerships have the potential to become long term relationships. The professionalism between the working partners is underscored by the synergy of common purpose, mutual trust and respect, and a sense of ownership. The partnership between LIASA and the Mortenson Centre has transcended the barriers of formality to embrace collegial networking and lasting friendships. Together we have indeed travelled far.

References

¹ *Dictionary of Library and Information Management*, Peter Collin Publishing, URL <xreferplus. <http://www.xreferplus.com/entry/1040>>

² Mattessich, P.W., Murray-Close, M., & Monsey, B.R. *Collaboration: What Makes It Work*, 2nd edn. Saint Paul: Amherst Wilder Foundation, 2001. URL <<http://www.wilder.org>>

³ Wildridge, V., Childs, S., Cawthra, L. & Madge, B. How to create successful partnerships—a review of the literature. *Health Information and Libraries Journal* 2004, 21, Supplement 1, 3-19.

RECOGNITION AND QUALITY ASSURANCE IN LIS: NEW APPROACHES FOR LIFELONG LEARNING IN EUROPE

Anna Maria Tammaro

University of Parma,
Department of Cultural Heritages, Section Librarianship,
Piazzale della Pace 7A,
43100 Parma, Italy
annamaria.tammaro@unipr.it

Abstract

The term 'lifelong learning' is used for combining formal, informal and non-formal education and training, with a reconsideration of professional recognition and quality assurance processes. The objectives of the paper are to demonstrate the need of cooperation in quality assurance and recognition between higher education institutions and vocational education and training accreditors. There is a particular focus on exchange of models and methods of accreditation (which have been adopted in LIS) as well as common criteria and principles. In Europe, the internationalisation process – with the Bologna Declaration in 1999 and the Copenhagen Declaration in 2002 - have identified certain concrete outputs in the fields of quality assurance, transparency and recognition of qualifications. This has served to improve the overall performance and attractiveness of European Higher Education and foster students and workers mobility. The European Qualification Framework, Europass and ECVET are discussed as the means by which learning outcomes and recognition of competences can be linked to European Commission action lines. The need for a broad definition of continuing professional development in LIS is outlined.

Introduction

A number of developments are beginning to affect the recognition of qualifications and quality assurance in Library and Information Science (LIS). These developments reduce the value of formal qualifications and academic titles and place more emphasis on labour market-oriented competences and lifelong learning. Firstly, the development of the information society and a knowledge economy highlights the value of the continuous upgrading of professional competences and focuses attention on lifelong learning. Changes involving technology and the organisation of labour in LIS require a high level of re-education and learning of new competences and skills. The economic situation is also influential, leading to flexibility and differences in the significance of qualifications.¹ This in turn has consequences for the position of learning providers, whereby formal higher education providers have to accommodate lifelong learning and share their role with providers of both non-formal and informal learning.

Secondly, internationalisation of LIS professional qualifications is taking place. This paper will focus on the European wide policy developments. The European labour market cannot function effectively without a qualification framework, quality criteria and principles to use as a common reference point for improved mobility and employability. The required mutual trust can stem from quality assurance systems, which are appropriately compatible and credible, and therefore able to be validated. In this regard, a common framework for quality in Higher Education and Vocational Education and Training (VET), as part of the follow up of the Copenhagen Declaration and the Bologna Process, should be top priorities for the European Commission.

These various developments point to the importance of lifelong learning as a competence-oriented approach to the assessment of individuals, not only as a means of increasing their employability, but also for their broader personal and social development. The emphasis of Continuing Professional Development (CPD) should be on 'enhancing participants' by adding value to their abilities, empowering them² and seeing the evidence that learning experiences are having positive effects on personal growth and development. A commitment to lifelong learning, to critical reflection and to adjusting to continual change, are all characteristic of the desirable outcomes. As a consequence different forms of learning - formal, informal and non-formal - should be seen as a continuum.

By formal learning, we mean all forms of learning within a structured learning environment. This refers not only to the formal education system, but also to structured learning in public, intermediary and private training systems. Informal learning is the usually implicit learning outcomes of the everyday activities of the individual in personal, family, professional and social contexts. Non-formal learning encompasses all activities which are not explicitly described as learning but which do contain a substantial learning component. Semi-structured learning, through planned activities in a work environment, is included where elements with a learning component are deliberately introduced (e.g. counselling, supervision, work-based learning etc.).

Recognition and quality assurance in LIS

LIS practitioners seeking a first appointment or promotion within an information organisation should be able to provide employers with assurance of the currency of their knowledge, skills and competences. These benefits should be gained from the recognition of continuing professional education.³ Recognition should motivate and reward practitioners who take their professional development seriously. The professional bodies could be the natural providers of this service because they are independent associations and many of them have demonstrated involvement in accreditation of professional education. Two types of measures can be identified in supporting lifelong learners - counselling for individuals on educational routes and recognition of acquired competences. The counselling of individuals essentially relates to helping them find potential answers to career questions. This counselling can be a basic service, in the form of the provision of information, in other words, familiarisation with the learning labyrinth. Counselling can also go further towards advising on careers and accrediting educational programs.

Recognition is seen as the 'endpoint' in a procedure, where the first step involves making the competences 'visible' to everyone as well as being 'demonstrable' by the person in question. The second step is the validation of the role, which these 'visible' and 'demonstrable' competences can play in the choice of further training, the search for work or participation in socio-cultural life. The third step is the certification of these 'visible' and 'demonstrable' competences.

There are arguably three models for the recognition of formal qualifications and quality assurance in LIS.

1. The *Program accreditation model*, whereby a formal academic qualification is required as a basic entry level into the profession and the accreditation is focused on LIS school programs. For example the American Library Association (ALA) accredits institutions which provide courses rather than the individuals who completes those courses. It sets down standards for accreditation that are regularly reviewed, and examines LIS schools and programs. However in this model there is no requirement for CPD beyond the

entry-level education. This is the most diffused model of accreditation in LIS, but it can lead to stagnation within the profession.

2. The *Individual lifelong learning model* which provides different pathways by which to enter into the profession, of which academic achievement is one. The emphasis is on flexibility, and CPD is the responsibility of the individual information professional. It removes paraprofessional and professional distinction, and CPD is recognised by the professional body. For example the Australian Library Information Association (ALIA) recognises LIS schools as does the ALA, and an applicant for membership must demonstrate that they have completed a recognised course. Members may then choose to demonstrate their commitment to CPD by maintaining a portfolio of relevant activity. The reward is to be able to add CP (certified practitioner) to their post nominals. The weakness of this model is that it ignores program accreditation and there is the need to continuously update the personal portfolio.
3. The *vocational education and training (VET) program model*, where VET is defined as the education and training which prepares individuals for a particular profession, trade or employment. This model has no entry level standards and the training opportunities on which it is based are built on collaboration between stakeholders, including employers, education providers and governments. The most important benefit of this model is flexibility, with a focus on specialisation, together with CPD recognition and emphasis on lifelong learning, but it relies too heavily on subjective assessment of a personal portfolio. There is also the risk that employers may emphasise practical skills rather than deep knowledge. This model has no requirement for professional association involvement in the recognition process.⁴

In each of these three models recognition is based on a competence-based approach. Yet another model is based on criterion-referenced assessment. Many countries have national systems of qualifications that are comprehensive, including all levels of education and training. A number of English-speaking countries have formally developed and published national frameworks of qualifications. For example National Vocational Qualifications (NVQ) introduced in the UK in 1980, are work related and represent a national standards recognised by employers through the country and used as reference criteria for qualifications. One Lead Body for NVQ was created for the information occupational sector, subdivided into the areas of Information and Library Services, Archives, Records Management and Tourist Information. NVQ describes work functions, work tasks and standards of competence in five levels of achievements, each representing an increasing range and complexity of tasks and greater responsibility within the working environment. Each level refers to a job role or a range of role activities. Individuals complete a set of tasks, which are assessed against criterion-referenced national standards, and, if deemed to be satisfactory, a national recognised qualification is awarded.

At the annual conference in Jerusalem in 1980 IFLA commenced a project which has accepted the *Guidelines for Professional LIS Programs* which define accreditation requisites, including core subjects.⁵ CILIP has a different approach. In common with ALA and ALIA, it has a first level program for the accreditation of LIS courses. At the second level, there is verified evidence required of each individual's fitness for professional practice, with evidence consisting of the preparation of a professional development report, a portfolio and an interview. The third level requires the registration and maintenance of CPD records, and Fellowship follows at the fourth level. It should be noted that if the entire validation process has too many compliance requirements or becomes too cumbersome or costly, it will be

bypassed. For example CLENE (Continuing Library Education Network Exchange) attempted to implement a learner recognition and provider approval system tied to quality guidelines. Because the system seemed complicated and involved fees, it was abandoned and eventually transformed to the ALA guidelines.⁶

Competences lists are important tools for recognition and quality assurance. Webber⁷ discusses two competences lists from Europe and one from the USA. The first is the Council of Europe study, in the context of the new book economy, including media and publishing inside the traditional library and information professional's competences. The second study, conducted by TFPL on behalf of the UK Government, related to knowledge management competences. Only the third study, from the SLA was conducted within a professional association. Its target audience is educators, and positioning the profession in the new digital library environment.

Webber highlights international issues of the competences lists as problems associated with linguistics; identifying up-to-date lists of target departments for all countries, and problems of cultural identification. They would be compounded by the fact that a broader range of professions is covered and there would be a variety of different bodies conducting training. With regard to the international recognition of qualifications, it is important to note the work of the European Council of Information Associations which, in 1994, established certification allowing experienced professionals to obtain recognition of their level of qualification, even if they did not possess the corresponding diploma. This model of certification was followed by SEDIC (Spain) in 1997 and DGI (Germany) in 2001. Such achievements fostered the idea of a common endeavour, Decidoc (Develop EuroCompetencies for Information and Documentation), which in turn resulted in *Euroguide LIS: The Guide to Competencies for European Professionals in Library and Information Services*.

Another outcome was the definition of compatibility criteria between different certification systems. The second stage was CERTIdoc, the objective of which is the definition and establishment of a European certification system. The certification procedure will be the same, it will refer to the same range of competences, and the certificate will have the same value.⁸ In almost all European countries, information associations were interested in a European certification in higher levels and expect the information sector to learn from each other and to integrate the various professional groups (archivists, librarians, documentalists, etc.).⁹ CERTIdoc¹⁰ has described the elements of an international recognition process to be;

- Competences: a set of skills necessary to perform a professional activity and the proficiency of required behaviour. The components are: knowledge, know-how, and aptitudes. These are considered as proficient when put in practice effectively and validated.
- Level of qualification: a person's place in reference to a scale of qualifications, which separates the knowledge and know-how of an occupation (or group of similar occupations) into different functions. The level of qualification takes into account the individual's competence (especially technical), the complexity of different responsibilities undertaken, as well as his/her degree of autonomy, decisiveness and foresight.
- Profiles: directory of competencies necessary to exercise a profession.

The risk is that the recognition process will become a rigid grid, leading to the preservation of the status quo rather than motivating people to continual development. A revised accreditation model is needed, focusing on innovation, experimentation and collaboration between different stakeholders. RAPID is an interesting project of collaboration between HE and VET. The RAPID process enables lifelong learners - from students to full

professional status - to trace their progress through a process of identification of skills acquisition and further training needs.¹¹

Dimensions of quality standards

Three sets of quality standards have emerged from various LIS guidelines¹² for evaluating CPD and LIS education - learning outcomes, education process and program administration.

1. With *learning outcomes* it is difficult to identify the quality indicators because they include impact on professional performance and benefits to users. The typical way to show results of CPD programs is the achievement of course objectives by participants, or indicators of their use of learning to improve practice. Some relate to qualification frameworks and include professionalism as knowledge mastery, problem solving, and use of practical knowledge.
2. For the *educational process* the quality indicators focus on the major decision areas for those who plan and conduct continuing education programs. The quality indicators can include; allowing for differences in learning styles, responsiveness to learner backgrounds and preferences, providing opportunities for varied practice and progression, and assistance with self directed learning. The needs assessment procedure includes multiple sources of evaluation.
3. In *program administration* attention is given to functions such as goal setting, staffing, resource acquisition and allocation. Quality indicators are balancing participant's background and aspirations, the learning provider's goals and resources, societal trends and accountability. For teachers, quality indicators include attention to selection criteria, understanding adult learners, and use of effective procedure.

Most commentators agree that LIS program accreditation has resulted in higher standards of education. Saracevic,¹³ however, speaks of the "iron grip" on library education held by the ALA Committee on Accreditation (COA), and then ALA President-elect Michael Gorman criticized the ALA program accreditation for "simply measuring a program against its own mission and vision statements, adding that, due to an increased concentration on technology, curricula in LIS programs today are not adequately addressing the real needs of the profession".¹⁴ Gorman concluded with a plea that accreditation be tied to national standards and that the programs develop greater concentration on librarianship by cooperating with practitioners in developing curricula.

LIS accreditation is at a crossroad. A lack of a common definition of quality and the absence of consistent goals and processes make it not only difficult but also undesirable to collaborate on a single accreditation system. Different stakeholders have different view on what constitutes quality. Some trends, however, must not to be overlooked. The actual shift of pedagogy from teaching to learning, and the focus on learning outcomes and lifelong learning, will place students in a more central role in the quality assurance process. It is also important to study the employers' expectations and analyse the labour market. For quality assurance to work properly and to meet its objectives, it should be a cooperative enterprise among higher education institutions and accreditors. The recognition of individual lifelong learning could be the common model, once the focus on learning outcomes is clarified.

The first two clusters of quality indicators are listed in Table 1, together with recognition systems. Concerning quality assurance and the recognition process, the key issues seem to be around learning outcomes, in particular the extent to which an accreditor specifies learning outcomes or allows institutional discretion. There are also issues related to whether

an accreditor is primarily concerned with either individual student competences or overall program effectiveness. That is, does an accreditor examine direct evidence of student achievement or the adequacy of the processes used to assure particular levels of student attainment?

Within the framework of lifelong learning, higher education and vocational education and training assessment should gain visibility and transparency through their integration. Common themes are now based on a new learning philosophy emerging in response to changing social and political realities. What may promote a more shared position for HE and VET accreditors? The recognition and quality assurance issues, briefly indicated at national level, are not different at international level. National and international LIS recognition and quality assurance systems should focus on different learner profiles and needs.

Table 1 Recognition and quality assurance in LIS

LIS Guidelines	Unit of analysis	Ways of looking at performance	Ways of looking at outcomes	Ways to review performance
CILIP	Program	- Purposes - Resources	- Employment - Further education - Career mobility - Income - Self-assessment - CPD	Accreditation of programs
	Adult learners	- Academic qualifications - Competences		Supervised training and portfolio
ALA-APA certifications	Program	- Needs assessment - Curriculum Design and delivery - Assessment exam and planned evidence of results - Target audience - Eligibility requirements	- Learning outcomes and competences; - Responsiveness to learner backgrounds and preferences; Opportunities for the profession; - Program evaluation methodology (including quantitative and qualitative data)	Measurement of: - Number of participants; - Number of institutions offering coursework; - Quality of learner assessment products; - Evaluation of each delivery institution or individual; - Participants evaluations
	Program	- Mission, goals, objectives; - Curriculum content; - Faculty or faculty recruitment plans; - Students recruitment, pre-requisite; - Physical resources and facilities; - Administration and financial support; - Evaluation plan.	- Desired learning - Outcomes assessment - Way of accommodate various learning styles; - Way of encouraging students to practice and apply their learning	- Measures of aims and objectives achievement; - Resources effectively used; - Departmental and program evaluation; - Student's achievements: basic skills, thinking and practice in the discipline, preparations for lifelong learning. - Examinations - Performances - Student work - Alumni survey - Employer feedback - Assessment of student learning outcomes - Student evaluation
ALIA	Program	- Resources - Design and content of the program - Staff quality	Measures of number of students, drop out rates	- Assessment of student learning outcomes - Student evaluation
	Adult learners	- University program - CPD - Work experience - Competences	- Mechanism for equivalence of formal qualifications. - Minimum 20 hours for year of formal training	Recognition of ongoing learning, acceptable to employers and compatible with Australian Qualifications Framework
CERTIdoc	Adult learners	- Competences - Diploma (Level 1: in Higher Education; other Levels: secondary studies) or professional Diploma or a course of 200 hours - Professional experience (Level 1: 5 years; other: 3 years) - Plan for CPD	Self-assessment	- Assessment of items in the dossier; - Interview; - Decision of the Certification Committee - Periodic Renewal
IFLA	Program	- Mission, Goals and Objective - Curriculum - Core elements - Continuing education - Faculty and staff - Students - Admission/completion requirements - Administration and financial support - Instructional resources and facilities	Regular review of the curriculum, informed by input from employers, practitioners and professional associations, as well as students and faculty	- Evaluation of student achievement, provided in consistent and equitable basis - Student and alumni evaluation on a regular basis

There is yet another challenge facing the recognition process in the potential for increased international equivalency of LIS professional's qualifications. The lack of equivalency is currently hindering the international mobility of LIS professionals and failing to protect students from diploma-mills. Harmonisation of the standards required for success in LIS schools has failed to eventuate. IFLA has studied possible methodological approaches to the equivalency of qualifications, but the issue of international recognition of qualifications is extremely complex and requires commitment and support from the international LIS community.¹⁵

European Commission policy

The policy of internationalisation of the European Commission focuses upon two major issues; the need to facilitate worker mobility and improving economic effectiveness by increasing skills and employability of graduates. The Bologna Declaration (19 June 1999) and the Copenhagen Declaration (30 November 2002) promoted enhanced European quality assurance and co-operation in higher education and vocational education and training with the aim of ensuring greater transparency, comparability between approaches in different countries and better employability.

The general aim is not only to support lifelong learning but also to audit results. From a political point of view the focus is on persons, or non-traditional learners, including special needs communities such as the handicapped and immigrants. Because mobility is closely linked to the way in which learning and competences are recorded and valued in different countries, the focus is on transparency, credit transfer, quality assurance and common frameworks of qualification. Throughout the Bologna Process and in the Copenhagen Declaration (2002) outcomes are formulated for HE and VET. These measures are two-part. Firstly, some are designed to eliminate extrinsic barriers to participation in life-long learning. These include measures related to mobility such as the European Qualification Framework and the Europass. Secondly, some measures are designed to encourage CPD, such as time credits, training credits, career credits, etc.

While transparency was originally linked to mobility in the European labour market, it has a much broader significance in the development of policy on education and training. To give transparency to qualifications, the first strategy adopted at Community level has been the realisation of common reference tools for the recognition of qualifications of skilled workers and quality assurance.¹⁶

The European Qualification Framework (EQF) will make it possible to compare and link the growing diversity of education, training and learning provisions existing throughout Europe. The notion of 'levels' of education is taken to be broadly related to gradations of learning experiences and the competences that an educational programme requires of participants. Broadly speaking, the 'level' is related to the degree of complexity of the content of the programs. This does not imply that levels of education constitute a ladder where the access of participants to each level necessarily depends on having successfully completed the previous level. It does mean that competences, in the form of knowledge and learning outcomes, are always given their value through qualifications awarded by educational players.¹⁷ EQF is at an early stage of development, but many of its important elements, such as the learning outcomes, the credit transfer system and the portfolio, have been established.

The need to develop linkages between higher education and vocational education must surely be central to lifelong learning and mobility and this is why the Copenhagen Declaration is combined with the Bologna process. Learning outcomes are the basis for this integration and they have applications at three distinct levels; the local level of the individual higher education institutions; the national level, for qualifications frameworks and quality assurance

regimes; and the international level, for wider recognition and transparency purposes. Learning outcomes also represent an approach that plays a significant role in a wider context that includes; the integration of academic and vocational education and training, the assessment of prior experiential learning (APEL - also known as PLAR, prior learning assessment and recognition), the development of lifelong learning qualifications frameworks, the development of credit transfer and accumulation systems.

This represents a change in emphasis from 'teaching' to 'learning', or what is known as the adoption of a student-centred approach in contrast to traditional teacher-centred viewpoint. Student-centred learning produces a focus on the learning assessment and the fundamental links between the program design, course delivery and measurement of learning. The learning outcomes-based approach also has implications for quality assurance and recognition.¹⁸

The Qualification Framework would need to be complemented and supported by a range of instruments and guiding principles agreed at European level. Elements to be included are;

1. Europass. Covers qualifications and competences achieved through lifelong learning. Focuses on personal competences (CV), language learning (European Language Portfolio), mobility experiences (MobiliPass) and qualifications in VET (Certificate Supplement) or in HE (Diploma Supplement).
2. ECVET. A credit system, which can support the transfer and accumulation of credits by learners. It can be based on notional accounting of time and workload and linked to learning outcomes. At present the ECTS is a system used for European HE transfer of credits across borders.

Europass should consist of a portfolio document, with a common brand name and a common logo supported by adequate information systems, voluntary adopted by individuals. The open architecture proposed for Europass is comparable to the common architecture in three cycles of European higher education degrees and will in future allow new and dynamic approaches to assessing, validating and recording learning. Competences can be demonstrated and therefore assessed and related to the corresponding professional qualifications. This is seen as a necessary feature of any reference tool, pointing to the need for an approach based on competences and learning outcomes.

ECVET introduces credit systems for the accumulation (more than transfer as originally conceived) of credits: it requires a compatible organisation of curricula and program delivery and a mutual trust in the quality of learning providers. However there are a number of issues that make implementing a credit transfer system for VET more complex than in HE, essentially due to the lack of quality assurance systems in training.

It is important to recognise the broad connection between learning outcomes, levels, level descriptors, credits, and recognition of qualifications and quality assurance. Learning outcomes have been described as a basic educational building block and as such they have direct and powerful links with a number of other educational tools. They make possible much more than the simple identification of learning achievements as they relate directly to levels and level indicators. When learning outcomes are written they are created in the context of the institutional/national/international reference points that aid the maintenance of standards and quality. However, ECTS credits are not currently linked to levels and consequently they suffer from being rather crude instruments as they cannot delineate progression or indicate anything about the nature of learning. It is only when credits are linked to level and learning outcomes, that they reach their full potential.

Conclusion

The implementation of a learning outcome approach would mean a decisive advance on current practice of fragmentation and division between information professionals and teachers. The benefits of cooperation regarding the recognition of qualifications and quality assurance would be;

- ease of access to a standard qualifications framework,
- cost-effectiveness of quality assurance methodologies,
- recognition of work experience in place of formal education,
- facilitating the employment and careers of LIS professionals.

One possibility is now to work within the internationalisation framework in Europe for the LIS sector. In the context of European internationalisation, the current trend is to consider quality assurance in education and training holistically, taking into account recognition of qualifications and quality assurance, which are necessary for facilitating lifelong learning. The driving force of the EU policy is the mobility of students and workers, but the efforts are towards increased quality and transparency and visibility of competences at sectoral, national and then international level.

The recognition of acquired competences is aimed not only at improving employability through the recognition of directly usable competences. The recognition of competences also aims to increase the intrinsic learning motivation and participation in life-long learning by starting from the continuous improvement of 'acquired competences' and not only from a 'lack of competences'. It also acknowledges the value not only of formal learning, but also of non-formal learning. In the debate concerning life-long learning, the concept of employability dominates. This implies that the emphasis is placed on labour market-oriented competences and on the recognition of competences associated with immediate employability. It is clear that this implies a serious narrowing of the broad competence concept promoted in the academic context.¹⁹

A learning outcomes approach is, by definition, an approach with a lifecycle perspective. This means that, in addition to immediately employable competences, attention is also devoted to the continuous development of learning and career competences. The recognition of competences is then a possible component or instrument of career guidance and development. The challenges of internationalisation and rapid economic and occupational change have given rise to the development of sectoral business and industry. This has in turn led to the development of international training modules, assessment standards, assessment methods, curricula and qualifications and/ or competences. The LIS professions need to adopt a broad definition for continuing professional development, and a portfolio based approach to personal career planning.

References

¹ Walton, G. & Edwards, C. Flexible staff: implications for the drive for flexibility on the changing skills and attributes in higher education librarians developing hybrid library service. In: Woolls, B. & Sheldon, B. E., (eds) *Delivering Lifelong Continuing Professional Education Across Space and Time: Fourth World Conference on Continuing Professional Education for the Library and Information Science Professions*. Munich: Saur, 2001: pp123-131.

² Haycock, K. Continuing professional education: towards evidence based practice. In: Woolls, B. & Sheldon B.E. (eds) *Delivering Lifelong Continuing Professional Education Across Space and Time: Fourth World Conference on Continuing Professional Education for the Library and Information Science Professions*. Munich: Saur, 2001: pp1-8.

³ Layzell-Ward, P. Fit to practice?: the need for the certification of professional knowledge and competences. In: Woolls B., & Sheldon B.E. (eds) *Delivering Lifelong Continuing*

Professional Education Across Space and Time: Fourth World Conference on Continuing Professional Education for the Library and Information Science Professions. Munich: Saur, 2001: p.224-

⁴ Tammaro, A.M. Riconoscimento dei titoli accademici e accreditamento professionale in un ambito internazionale: la sfida attuale delle università italiane per i professionisti dell'informazione. *AIDA Informazioni* 2003, 40-60.

⁵ IFLA. Section on Education and Training. Guidelines for Library Information Educational Programs: IFLA, 2000. URL <<http://ifla.inist.fr/IV/papers/060-161e.htm>>

⁶ Varlejs J. Continuing education tiptoes online: where are the quality guidelines? *Journal of Education for Library and Information Science* 2003, 44(3/4), 332-.

⁷ Webber S. Competencies for information professionals. *Journal of the American Society for Information Science* 1999, 26 (1).

⁸ Meyriat J. *The CERTIdoc Project: Towards a European Recognition of the Professionals' Competencies*. Berlin: IFLA, 2003: p1.

⁹ Rittberger M., & Schmid, M. *Certification of Information Professionals in Europe: CERTIdoc Project: Inquiry*. Berlin: Deutsche Gesellschaft für Informationswissenschaft und praxis, 2003: p63.

¹⁰ CERTIdoc Consortium. *General rules. European System of Certification of Information Professionals*. Paris: CERTIdoc Consortium, 2003: p17.

¹¹ Brine A. & Feather J. Building a skills portfolio for the information professionals. *New Library World* 2003, 104 (1194/1195): 455-463.

¹² Knox, A.B. Strengthening the quality of continuing professional education. In: Woolls, B. & Sheldon, B.E. (eds) *Delivering Lifelong Continuing Professional Education Across Space and Time: Fourth World Conference on Continuing Professional Education for the Library and Information Science Professions*; Munich: Saur, 2001: pp248-252.

¹³ Saracevic, T. Closing of library schools in North America: what role accreditation? *Libri*, 44 (3), 190-200.

¹⁴ Anon. (2004) Gorman, panel express concerns for LIS education. *Library Journal*. URL <<http://www.libraryjournal.com/article/CA481954>>

¹⁵ Dalton, P. & Levinson, K. An investigation of LIS qualifications throughout the world. *66th IFLA Council and General Conference, 2000, Jerusalem, 13-18 August*. URL <<http://www.ifla.org/IV/ifla66/papers/061-161e.htm>>

¹⁶ European Commission. Irish Presidency Conference. *Towards 2010: Common Themes and Approach Across Higher Education and Vocational Education and Training in Europe. Background Research Paper*. Dublin: Irish Presidency Conference, 2004: p. 116. URL <<http://www.nqai.ie/eureport.pdf>>

¹⁷ Bjornavold, J. *Making Learning Visible*. Thessaloniki: CEDEFOP, 2000.

¹⁸ Adam, S. *Using Learning Outcomes: A Consideration of the Nature, Role, Application and Implications for European Education of Employing 'Learning Outcomes' at the Local, National and International Levels*. Edinburgh: UK-Bologna Seminar, 2004:30. URL <http://www.bologna-bergen2005.no/EN/Bol_sem/Seminars/040701-02Edinburgh/040620LEARNING_OUTCOMES-Adams.pdf>

¹⁹ Cronin, B. Accreditation: retool or kill it. *Library Journal* 2000, 125 (11): 54.

SERVICE EXCELLENCE: A CAMPAIGN TO BUILD CAPACITY TO MATCH SERVICE DEMANDS IN A LARGE SOUTH AFRICAN UNIVERSITY LIBRARY

Clare M. Walker

Deputy University Librarian (Client Services)
University of the Witwatersrand, Johannesburg
Private Bag X1, 2050 WITS
South Africa
walker.c@library.wits.ac.za

Abstract

The context, programme and challenges of a Library 'Service Excellence Campaign' are described and discussed. The campaign was initiated during 2004 at the University of the Witwatersrand, Johannesburg as part of a university-wide pilot programme. In the context of increasingly sophisticated library information services, systems and academic users, heavy demands are made on staff development in the workplace, and on managers and supervisors accountable for the quality of service delivery. The paper describes a workplace training programme developed on the basis of a customer service survey. One of the planned outcomes for the Library is a 'Client Services Charter'. Several examples of Library Service Charters available on the Internet are given. The paper concludes by suggesting that incorporating these concepts into a service charter, as well as more arithmetic standards of service, should continually remind staff of their commitment to service excellence in the University Library.

Introduction

The University of the Witwatersrand, Johannesburg (Wits) has used the term 'excellence' to express its mission, vision, goals and ideals for many years. Many references to 'excellence' appear in the documents on the University website.¹ One of the most recent of these is the University's so-called 'transformation document', *Into the Future*,² prepared by a high level University 'think tank' in 2004. This 33-page document embodies the University's current perceptions of how it should change and achieve excellence. Improving service excellence is one of the explicit focus areas of transformation at the University; and *Into the Future* incorporates sections headed 'Transformation as excellence' and 'Transformation as service excellence'.² Nevertheless, the meaning of excellence in the context of 'transformation' is never made explicit.

A 2004 two-day 'Service Excellence' workshop offered at the University by the Centre for University Learning, Teaching and Development (CLTD), targeted support and professional staff dealing with the University community. The workshop objectives stated that at the end of the workshop should be able to:

- identify clients of the University and understand service from their point of view,
- recognise client needs and expectations,
- communicate effectively with clients,
- understand the impact of a positive mental attitude on service,
- recognise the positive effect of support systems within the work environment,
- demonstrate an effective telephone technique,
- deal with difficult clients,

- draw up a strategic client service plan for departments.³

A recent internally circulated report, based on feedback from a series of ‘Have your say’ workshops held in mid 2004, acknowledges that “there seems to be no University-wide definition of what is meant by excellence”. The report noted staff opinions that the delivery of academic excellence is hampered by poor teaching conditions, which include “the poor state of Wits’ library facilities”.⁴ The section on ‘Transformation and service excellence’ in *Into the Future* refers to the 2004 CLTD Service Excellence campaign “aimed at improving the service offered to internal and external clients of all the University’s services. These clients include our own members of staff, using services offered by support departments...”²

The Library and service excellence

The current draft of the University’s Operational Plan links operational goals to the goals of the University’s Strategic Plan. Goal 1 could be taken as an implicit definition of excellence at the University:

Teaching, learning and research practice to ensure that student success and adaptability in undergraduate and postgraduate education are of the highest quality, to grow the number of world-class research areas at Wits, to produce independent thinkers who will contribute, in a broad sense, to the intellectual status of the country, and to promote and defend the principles of academic freedom and tolerance.⁵

The evolving goals of the Library’s Strategic Plan⁶ express explicitly the core academic support role the Library perceives for itself in support of University teaching, learning and research practice. Goal 1.4 reads, “To provide high quality academic support services that are inclusive of all sections of the University community and responsive to the needs of the individual”. Goal 2, in step with University Goal 3, is “To recruit, develop, retain and reward high calibre and service oriented members of staff who are competent, individually and collectively, to achieve the Library’s goals”.⁶ Participation in the University’s Service Excellence campaign during 2004 has therefore been in complete alignment with these goals.

In the beginning: ‘moments of truth’

In late 2003 the University commissioned a pilot programme to address service excellence in Support Services, using a consulting company, ServiceMix, whose chief consultant was also a part-time lecturer at the University’s Business School. This programme was coordinated by the Director of the CLTD, which initially targeted three major University support services units, including the University Library.

The Client Services division of the University Library comprises the libraries serving all faculties and schools except the Health Sciences and Law libraries. There are over 80 members of staff in this division; approximately 65% hold posts at library assistant grades where formal professional qualifications are not required. Senior professional librarians carry first line managerial and staff development responsibility for branch librarians and staff in smaller branches, and larger service sections. These 7 librarians, including the Deputy Client Services Librarian, make up the Senior Librarians’ Team (SLT) which was responsible for driving the first year of the Service Excellence programme.

The historical demographics of the staffing structure of the University, as a South African institution, are such that the substantial majority of library assistants use English as a second or third language. It is these staff who are at the front desk of most service points, and who therefore field the first line of inquiries and must choose how to respond and whether to refer users elsewhere. It is therefore these staff whose service delivery predominantly formed the basis of the perceptions described below as ‘moments of truth’, on which the service excellence campaign has been predicated. These members of the Library staff confront major

challenges every day, in the form of complex high-tech integrated library systems in a decentralized library, and the use of academic subject terminology, in receiving and responding appropriately to requests and inquiries from a wide range of undergraduates, postgraduates and academic teaching and research staff.

Following initial discussions with members of library management in October 2003, the ServiceMix consultant appointed student assistants to conduct and analyse pilot interview surveys. These were carried out on samples of student and academic staff users of two specific Library units commonly perceived as delivering poor service to their University customer base. Four detailed reports on the surveys, two customer service index (CSI) reports^{7,8} and two assessments of best practice,^{9,10} were rapidly processed and prepared for workshop during November.

The 'Moments of truth' were verbatim comments in response to the 'Moments of truth' section of the Customer Questionnaire:

A) Think of a time when you had a particularly *satisfying* or *dissatisfying* interaction with [a member of Library staff]; B) Are there any *recurring service issues* which you feel the [Library] ought to address to improve their service? C) Please add any other appropriate COMMENT on the way service from [the Library] is or should be delivered that can lead to improvements.^{7,8}

Respondents comments were recorded in full in an Appendix to each report and, together with the verbatim comments accompanying the structured general questions and so-called 'recurring issues', would make uncomfortable reading for managers of any service environment. With reference to Library staff, these reports demonstrated that staff attitudes, interactive skills and levels of competence, as perceived by users, urgently needed to be addressed. As the introduction to Section 1 of each report states,

Moments of Truth represent a vivid and candid account of customers' actual positive or negative encounters with your service and your staff. They are your customers' perception of what they perceive is happening for them with your service right now. More often than not, they form the basis of a point of view which tends to become entrenched in your customers' minds and highly resistant to perceptual change ...^{7,8}

The two best practice assessments^{9,10} analysed the 'Top-10 issues' and identified 'service culture' and 'interaction skills' as the relevant best practices to address 'negative staff attitude'. Technical competence, 'interaction skills' and 'service culture' were the identified components of 'relevant best practice' to address issues of Library staff competence.^{9,10} These reports offered brief descriptions of 'best service practices' and commented that 'building internal capability' is less of a 'best practice' in itself and more of a supporting activity to all other elements of best practice. In this instance the supporting activities identified were service culture, a shared vision driving the service; technical and interactive competences; and team work.

Prior to the workshops, further discussions based on the reports took place with the consultant, the University Librarian, the Deputy University Librarian who is line manager for Client Services, and the Deputy Client Services Librarian (whose portfolio includes user surveys and Library suggestion boxes). It was agreed that:

- the Library would participate in the Service Excellence workshops at CLTD,
- although users of only two service sections had been surveyed, these would not be the only sections involved: the "moments of truth" and other comments were likely to be relevant in all Client Services branches,
- the campaign would be driven by the Senior Librarians' Team (SLT), headed by the Deputy Client Services Librarian.

CLTD workshops

In November 2003, the SLT (expanded to include two other senior members of staff), together with similar teams from other University units, participated in three CLTD workshops facilitated by the consultant. The 'Top-10' customer service problems identified from the survey inputs were highlighted and strategies on how to address these problems were discussed. The 'Top-3' problems that emerged were,

- negative staff attitude,
- hours of opening,
- staff competence.

The SLT group was helped to define and understand problems from a customer perspective, asking questions such as:

- what happened that caused a library user to say a member of library staff was incompetent?
- why does the user see it as a problem?
- how is it a problem to the Library ?

A long list of 'Drivers & Barriers' (that support or block good practice) was compiled and analysed in relation to the 'Top-3' problems. Many of these were environmental or systemic; almost twice as many (71) barriers as drivers (39) were mentioned. Drivers that may be considered directly relevant to staff competence and interpersonal attitudes include:

Right people for the job
Performance appraisals
Training for computer literacy
Department dedicated to competence
Training, skills development
Interactive skills
Understanding the Wits environment
Knowledge of procedures
Motivation & coaching
Continuous improvement of skills
More time to finish work
Discipline
Teamwork
Good communication improves performance
Focused meetings
Feedback from meetings
Compliments from customers

SLT brainstorm: February 2004

The challenge to the SLT was to inculcate, enhance and reinforce a culture of 'best practice' in all sections of Client Services. Many specific and practical recommendations had emerged from the workshops. These included Wednesday morning late opening for staff training sessions; establishing levels of staff competence; dealing with client problems by ensuring an adequate and appropriate staff presence at all times; induction programmes for all new Library staff; assessment of improvement by surveys, suggestion box comments, compliments and criticism received ('bouquets & brickbats') and a 'Question of the month' ongoing survey.

A full-day breakaway SLT 'brainstorm' session addressed in particular:

- What attitudes and competencies should change?

- What could be addressed by a programme spread over 2-hour sessions on 8 Wednesdays?
- What kind of evaluation could be incorporated?
- What are the core elements for a 'Client Services Charter'?

The SLT recommendations built the structure and contents of the 2004 training programme. To facilitate this, the Senate Library Committee approved, at its first meeting of 2004, the proposal that all sections of the Library should open at 10h30 instead of 08h00 on the first Wednesday of every month to accommodate programmes for staff training (except in exam months, June and November).

Training for competence; recognising and changing attitudes

Senior Librarians were briefed to plan and deliver in-library, interactive, staff-centred branch training programmes in 2-hour sessions intended to build competence, basic knowledge and application of information available on the Library's website. Case studies, video programmes showing client and staff interaction in libraries, and discussion of in-house problems were incorporated in the programme.

The first, essential, step was to explain to all staff in all branches the origin and purpose of the Service Excellence campaign. This was met in some libraries with criticism and resistance. Next, Senior Librarians were asked to establish, informally and without actual testing, some idea of the ground levels of staff competence in a number of areas:

- circulation & desk routines (Wits Library uses Innopac Millennium and training is carried out in a separate program by the Library Systems Coordinator and colleagues),
- logging on and off specific programs,
- directional knowledge of the information contents of the extensive Library website,
- basic subject knowledge for information retrieval from e-resources (Wits Library subscribes to over 55 major electronic resources products which provide access through a subject portal to thousands of full text electronic journals),
- knowledge of own branch subject coverage and other libraries (working from the courses and programmes outlined in the Faculty Handbooks of the University Prospectus),
- how to deal with 'customers' (using videos and locally developed case studies).

Issues of 'dealing with customers' included:

- sufficient staff at service points during lunch and tea breaks,
- rotation of staff to acquire a range of skills and thus substitute competently if other members of staff were ill or away (staff have been accustomed to being appointed to one post with one specifically defined job description listing the specific tasks to be undertaken; moving outside this presents a challenge and can result in resistance),
- selection of appropriate staff for positions/grades (this also includes an understanding of preparation for a career path within the library and the controversial issue of "succession planning"),
- staff recognition/reward system (a controversial issue),
- involving the Library Education & Training section in service delivery and motivational sessions,

- feedback to staff on outcomes of service excellence surveys.

The need for a Library-specific induction programme for all new Library staff was also identified.

Contents of training sessions

Senior Librarians were given freedom to plan the monthly Wednesday morning programmes as they wished, provided they covered the core elements of:

- increasing knowledge of the contents of the Library's website (a "walk through the website"),
- basic knowledge of the existence of, and first line access to, Library electronic resources,
- basic knowledge of the fields of teaching and research carried out in the faculty and schools served by each.

It was emphasised that basic directional knowledge about the contents of the website and electronic resources could not be a substitute for referring subject information inquiries to the professional Library staff in each branch.

Suggestions were made as to how these sessions might be carried out; these were not prescriptive. Periodic reports were required. Methods chosen for exploring databases and the Library webpage in the first 3 months of 2004 included:

- holding sessions on accessing and using databases, either in branch libraries or in the Library Electronic Classroom facility; reporting back and sharing what had been learnt on training sessions attended by individual members of staff,
- staff taking turns to show one another aspects of a resource or section of the website, or working with one another on problems; this led also to a greater sense of teamwork and reliance on each other for assistance in approaching user inquiries,
- visits by groups of staff to different sections or branches, to expand awareness of the system as a whole and improve response to users' directional or information inquiries; these were very popular.

Many user comments related to library staff attitudes. The training sessions in the second half of 2004 required staff to focus on this more personal and therefore potentially sensitive issue. The point was made repeatedly by staff that the attitude of users - both academic staff and students - was part of the problem, and that the 'moments of truth' referred to above were in many cases only part of the truth.

In August 2004 a video viewing session for all client services staff was prepared and presented by the author as division manager. Several library customer services teaching videos from the UK and the USA were used, interspersed with discussion relating what had been portrayed on the screen to personal frontline experiences. It was evident that these videos brought an added dimension to recognising and understanding attitude problems and exploring ways of managing difficult situations and interactions with clients. The issues addressed covered many familiar front desk scenarios, ranging from academic staff anger at being fined for late returns, to receiving time-consuming inquiries or dealing with long lines at the moment a member of staff was due to go on a break, to incomprehensible accents of non-English speaking users (it was significant that language problems at the desk were revealed to be not at all uniquely South African).

Follow-up training sessions featured more videos selected by senior librarians, discussions of actual problem situations experienced, and informal role-plays within libraries to act out solutions. A set of short scenarios for handling information inquiries was developed

by the Library's Education & Training section and a set of short role-plays on attitudes was prepared by the acting Senior Arts Librarian.

Assessment and feedback

The SLT workshop had agreed that assessment of the extent of improvement in perceptions might be evident from:

- surveys (a repeat of the CSI customer surveys is planned for late 2005),
- suggestion box comments, compliments and criticism (already well established),
- a new in-library and web-based 'Question of the Month (QM) self-administered survey, starting in August 2004. Each QM will be self-administered twice, in the second half of 2004 and again during 2005. The first QM asked "*Do you find the Library staff helpful and responsive to your needs?*", echoing Question 9 of the survey conducted by ServiceMix students. The simple, non-scientific analysis of the 720 responses to the first QM showed 85%-100% positive responses, in all but one library. The analysis by branch was made available as positive feedback.

During 2004 CLTD established an email 'Service Excellence Hotline' to facilitate feedback on a full range of University service divisions, including the Library. Possibly because branches of the Library have well established suggestion boxes and online communication links from the Library web page, very few comments (all positive) were forwarded by CLTD to the Library. No negative comments were forwarded.

Two review meetings were held with Library staff: with SLT in November 2004 and with all Client Services staff in early December. Senior Librarians commented that their branch staff:

- seemed to have more overall knowledge of the Library and its systems,
- seemed to have more awareness of themselves in a service context,
- smiled more,
- worked with greater confidence on what they did and did not know, and could refer more easily,
- worked more as a team.

The review meeting with all staff in December 2004 reinforced many of these comments. Suggestion box comments had decreased since the introduction of the focused QM collected through the same process. The second QM, in September-October, which at the time of writing is still to be analysed, asked if clients had found what they needed in the Library; and the third, running until the end of January 2005, asked whether the Library had met clients' research needs.

The challenge in 2005, the second and final year of the campaign, will be to maintain and reinforce a 'culture of self development' in tandem with sustained and increasing levels of service delivery. Key focus areas will be:

- transferring skills from training sessions to the service desk,
- subject knowledge and terminology: what faculties teach and what research they do; what terms they use,
- information services and keeping up to date with Library resources and services,
- discussion sessions to share problems experienced with challenging clients,
- developing content and wording for a Client Services Charter.

Staff development and user expectations: a client services charter

At the February 2004 workshop Senior Librarians were asked to brainstorm a list of core elements for a future Library Client Services Charter, a tangible product of the Service Excellence campaign. (The author was pleased to learn, in a personal email communication in September 2004 with Ian Smith of La Trobe University, Australia, that this process had been successfully completed over two years by the La Trobe Library).

The SLT identified the following core staff and service elements for inclusion in a charter (in addition to the provision of appropriate resources and study environment):

- access to staff competence: staff who know how to use the Library's resources,
- access to training for staff and users for the efficient/effective use of resources,
- a service ethic culture among library staff, which included a culture of referral (i.e. 'humility'),
- commitment to speedy, pleasant service,
- facilitating the user's quest for knowledge,
- continual improvement of service.

A Google search of the terms "client service charter/customer service charter/service charter/user charter" retrieved several hundred results from the websites of universities across Australia, New Zealand, the United Kingdom and the United States. A selection of approximately 30 examples revealed widely differing references to staff competence: in some charters, staff seems to be mentioned only nominally, as part of the overall environment. In the brief extracts from 17 charters quoted below,¹¹⁻²⁷ however, the references to staff performance clearly would lead clients to expect continual professional and workplace staff development in the library as part of the overall quality of service delivery, and should serve as an imperative for sustained monitoring and planning. The charters described this core element in the following words:

"...professional qualified staff; professional accurate information services".¹¹

"To develop and maintain well-trained and qualified staff that is dedicated to service excellence, to provide the best most responsive service..., to be the information hub of the University ..."¹²

"leadership and expertise in navigating an increasingly complex and diverse scholarly information environment..."¹³

"Our staff are well trained and committed to maintaining the highest standards in serving you. They will... respond to your queries promptly or refer you to another librarian...An external review of the Library recommended four key services: ... Experienced staff to assist with your information needs... Support in assisting you to become an independent learner through expert assistance at our service desks..."¹⁴

"The Library staff aim to: Provide useful and knowledgeable advice about the library environment and services; Deal with your requests in a timely and efficient manner; Assist you in finding information".¹⁵

"The Library is a vital partner in the teaching, learning, research and community service activities of Murdoch University... Our objective is to provide the best possible library service and to be responsive, innovative and professional in everything we do".¹⁶

“We will create a service responsive to our users’ needs; ... We provide customer care training for library staff; We train our staff to provide a quality service”.¹⁷

“...Its educational and resourcing activities are supported by the broad knowledge and skills of its staff teams. The Library uses the Balanced Scorecard as its quality management framework. This integrates the performance management program and other quality initiatives into a comprehensive planning tool. Annual initiatives and key performance indicators focus on – client perspectives; internal processes perspectives; learning and growth perspectives; financial perspectives. Library staff are committed to giving you high-quality service. Their knowledge and expertise is continually enhanced through the Library’s staff training and development program... Liaison Librarians continually strive to be aware of the requirements of faculties and disciplines and to help you with your detailed information needs... Our aim is for continuous improvement in the quality of our service.”¹⁸

“We train our staff to provide a high-quality user-focused service and to help you make the most of your time at ...”¹⁹

“To be an innovative university library service which is integral to the institution’s achievement of quality in learning, teaching and research. To achieve this the Library will Provide comprehensive and high quality services within the resources available... Library staff will be appropriately trained and provide courteous and helpful service to users”.²⁰

“We aim to provide quality service...through...skilled assistance in locating information resources; an efficient, responsive and flexible organisational structure”.²¹

“The staff of the ... Library are committed to providing excellent service. Success in providing excellent service is a partnership between library staff and library patrons. The Service Charter describes: our overall commitments to excellent service; the levels of service that we to achieve within the limits of available resources; Service commitments: Library staff are committed to providing the best possible customer service within the limits of available resources”.²²

“The Charter Mark is an award for excellent public services... we had to show that: We set tough performance standards and tell you whether we are achieving them; we are courteous and helpful, and responsive to your needs and wishes”.²³

“Library staff will be helpful and courteous in their dealings with users”.²⁴

“We strive to understand and meet the information needs of our clients and will offer a professional and courteous service to all library users”.²⁵

“The University ...Library is a dynamic partner in the teaching, learning and research activities of the University. The Library provides high quality information services and resources to support students and staff... Through it services, staff expertise and programs the Library assists clients to develop skills for lifelong learning... Library staff work collaboratively ...to develop library resources and services to support the diverse learning and teaching programs of the University”.²⁶

“High quality services are provided by well-trained staff who are responsive to user demands and proactive in the development of services and in the use of new technology”.²⁷

Statements of commitment to excellence are a matter of words; measuring up to the words and monitoring this continually remains the challenge for all staff development programmes. For the future Client Services Charter of the University of the Witwatersrand Library, detailed statements of commitment to performance as well as service excellence, such as those quoted here, particularly from the charters of Murdoch University,¹⁶ Queens University of Technology,¹⁸ University College Worcester²⁰ and the University of Sydney,²⁶ are models that express much of what the Service Excellence campaign hopes to achieve.

Acknowledgements

The author would like to thank the staff of the Client Services division of the Library of the University of the Witwatersrand, Johannesburg, and in particular the expanded Senior Librarians' Team and the Deputy Client Services Librarian, Sibusisiwe Thembele, for their work on the Service Excellence campaign, which has, to quote his own expression, "flattered" the ServiceMix consultant. Sibusisiwe Thembele compiled the original brief reports to Library Management recording the Library team's participation in the ServiceMix workshops and the conclusions and recommendations from which the SLT brainstorm in February 2004 proceeded. The author also acknowledges the support of the University Librarian, Felix Ubogu, and the University of the Witwatersrand, Johannesburg.

References

- ¹ University of the Witwatersrand, Johannesburg. URL <http://www.wits.ac.za>
- ² *Into the future: Transforming Wits*. URL <www.wits.ac.za/tee/transformation.htm>
- ³ University of the Witwatersrand, Johannesburg. *CLTD Training manual*. URL <<http://www.wits.ac.za/depts/cult/courses/service.html>>
- ⁴ Hine, R. Feedback from Wits 'Have your say' workshops, 26 August 2004. [University of the Witwatersrand, Johannesburg.] [Internal report.] 2004.
- ⁵ University of the Witwatersrand, Johannesburg. *Operational Plan 2004: Final report to Council and to the University Community*. 2004/626 (Draft) URL <<http://www.wits.ac.za:88/vco/2004finalreportcouncil.doc>>
- ⁶ University of the Witwatersrand Library *Strategic Plan 2002-2005*. URL http://www.wits.ac.za/library/about/about_us.htm#sp (accessed 12 Jan 2005)
- ⁷ *CSI Report and Customer Monitor Analysis for Library Users – Staff*, prepared by Syndicate 2, ServiceMix (Pty) Ltd. September 2003. [Johannesburg] 2003.
- ⁸ *CSI Report and Customer Monitor Analysis for Library Users – Students*, prepared by Syndicate 2, ServiceMix (Pty) Ltd. September 2003. [Johannesburg] 2003.
- ⁹ *Assessment of Best Service Practices for Wits Library to Staff (Wartenweiler and Commerce)*. Service Mix (Pty) Ltd. September 2003. [Johannesburg] 2003.
- ¹⁰ *Assessment of Best Service Practices for Wits Library to Students (Wartenweiler and Commerce)*. Service Mix (Pty) Ltd. September 2003. [Johannesburg] 2003.
- ¹¹ Auckland University of Technology. *Library charter*. URL <http://www.aut.ac.nz/library/library_services/charter.shtml>
- ¹² California State University. *Hayward Library Service goals*. URL <<http://www.library.csuhayward.edu/goals.htm>>
- ¹³ Florida Gulf Coast University. *Mission*. URL <http://library.fgcu.edu/AboutTheLibrary/mission_pol.htm>

- ¹⁴ Gardner Library Service. *Client Charter*. URL
<<http://www.gardinerlibrary.com/default.aspx?id='/'>>
- ¹⁵ La Trobe University. Library. *Client Service Charter*. URL
<<http://alpha.lib.latrobe.edu.au/information/mw-ClientServiceCharter.html>>
- ¹⁶ Murdoch University Library. *Client Service Charter*. URL
<<http://www.lib.murdoch.edu.au/about/policies/charter.html>>
- ¹⁷ Newcastle University Library. *Customer care policy*. URL
<http://www.ncl.ac.uk/library/customer_care.pnp>
- ¹⁸ Queensland University of Technology. *QUT Library Client Charter: The Library's vision*. URL <<http://www.library.qut.edu.au>>
- ¹⁹ SOAS [School of Oriental and African Studies, University of London] *Library customer charter. Services and collections*. URL <<http://www.soas.ac.uk/library/index/index>>
- ²⁰ University College Worcester. *Peirson Library Service Charter...The Library Mission Statement*. URL
<<http://www.worc.ac.uk/services/library/about/Publications/charter2001.html>>
- ²¹ University of Adelaide. Library. *Service charter*. URL
<<http://www.library.adelaide.edu.au/uai/policy/charter.html>>
- ²² University of Auckland. *Library Service Charter*. URL
<<http://www.education.auckland.ac.nz/learning/library/about/servicecommitments.asp>>
- ²³ University of Hull. Library Services. *Charter Mark Award*. URL
<<http://www.hull.ac.uk/lib/customer/cmark.html>>
- ²⁴ University of Liverpool. Library. *Customer Charter*. URL
<http://www.liv.ac.uk/library/info/libinf_ss1.html>
- ²⁵ University of Newcastle. Library. *Library Service Charter*. URL
<<http://www.newcastle.edu.au/services/library/policies/service-charters/service-charter03.html>>
- ²⁶ University of Sydney. Library. *Client Service Charter*. URL
<<http://www.library.usyd.edu.au/about/policies/clientcharter.html>>
- ²⁷ University of Ulster. Information Services. *Student Charter*. URL
<<http://ulster.ac.uk/isd/charter>>

REGIONAL ACADEMIC LIBRARY AND INFORMATION TRAINING CONSORTIA IN THE UNITED KINGDOM AND IRELAND: A MODEL FOR SUCCESS

Dr Jean Yeoh

Head of Corporate Services,
King's College London, Strand,
London WC2R 2LS. UK
jean.yeoh@kcl.ac.uk

Abstract

Training provision through consortia has a substantial track record in the United Kingdom since their emergence in the 1970's. Since then training consortia have reconfigured and reinvented themselves in various ways and still remain a major force. Brief reference will be made to the recent history of training consortia. The paper will then largely focus on an overview of current consortia training and development activity in the higher education information sector. Consortia activity will be located in the context of current staff support frameworks and current trends in staff development and workplace learning.

CPD25, the staff development and training group for the M25 Consortium of Academic Libraries, grew out of a merger between two smaller associations following an extensive review of training and development for academic libraries in the London region. Some of the challenges facing training consortia will also be considered through an analysis of CPD25. These include funding models, charging mechanisms, organisational structures, administrative support operations, relationship to the parent consortium, competition, marketing and the evaluation of effectiveness. Finally, consideration will be given to factors which are likely to influence the future direction of academic consortia, including a new UK professional framework and the widespread introduction of virtual learning environments in higher education

Introduction

This paper will examine the current state of regional academic training and development consortia in the United Kingdom (UK) and Ireland, considering some of the challenges currently faced to ensure their continuing relevance and survival in the 21st century. There are also a number of well-established cross-sectoral training consortia incorporating various configurations of academic libraries, public libraries, health libraries (NHS) libraries and others. However the main focus of this paper will be on academic library consortia. UK academic library consortia typically include higher education institutions, specialist research organisations and national libraries.

The varied range and style of academic consortia that have developed to support the training needs of information staff in academic library and information services will be also considered. CPD25, which provides training for M25 Consortium Academic Libraries, was formed in 2002. Some of the issues that were considered when it was established, and in its current development, will be used to focus on key challenges faced to differing degrees by all academic consortia. Developing and new and areas of activity for training consortia will be identified. Lastly the paper will reflect on the transferability of such models in the international context identifying potential criteria for success.

Staff development in UK academic libraries

The most recent overview of development activity in the UK academic sector was conducted by CPD25 in 2004.¹ The survey found that staff development is largely strategically managed by library services within a structured and supportive framework. This evidence of widespread commitment at the strategic level is supported by a formal staff development infrastructure. Characteristics of development programmes included formal, written training policies, annual training plans, appraisal and annual review processes. Examples of training policies in academic libraries can be seen in a collection previously compiled by Murray and Oldroyd.² The CPD25 survey found that development activities were usually co-ordinated by a designated member of staff, often in conjunction with staff development committees. Most importantly the survey reported that continuing development is regarded as a priority at the highest level with explicit commitments documented in library strategic plans.

A large majority of university library services reported an increase in training and development activity over the previous five years. A number of reasons were cited for this including much more explicit emphasis on staff development in strategic plans. Training and development is also closely linked to organisational need and other planning goals. The use of external schemes to validate staff support processes, such as Investors in People, are also cited by some as a factor in increasing activity.³

Other influences on increasing levels of activity stem from major organisational restructuring, increasing involvement of information staff in teaching and learning programmes, engagement with virtual learning environments and legal compliance concerns. Specific compliance issues related to support for disabled users, freedom of information and data protection legislation. In addition to attendance at external conferences, visits and meetings organisations commission in house trainers for internal events. Some services made use of identified training hours, away days and annual closure days to ensure that staff had time for updating

Staff training provision

There is a rich and extensive range of organisations providing library staff development activities in the UK, demonstrating an enormous appetite for continuing professional development. Providers include commercial organisations and individual consultants. In addition national groups such as the Society of College National and University Libraries (SCONUL)⁴ take a substantial interest in staff development but their activities tend to complement rather than compete with training consortia.

The UK professional body for information staff, the Chartered Institute of Library and Information Professionals (CILIP) has a number of special interest sectoral groups. Many of these provide events without a formal administrative support structure. Academic consortia are working alongside commercial training providers from individual consultants to large companies. Increasingly academic information studies departments are also developing short course portfolios as a way of diversifying and generating additional income. Inevitably there is some duplication of effort but overall there is no evidence of oversupply of training activity

CILIP also has its own commercial training division. Consortia have a dual relationship with commercial providers. They can be seen as rivals undercutting commercial rates but by acting as commissioning agents they also place substantial business with commercial operators. Unlike regional academic consortia CILIP and other commercial providers operate on a national basis and recruit course participants from across the whole information sector.

Academic library consortia

Academic training groups are often, but not always, a subgroup of consortia groupings that have come together with the larger, overarching aim of improving the delivery of services to users. Other training groups may have a more independent relationship within the confines of robust communications mechanisms. The specific ways in which consortia improve the delivery of services to users vary and include collaborative procurement of products and services, influencing professional and government policy, promoting cross domain and cross sectoral collaboration, sharing experience and improving access for users. Staff development and training is frequently defined as an important aim of these consortia.

There has been a trend towards enlargement of consortia. For example, two urban consortia based around the Liverpool and Manchester regions merged to form a new consortium called NoWAL (North West Academic Libraries).⁵ The M25 Consortium has expanded its boundaries drawing on institutions well beyond its original London base.⁶ These mergers provide an expanded critical mass of library staff opening up new possibilities for training consortia.

History of co-operative training organisations

British training co-operatives largely emerged during the 1970's and have played an important role as training providers since then.⁷ Since then some have survived more or less in their original form, other co-operatives have died and others have developed afresh. In a recent review Philippa Dolphin refers to a resurgence of a new breed of academic library consortia in the UK in the early 1990's stimulated by an increase in student numbers and by momentum generated at national level towards collaborative working.⁸

Training consortia: the UK picture

There are a range of current models of training consortia reflecting geographic issues, historical precedents, and local needs. Some have dispersed memberships and others are based around large urban populations. The type and range of training provision varies between consortia. The following brief summary will highlight the characteristics of some specific consortia to illustrate differing approaches rather than provide a comprehensive overview of all consortia.

North West Academic Libraries (NoWAL) was founded in 2000 from a merger between two smaller groups and is a consortium of around fourteen UK university and college libraries in the North West of England. The NoWAL programme features a well-established externally validated certification scheme for para-professionals called CLIP (Certificate in Library and Information Practice). CLIP is based around gaining the required number of credits from classroom and work-based learning. An expanding range of CLIP units is being developed, some of which are aimed at professional staff who want to upgrade skills in specific areas. Other short training events are rotated at venues around the member libraries. NoWAL is also piloting a job-shadowing scheme and operates relatively informal exchange of experience events on topics of current interest. The training arm of NoWAL benefits from the services of paid administrative support. Such support is crucial to the success of CLIP, the formal qualification scheme for para-professionals.

Scottish Academic Libraries Co-operative Training Group (SALCTG⁹), established in 1986, still retains its original core membership of all Scottish higher education institutions, but membership now also includes university libraries in the north east of England and in Ireland. The remit of this group is described as “wide-ranging and permissive” with a genuinely co-operative and egalitarian style”.¹⁰ There is a small annual membership fee that allows attendance at training events at a reduced cost.

Academic and National Library Training Co-operative (ANLTC¹¹) was established in 1995, modelling itself on the success of SALCTG¹² and still maintains co-operative links with the Scottish group. This training co-operative has twelve member institutions including National Library and university libraries in the Republic of Ireland, Northern Ireland. Members are geographically dispersed and events are rotated around the institutions. ANLTC runs a programme of events and administers a Library Assistant bursary for professional development purposes.

The CPD25 training model

This paper will now turn to a detailed examination of CPD25 as an example of a functioning training consortium.¹³ As the largest academic library training consortia in the UK, CPD25 is not necessarily typical. However in many respects it faces similar challenges to those experienced by other consortia. CPD25 was created in August 2002 from two smaller training co-operatives to provide staff development support for academic libraries within the M25 Consortium. Prior to the formation of CPD25 an extensive review of existing consortia was undertaken to enable best practice to be built in to the new structure. The M25 Consortium membership stretches in all directions well beyond the confines of the infamous M25 motorway encircling London after which the Consortium was named. The furthest institution is located at Brighton on the South Coast around 75 kilometres from the centre of London. There are excellent public transport links to central London, even for institutions based outside the boundary of the M25 motorway.

CPD25 currently provides training for around 50 university and research services. The M25 consortium is a subscription based body and consortium members pay an additional annual subscription to CPD25. There is no opt out from either subscriptions and members cannot subscribe to the M25 without subscribing to CPD25. Member subscriptions fund the salary costs of the CPD25 Administrator and events are charged on a cost recovery basis. That is, events are charged at a rate that covers the costs of speakers, catering and venues and a small surplus. The subscription payment means commitment to maximising use of CPD25 rather than other providers in order to obtain best value for investment.

Events programmes

The programme of events is a mixture of sharing of experience with expertise provided by specialists and senior staff from within the Consortium, and the provision of courses run by commercial training providers. Events range from half day or whole day seminars to short programmes. Commercial providers are used particularly for legal compliance issues where it is crucial that information is factually correct. In the current year of operation examples of CPD 25 events include three-day programmes for new managers and four-day ‘pick and mix’ programmes for senior managers, short breakfast briefings for senior staff and a programme series on the teaching of information literacy skills. There are three main strands in the events programme:

- visits to information services,
- chartership programme – the chartership programme is a series of nine workshops,

- to support staff who are seeking Chartered membership of CILIP,
- seminars, workshops, short courses aimed at all levels of staff.

Activity levels have increased in the first two years of operation and Figure One below shows an increase in the number of events held and a 31% increase in the number of participants attending events. It is likely that CPD25 has achieved maximum capacity in terms of event provision based on current support arrangements and it will need to give serious consideration to future directions through its business planning processes.

Figure 1 CPD25 activity statistics 2002-3 and 2003-4

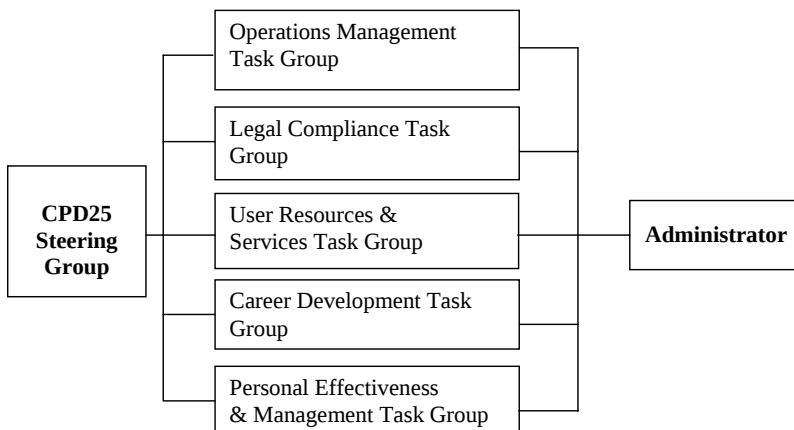
	Number of participants		Number of events held	
	2002-3	2003-4	2002-3	2003-4
Visits	180	183	17	17
Chartership	185	220	9	9
Seminars, workshops etc	683	970	27	41
Totals	1048	1373	53	67

The structure of CPD25

In order to support a relatively large programme of events a formal structure is used to support CPD25 operations. A Steering Group leads CPD25's programme and five theme-based Task Groups are responsible for planning and delivering a range of events towards the whole programme. The Steering Group consists of the Convenor of CPD25 and the Convenors of the five Task Groups. Each Task Group has 8 –10 members, is charged with a specific remit for a subject or theme area (Figure 2) and is responsible for planning and implementing events in their area. A full time Administrator is paid from consortium member subscriptions that are calculated to cover the Administrator's employment costs.

Task groups are responsible for defining topic areas their, event content and identifying speakers. Inevitably there are some event topics that cross more than one Task Group theme area and the Administrator services all Task Group meetings and can quickly identify potential duplication of effort. The Administrator is responsible for identifying venues, taking bookings, maintaining financial records and attending all events to ensure smooth running on the day. Paid administrative support removes some of the burden and uncertainty around voluntary support but the necessity of substantial input from voluntary effort of individual library staff members remains. CPD25 has a fairly complex structure (Figure 2) reflecting the need to deliver a relatively large annual programme.

Figure 2 CPD25 structure: steering group and task groups



Task group members are drawn from the staff of consortium libraries and CPD25 has between 45–50 people who have an interest in staff development, specialist expertise or simply an enthusiasm to participate. Care is taken to ensure that membership reflects the range and geographic dispersal of members, size of member institution and that there is mix of both junior and senior level of staff to ensure that strategic development issues are fully considered. Staff turnover at more junior levels in particular means that there is a constant effort to maintain task group numbers and recruit new members. In general this has not proved difficult largely because CPD25 is regarded as a successful operation to be associated with.

Challenges

The paper will now turn to address the main challenges facing regional academic training consortia by considering some of the issues faced by CPD25, options reviewed and solutions identified.

Funding models and event charging mechanisms: CPD25 was created from a merger of two smaller organisations that operated different financial support mechanisms. The London University Libraries Staff Training Group that had been in existence for a number of years charged a subscription to member libraries to apply for the costs of a part-time administrator and events are charged on a cost recovery basis. The M25 Consortium Career Development Group largely operated on a cost recovery basis only with no formal administrative support. The University of London ‘mixed economy’ model of subscription event charge and was seen to provide a robust and viable mechanism that would transfer to the proposed larger scale operation of CPD25.

Calculating event charges is a relatively straightforward process combining a number of standard factors. Core component costs of events include speakers, catering and venue costs essential although these can vary enormously. For example, event speakers may themselves be Consortium members and therefore do not charge speaker fees. Event costs are relatively low if administration is excluded. Conversely some areas of activity require high cost speakers. This is particularly true in relation to legal compliance issues such as freedom of information, disability, data protection, and intellectual property rights. Specialist experts,

often with a legal background are usually more costly causing the overall event cost to rise. CPD25 has tackled the issue of event charging for participants by setting the low cost events at a pricing level that reflects the value of the event rather than a true minimum charge. Surplus income generated from low cost events is used to subsidise high cost events. A modest surplus is retained as contingency as CPD25 is expected to be self-sufficient and cannot call on the M25 consortium for additional funds. CPD25 operates as a semi commercial provider in that it must be self-sufficient but retains the flexibility to divert funds to other areas of staff development support. For example this year the organisation has funded a travel grant for attendance at this conference and in 2004 it conducted a national survey of training activity. Spare places are advertised externally to non-subscribers and charged at a significantly higher rate to include a notional subscription element.

Income generation is not a significant part of the CPD25 remit. However CPD25 has been commissioned by the London Metropolitan Network (LMN) to provide administrative support for a specified number of training events per year.¹⁴ LMN is one of a number of regional broadband metropolitan area networks providing connectivity to the UK's national academic network. It provides links to over one hundred higher education and further education institutions in the London region. This additional income enables CPD25 to allocate funds to broader activities. This relationship has a number of valuable synergies. Events are easily marketed to both library and computing staffs allowing for greater sharing and understanding in member institutions. This is vital as some CPD25 member services are converged and computing and library staff must work increasingly closely to deliver electronic information services.

Organisational structure and administrative support: As a large training consortium CPD25 has a formal organisational structure of necessity. While much work can be conducted by email CPD25 Task Groups meet at least twice yearly and the Steering group meets on a quarterly basis. An annual plenary session is held for all steering group and task group members to come together. Event planning has to be undertaken in advance and while there is room for flexibility, smaller and looser consortium structures may be able to react more quickly to unexpected surges of demand. CPD25 programmes are planned around the UK university academic year running from August to July. The outline programme for the coming year is usually drafted by April of the preceding year. It is regarded as vital to enable individual institutions to take CPD25 programmes into account when developing internal training plans.

High quality administrative support has been crucial for CPD25 to maintain the scale of operation and to ensure that events are organised effectively. The preferred model of recruitment is by secondment from among member libraries. The post itself is regarded as providing a career development opportunity for applicants. This arrangement contributes to a strong sense of ownership among members. The first administrator was recruited from one of the more distant libraries and has assisted in raising the profile of CPD25 in her home library. With or without administrative support, all consortia remain totally dependent on considerable input from enthusiastic and energetic consortium members whose primary loyalty must be to their own workplace. This is both a strength and weakness for all consortia.

Relationship to the M25 Consortium: The CPD25 Convenor is a co-opted member of the M25 Consortium Steering Group and present regular reports of activity. CPD25 produces a biennial business plan for approval by the Consortium and also reports progress at twice yearly general consortium meetings. This enables members to be consulted fully about plans and to provide feedback on activity. Good communications are vital to ensure that training group aims are fully integrated into overall consortium goals.

Competition:- Academic consortia work alongside commercial training providers including individual consultants and large companies. The UK professional body for information staff, the Chartered Institute of Library and Information Professionals (CILIP) has its own commercial training arm. Consortia have a dual relationship with commercial providers. They can be seen as rivals undercutting commercial rates but they by acting as commissioning agents they also place business with commercial operators. However CILIP and other commercial providers operate on a national basis and recruit course participants across the whole information sector.

CPD25 does not seek to compete with other training providers and plans events solely on the basis of recruiting participants from within the Consortium. It will advertise more widely on email discussion lists as a last resort if there are spare places in order to cover costs. To date it has rarely needed to advertise beyond the consortium membership area although it does have informal links with other parts of the information sector in the London region such as health service and public sector libraries. Nevertheless consortia must keep a watching brief on other providers to avoid unnecessary duplication.

Evaluation of effectiveness and the value of membership: Both small institutions with tight budgets and large institutions with correspondingly higher staff training budgets which enable them to fund extensive in-house programmes have to justify additional expenditure on training consortia. Library services in some of the larger universities with large staffs are able to provide comprehensive in-house training programmes with sufficient staff to make the commissioning of external commercial trainers a viable option. They may feel that membership of a co-operative organisation is irrelevant. While it is true that some training programmes can be run in-house most institutions recognise the value of the opportunities for networking, sharing expertise and developing an outward looking approach.

Experience from CPD25 suggests that twin approaches are perfectly compatible. There are several large library services within CPD25 that possess both the resources and staffing levels sufficient to justify the provision of extensive internal training programmes. However they remain committed to CPD25 membership. In order to retain that commitment, members need to feel a sense of ownership and involvement. Both small and large institutions need to feel that they are equally valued and their differing needs are met. CPD25 membership includes the British Library, large institutions such as Middlesex University and smaller research libraries such as the Courtauld Institute of Art. This sense of community belonging can be more difficult to achieve in large, formally structured consortia, but CPD25 achieves engagement by ensuring that a wide spectrum of the membership is involved in its Task Groups. Task Group members frequently act as ambassadors and advocates for CPD25 within their own institutions.

Evaluating the value and impact of development activities is a challenging issue, both at the individual institutional level and at the broader consortium level. Training is regarded as important and rates highly in at strategic planning level yet the academic sector is not easily be able to define the organisational impact of its training and development investment. As in most training organisations, CPD25 requests that participants to complete event evaluation forms. It has considered commissioning an external evaluation of the impact of CPD25 on its member organisations. However, the M25 Consortium feels that while CPD25 is perceived to be successful in meeting member needs and providing events that are popular and well attended, any surplus income should be ploughed back into the events programme.

Writing about training co-operatives twenty five years ago Alan MacDougall noted that "if groups are unable to innovate...and unwilling significantly to rethink their aims, objectives and priorities, then there is a very real danger of complacency and drift".⁷ The pressure of activity associated with developing and sustaining a substantial events programme

can mean that groups fail to develop and change. The events programme can be seen as the chief tangible performance indicator of a successful consortium and therefore hinder a more strategic approach. This pitfall can be avoided by embedding a structured approach to business planning and taking time to consider the longer view.

Marketing: Academic training consortia, with their clearly defined target audience, the staffs of member institutions do not face the marketing issues of commercial training organisations. Most contact to members is by email and by the web. Nonetheless, such groups need to develop a 'product' or programme of events that meets members needs in order to remain in robust health. The name 'CPD25' has been successful in providing the training group with almost instant brand recognition, combining its core purpose and its connection with the umbrella consortium is a single memorable mnemonic.

Future directions

In April 2004 CILIP introduced a new Framework of Qualifications although the impact of this has yet to be fully realised.¹⁵ The current award of Chartership, following the completion of an undergraduate or post-graduate library and information science degree after a period of practice and an evaluative formal submission to CILIP, will continue to exist. Also continuing is the award of Fellowship for which applicants must demonstrate their contribution to the wider information profession.

New awards of Certification for para-professionals and a Revalidation scheme for Chartered members have been launched by CILIP in April this year. The Revalidation scheme is currently voluntary and Chartered members can assure their CPD by the submission of a portfolio of evidence every three years. Employer support will be important for the success of the revalidation scheme. The longer-term impact of these schemes has yet to be fully realised.

The last few years have seen rapid growth in the use of virtual learning environments in the UK higher education. There is potential role for consortia in the commissioning of high quality electronic training materials. There is also potential for more linkage or integration with training consortia from other parts of the information sector. This would need carefully managing to avoid diluting the advantages of single sector working.

With their considerable experience of commissioning trainers and consultants, consortia can act as repositories of good practice and contacts. Larger consortia may also have sufficient impact to influence national policy initiatives. Regional consortia can certainly make a contribution to regional workforce development issues. Academic consortia could develop better links or even integration with training consortia from other parts of the information sector, such as public, health and commercial library services. This would need careful management to avoid diluting the purpose of single sector working and avoid the provision of development activities that fail to meet needs in terms of focus and timing.

Transferability of UK training consortia models

Consortia of course are an international phenomenon. A survey of regional library systems in Ohio in the United States found that continuing education was an important element for member libraries.¹⁶ In a review of consortia in India resource sharing is seen as the driving force for consortia and the author makes no reference to training and development.¹⁷ However while resource sharing may be the primary reason for establishing consortia a recognition of the value of sharing expertise can lead naturally to development activities as a second phase of consortia development.

Many training consortia began life as semi-formal opportunities to exchange experience and expertise which developing into organised programmes of events. In the

international context the following are all factors that will influence the type and form of training consortia:

- geography,
- critical mass of staff/optimum size,
- transport links,
- mutual interest,
- commitment to staff development at individual and organisational level,
- leadership and enthusiasm.

However there is no single model that is more effective than others are. Requirements for a successful training consortium are most heavily dependent on a recognition of the value of training and development within member organisations, a community of common interest and strong leadership and determination.

References

- ¹ Yeoh, J., Straw V. & Holebrook C (2004). *Staff Development and Continuing Professional Education: Policy and Practice in Academic Libraries Within the M25 (CPD25), NoWAL and SALCTG Consortia and Oxford University*. URL <<http://www.cpd25.ac.uk/Report.pdf>>
- ² Murray, A. & Oldroyd, M. *Working Papers on Staff Development Policies*. London: SCONUL, 2002.
- ³ Investors in People UK. URL <<http://www.iipuk.co.uk/IIP/Web/default.htm>>
- ⁴ SCONUL. URL <<http://www.sconul.ac.uk/>>
- ⁵ North West Academic Libraries. URL <<http://www.nowal.ac.uk/training/index.htm>>
- ⁶ M25 Consortium of academic libraries. URL <<http://www.m25lib.ac.uk/>>
- ⁷ MacDougall, A. Cooperative training: the past present and future. In: MacDougall, A. & Prytherch, R. *Cooperative Training in Libraries*. Aldershot: Gower, 1989.
- ⁸ Dolphin, P., Collaborative staff development. In: Oldroyd, M. (ed.) *Developing Academic Library Staff for Success*. London: Facet Publishing, 2004.
- ⁹ Scottish Academic Libraries Co-operative Training Group (SALCTG). URL <<http://www.jiscmail.ac.uk/files/LIS-SALCTG/welcome.html>>
- ¹⁰ Ulas, E.. Scottish academic libraries co-operative training group (SALCTG). *SCONUL Newsletter* 2002, 25, 18.
- ¹¹ Academic and National Library Training Co-operative (ANLTC) URL <<http://www.anltc.ie/>>
- ¹² Fallon, H. & Cox, J., Staffing and staff development in Irish university libraries. *SCONUL Newsletter*, 2002, 25, 19-21.
- ¹³ CPD25. URL <<http://www.cpd25.ac.uk/>>
- ¹⁴ London Metropolitan Network (LMN). URL<<http://www.lmn.net.uk/>>
- ¹⁵ Chartered Institute of Library and Information Professionals (CILIP). URL <<http://www.cilip.org.uk/default.cilip>>
- ¹⁶ Schneider, T.N., Academic libraries and regional systems: how do they stand today? *Journal of Academic Librarianship* 2002, 28 (3), 141-146.
- ¹⁷ Pathak, S. K. & Deshpande, N., Importance of consortia in developing countries –an Indian scenario. *Journal of Academic Librarianship* 2004, 36 (3), 227-231.