



An Investment in Learning:

A Proposed Plan for Learning, Training, and Professional Development
for the Rutgers University Libraries

**Developed by the Rutgers University Libraries
Steering Committee on Training and Development
August 2000**

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“... For in the knowledge society clearly more and more knowledge, and especially advanced knowledge, will be acquired well past the age of formal schooling, and increasingly, perhaps, in and through educational processes that do not center on the traditional school – for example, systematic continuing education offered at the place of employment....”

**Peter Drucker
Management in a time of great change.
1995. p. 234-235.**

Executive Summary

As the information environment that envelops our work in the Rutgers University Libraries has changed radically over the recent past, with technology-driven change promising to accelerate at an even faster pace in the years ahead, **it is critical that we recognize that learning is continuous, that it is integral to our work and the way that we carry out our assignments, and that it is a responsibility that we share as individuals and as members of our organization.** Apart from the changing sets of technical skills and fluencies that we need to have to do our work effectively, the demands of the new workplace call for new sets of “soft skills” – in problem-solving and decision-making, in interpersonal relations, and in working within a team or group environment. Strong “people” skills are essential for success in the new change-based work environment where the tasks are complex and effective communication is critical.

“An Investment in Learning,” this proposed plan, seeks to assist the Libraries in creating a learning environment that supports the Libraries’ mission and **“A Bridge to the Future: The Rutgers Digital Library Initiative,”** its multi-year plan. Hopefully, it will enable our librarians and staff – at all levels – to have or to begin to acquire the kinds of skill sets and expertise that are needed.

In June 1999, University Librarian Marianne Gaunt initiated a systemwide review of training needs and how training is handled within the Libraries with the goal of developing a comprehensive training plan for the Libraries. A steering committee of librarians and library staff was appointed, with representation from the three campuses, the diverse functional areas, and the Libraries’ Human Resources Office. Professor Mark Winston, School of Communication, Information, and Library Studies (SCILS), served as a consultant to the committee.

The committee educated itself with respect to current thinking in three broad areas – the information environment, the changing workplace, and effective learning and training programs – as background for its work. It developed a philosophical statement and a mission statement as a framework for the plan. It developed two needs assessment instruments – one aimed at systemwide committees within the Libraries, and another aimed at individuals working in the Libraries.

The **first needs assessment instrument** consisted of **six broad, open-ended questions** on needed key competencies and skills over a two-year period and over a five-year period, prior training/learning sponsored by the committee, new kinds of instructional delivery or learning modules that the committee might be interested in exploring or developing, and what a useful website for learning and training might contain. The responses were thoughtful, indicating needs in areas ranging from assessment methodologies to digital resources and services to organizational and personal skills. There was a keen interest exhibited in exploring new

technologies in support of learning, and there were many suggestions made about the contents of a website. **These responses, many of them technological, can be addressed programmatically as part of the proposed plan**, with representatives from the Libraries' diverse committees participating in the program development processes.

The **second instrument, aimed at individuals** within the Libraries, consisted of questions arranged by thirteen content categories, including personal and career development, working in a team/working in a group, keeping healthy and safe, knowing about hardware and software, and using digital and media resources. Each question was addressed from three points of view – current skills, desire to learn more, and important skills. The survey was administered to 298 librarians and staff, with **210 persons completing it, a response rate of 70%**. It was analyzed by Professor Mark Winston and Research Assistant Dan W. Noonan of SCILS. From our perspective, **the most important set of results was the “Learn More” viewpoint, i.e., the skills and topics that the respondents noted that they want or need to learn more about.** The top 25 rankings of these skills are presented as key, as well as correlations of these skills among the three points of view and with the five skills that individuals believed would benefit them most. Soft or “people” skills and selected basic technical skills emerged as being among the highest priorities. Included are stress management, time management, PowerPoint, effective oral-written communications, managing priorities, Excel, managing change, problem-solving, working with difficult people, conflict resolution, and decision-making. These skills can be addressed programmatically in the proposed plan.

The proposed plan is presented through a series of ten recommendations that the steering committee believes **will build an environment for learning**. The recommendations are as follows:

1. **Make learning integral to the carrying out of the Libraries' mission, its long-range plan, and its short-term goals.**
2. **Provide for learning and training that is continuous – getting to the heart of the matter.**
3. **Provide appropriate structures for the effective coordination and support of the learning, training, and development plan.**
4. **Address the priority learning and training needs made evident by the individual and committee needs assessments.**
5. **Focus on the development of effective instructional design as a way to facilitate and enhance learning.**
6. **Make effective use of staff resources Web pages for learning, training, and development.**
7. **Use technologies to facilitate and enhance learning.**
8. **Create an “Institute for Library Leadership in the Digital Environment” to foster learning at all levels within the Libraries.**
9. **Develop learning and training partnerships/participate in external programs.**
10. **Build an environment for learning.**

The committee views these recommendations as **interlocking component parts**, steps that will be important as we move through years of fast-paced change. The conceptual move that we have

made – **from training to learning** - reaffirms this thinking and acknowledges the significant investment in learning that has, clearly, been made and that we know will continue as we seek to attain our organizational aspirations.

Table of Contents

Executive Summary	3
Part One. Background Activities	7
Part Two. Survey Analyses and Results	12
“RUL Training and Development Needs Assessment” (for Individuals)	12
“Questions on Training and Development for Systemwide Committees”	16
Part Three. The Proposed Plan: Recommendations	20
1. Make Learning Integral to the Carrying Out of the Libraries’ Mission, its Long-Range Plan, and its Short-Term Goals	21
2. Provide for Learning and Training that is Continuous	23
3. Provide Appropriate Structures for the Effective Coordination and Support of the Learning, Training, and Development Plan	24
4. Address the Priority Learning and Training Needs Made Evident by the Individual and Committee-Based Needs Assessments	26
5. Focus on the Development of Effective Instructional Design as a way to Facilitate and Enhance Learning	30
6. Make Effective Use of Staff Resources Web Pages for Learning, Training, and Development	31
7. Use Technologies to Facilitate and Enhance Learning	32
8. Create an “Institute for Library Leadership in the Digital Environment” to Foster Leadership at All Levels within the Rutgers Libraries...	34
9. Develop Learning and Training Partnerships/Participate in External Programs	36
10. Build an Environment for Learning	37

Appendices

- 1. Letter of appointment of Steering Committee**
- 2. RUL Training and Development Needs Assessment Survey (instrument)**
- 3. RUL Training and Development Needs Assessment Survey 2000 Analysis (excerpts)**
- 4. Responses to Questions on Training and Development for Systemwide Committees**

**An Investment in Learning:
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As the information environment that envelops our work in the Libraries has changed radically over the recent past, with technology-driven change promising to accelerate at an even faster pace in the years ahead, it is critical that we recognize that learning is continuous, that it is integral to our work and the way that we carry out our assignments, and that it is a responsibility that we share as individuals and as members of our organization. Apart from the changing sets of technical skills and fluencies that we need to have to do our work effectively, the demands of the new workplace call for new sets of “soft skills” – in problem-solving, interpersonal relations, and in working within a team environment. Strong “people” skills are essential for success in the new change-based work environment where the tasks are complex and communication critical.

We are, in fact, moving toward what is being called a “learning society” where change is a constant and where lifelong learning is taking on a new significance. As part of this movement, we are seeing a growing recognition of the value of learning, including learning in the workplace, and of the importance of learning programs and activities that are responsive to the new and changing needs.

“**An Investment in Learning**” seeks to assist the Libraries in creating a learning environment that supports the Libraries’ mission and “**A Bridge to the Future: The Rutgers Digital Library Initiative**,” its multi-year plan. Hopefully, it will enable our librarians and staff - at all levels - to have or to begin to acquire the kinds of skill sets and expertise that are needed.

The plan traces the initial work and data gathering of the Libraries’ Steering Committee on Training and Development as it sought to consider the salient issues pertinent to learning and training, summarizes the key findings of the committee’s two major surveys, and presents a set of recommendations that is responsive to the data and to the perceived requirements of the long-range plan. This work is presented in three parts: **Background Activities, Survey Analyses and Results**, and the **Proposed Plan: Recommendations**.

Part One. Background Activities.

**Steering Committee on Training and Development:
Appointment, Membership, Charge.**

In June 1999, University Librarian Marianne Gaunt initiated a systemwide review of training needs and how training is handled within the Libraries with the goal of developing a comprehensive training plan for the Libraries. A steering committee on training and development was appointed, with **Lynn Mullins**, Director of the Dana Library, serving as chair. Steering committee membership was as follows: **Jeanne Boyle, Catherine Geddis (who served until June 2000), Gary Golden, Jackie Mardikian, Ann Montanaro, Francoise Puniello, Gracemary Smulewitz, Sandra Troy, Farideh Tehrani, and Linda Turzynski**. The steering committee included librarians and staff, representation from the three campuses and the diverse functional areas, and the two personnel officers in the Libraries’ Human Resources Department.

Early on, the committee asked **Professor Mark Winston**, School of Communication, Information, and Library Studies (SCILS), who has expertise in human resources within libraries and in needs assessment, if he would serve as a consultant, and was fortunate that he agreed to serve in this capacity.

The charge to the steering committee included developing a needs assessment instrument for distribution throughout the Libraries, analyzing the data gathered, and making recommendations for an appropriate support structure for a strengthened training and development program. To carry out this charge, the committee met approximately every two weeks throughout the fourteen-month period.

Initial Work of the Steering Committee: Link to Long-Range Plan

The steering committee began its task by agreeing that the proposed plan should be integrally linked to the Libraries' long-range plan as a way of insuring that the librarians and staff within the Libraries would have the appropriate expertise and skills for the effective implementation of the long-range plan. The directions outlined in the Libraries' long-range plan will move the Libraries into a more digital working environment and serve as a guideline, in part, for the proposed learning/training plan. These directions included the following:

- ◆ **Developing a user-centered information technology infrastructure**
- ◆ **Designing more effective services using technologies**
- ◆ **Acquiring, organizing, and disseminating digital content**
- ◆ **Creating, in partnership with others within the university, multimedia content**
- ◆ **Continuously assessing the impact of the information technologies and making appropriate improvements**

This meant, from the steering committee's perspective, that any needs assessment instruments that we would develop would seek to identify needs for current and anticipated learning/training in these areas.

Self-Education of the Steering Committee

Committee members believed that a literature/Web review in three broad areas – **the information environment, the changing workplace, and effective learning and training programs in practice elsewhere** - would serve to bring to the fore current national thinking as background for the steering committee's work. Since it was essentially dealing with continuing/workplace education, the committee's self-education in these areas was considered an essential first step in the undertaking of its task.

Understanding the Challenges Presented by the New Information Environment

A brief literature review conducted by the steering committee indicated that there were, clearly, many substantive challenges presented by the new information environment. A few of the key challenges that were affecting or that would affect our work were the following:

- ◆ **Rapidly and continuously changing information technologies, including new interactive/multimedia technologies**
- ◆ **Reliance on networked information**
- ◆ **Focus on assisting and providing information for remote users**
- ◆ **Emergence of new systems of scholarly communication**
- ◆ **Increased importance of intellectual property and copyright in the digital environment**
- ◆ **Need for information literacy/fluency**
- ◆ **Need to manage information/knowledge, including working with new “enterprise” (across the organization) systems, such as the SIRSI Unicorn system within the Libraries and the new Oracle-based administrative computing system being planned for the university**

The steering committee realized that there were and will be many other challenges, but these were identified as being among the most basic. Any learning/training program that we would develop would have as its context these kinds of global changes and challenges. There are sets of technical skills associated with some of these areas, and the ability to acquire new technical and associated management skills and expertise will be, increasingly, of value for success in the workplace. Skill sets identifiable for some of these areas would be incorporated into the questionnaire to be developed for everyone in the Libraries.

Considering the Current and Future Characteristics of the Workplace

Again, a brief literature review indicated some of the ways that the workplace was changing. Only a few of the most salient changes are the following:

- ◆ **Importance of adaptability to change**
- ◆ **Attention directed at the quality of services provided**
- ◆ **Attention directed at performance and accountability**
- ◆ **Participation in group, project, and team work and in local problem-solving**

These factors, too, would serve as a context for any plan that we would develop. What was becoming important was the idea that “soft skills,” such as the skills necessary to work

effectively with others on group or on team projects, would be critical to the carrying out of work in the changing environment. Again, skill sets for some of these areas would be incorporated into the questionnaire to be developed. The steering committee believed that it would be important to know which skill sets were of high priority for our library community.

Identifying “Best Practices” in Learning, Training, and Development

This part of the literature review set out to identify some of the “best practices” in use in learning, training, and professional development at other institutions, whether in effect at other Association of Research Libraries members or in corporate or non-profit organizational settings. The committee was especially interested in finding out about current thinking about and good practice in technology-based learning, adult learning, and the identification of information competencies and the relationship of these competencies to learning/training programs. Among the areas the steering committee looked at were the following:

- ◆ **Training for effective information technology usage**
- ◆ **New ways to deliver training programs using technologies**
- ◆ **Web-based training programs and modules**
- ◆ **Adaptability and flexibility of adult learning programs**
- ◆ **Information competencies for librarians and staff**

The journals *Training* and *Training and Development Journal*, reflecting the perspectives of the professional training community, were particularly useful. Additionally, as the broader library community began to focus attention on information competencies and as listings of competencies were being developed by professional societies and by some libraries, the steering committee obtained sample listings, using them as a basis for discussion.

A Sense of Philosophy and Purpose

Early on, the steering committee believed that the development of an overarching philosophical statement would serve as a guide to a new learning and training program. The development of such a statement served to frame discussions and to clarify committee thinking about the kind of philosophy that would be most appropriate for the Libraries. Key points in the statement were that learning is the shared responsibility of the Libraries as an organization and of each individual, that learning is an essential component of our work, that learning is ongoing and continuous, and that it embraces job-related and broader issues and concerns.

As part of the clarification of the steering committee’s thinking, a mission statement was also developed. The statement was at first a guide for the work of the committee, and toward the end of the fourteen-month process (with some modification) it became a statement of purpose to be incorporated into the final plan. The complete philosophy and mission statements are included as part of **recommendation 1**, in part three.

Development of Two Kinds of Needs Assessment Instruments

The steering committee then set about to develop two kinds of needs assessment instruments – one that would be aimed at systemwide committees, and another instrument that would be distributed to everyone in the Libraries. The first instrument was a series of **six broad, open-ended questions** that the committee hoped would help it understand the nature of the needs for learning/training, as perceived by members of **systemwide committees**.

The second instrument was a detailed ten-page survey of skills/topical areas, to be completed by everyone working in the Libraries. This “**RUL Training and Professional Development Needs Assessment**” would provide data based on **individual perceptions** of their needs for learning/training in the respective content areas.

In this way, the steering committee hoped to gain a good picture of the nature and extent of the needs, as expressed both by committees and by individuals. A great deal of time was spent by the committee developing the ten-page survey, with this development work serving as a framework for many good discussions on the diverse aspects of workplace learning and training.

Part two includes a discussion and analyses of the two surveys and the salient findings. The data analyses for the individual needs assessment are excerpted as appendix 3, with the full report (with its more than 750 detailed statistical tables), available as a separate document. The full systemwide committee responses are included as appendix 4.

Communication to Members of the Rutgers University Libraries

The steering committee reported, through the chair, on the progress that it had made at the state of the libraries meeting November 9, 1999. Brief write-ups also appeared in the Libraries’ *Agenda* as a way to insure that the Libraries’ community was aware of the work of the steering committee. As the committee moved closer to distributing the six-question survey to the systemwide committees, a letter was developed that explained the purpose of the survey, which was sent to the selected committees. The positive response indicated the keen interest that was exhibited by the committees that participated in the questionnaire completion. In Spring 2000, as the committee began planning for the administration of the individual survey, notices were disseminated by email to everyone in the Libraries, informing them of places and times where they could obtain and complete the survey. This implementation method was selected to insure that the response would be as high as possible. The response level indicated that the interest in learning and training and professional development was strong.

Conversations with Rutgers Experts

As the data analyses took place, the steering committee held conversations with several Rutgers experts – **Karen Novick**, Director of Professional Development Studies at SCILS; **Dr. Robert E. Nahory**, Director of Media Technology Research and Outreach on the Newark Campus; **Marcie Anszperger**, Manager of Staff Computer Literacy Training, Teaching Excellence Center-NB; and **Eva Michna**, Associate Director, New Brunswick Computing Service, Rutgers University Computing Services (RUCS). These conversations enabled the committee to gain a better

perspective on the kinds of programs in place elsewhere in the university and led to the development of two of our recommendations.

Part Two. Survey Analyses and Results

As noted above, the steering committee conducted two needs assessments – one aimed at systemwide committees (“Questions on Training and Development for Systemwide Committees”, Fall 1999) and the second aimed at individuals working in the Libraries (“RUL Training and Professional Development Needs Assessment Survey”, Spring 2000), the two collectively known as “Survey 2000.” Committee responses to the broad questions, included as appendix four, are presented in this section in summary form. The responses to the individual needs assessment survey were analyzed by **Mark Winston, Professor at SCILS, and Daniel W. Noonan, Research Assistant**. Appendix three includes a narrative and tabular excerpt from the full report, which (because of its very large size) is included as an accompanying document. This section includes highlights taken from the full report by Winston and Noonan.

“RUL Training and Development Needs Assessment” (for individuals)

Rationale, content, administration (excerpted from the Winston and Noonan report)

The goals of the survey were to assist in the development of learning and training programs for Rutgers librarians and library staff. The survey consisted of two parts.

Part one of the survey was divided into thirteen categories:

- A. Personal and Career Development**
- B. Working in a Diverse Environment**
- C. Working on a Team/Working in a Group**
- D. Understanding Jobs**
- E. Developing Supervisory and Management Skills**
- F. Knowing about Hardware and Software**
- G. Keeping Healthy and Safe**
- H. Working in Public Services**
- I. Teaching and Learning**
- J. Working with Collections**
- K. Using Digital and Media Resources**
- L. Keeping Current with SIRSI Unicorn**
- M. Scholarly Communications and Copyright**

The thirteen categories include a total of 172 questions, with each question addressed from three points of view:

- ◆ **Current Skills** – “My current job requires this skill/topic.”
- ◆ **Learn More** – “I need to learn more about this skill/topic.”
- ◆ **Important Skills** – “This skill/topic is important for my future career development.”

The three points of view could be answered four different ways: Yes, no, not sure, and no answer.

Part two of the survey consisted of fifteen questions that addressed categorization of the personnel who completed the survey, their preferred manner of receiving information and training, when and where training would be most convenient, identifying the five most beneficial topics or skills listed in part one of the survey, and additional comments.

The survey was administered to **298 RUL staff members, including 210 staff members (Administrative, professional, supervisory and COLT union) and 88 library faculty members**, including temporary Librarian V's and Cabinet. It was not administered to voucher employees, student employees, or graduate assistants. A total of **210 surveys were completed** and returned, **a completion rate of 70%**. This was a relatively high response rate, and we believe that the steering committee's plan to administer the survey at particular places and times was a factor that contributed to this. An additional survey was completed, but was not received in time to be included in the data analysis.

Rankings analysis

The surveys were analyzed, and a database of more than 550 variables was constructed in SPSS software. Reports were generated for frequencies for all possible answers for each point of view for each of the questions, and the information was input into Excel spreadsheets for ranking. **For each point of view, the top twenty-five (or more due to ties in rankings) skills or topics were listed.** For our purposes, **the most important set of results was the "Learn More" viewpoint. These are the skills and topics about which the respondents noted that they want or need to learn more.**

Salient findings

Following is a small selection of the key findings: the top 25 rankings of "Learn More" variables, the closest correlating skills or topics among the three points of view, and correlations between the "Top 25 Learn More" and "Skills that would benefit you most." These findings are incorporated into **recommendation 4**, as reported in part three.

Top-25 Ranking of "Learn More" Variables

Rank	Variable #	Variable Description	Yes	%
1	a24	A. Working w/Difficult People: Learn More	147	70.00
2	a14	A. Problem Solving: Learn More	143	68.10
3	a18	A. Stress Management: Learn More	142	67.62
4	a05	A. Decision Making: Learn More	141	67.14
4	g10	G. Stress Management: Learn More	141	67.14
6	a11	A. Managing Change: Learn More	139	66.19
6	g05	G. Ergonomics (working w/computers): Learn More	139	66.19
8	a09	A. Leadership Development: Learn More	138	65.71
8	f09b	F. Browsers - Netscape: Learn More	138	65.71
10	a12	A. Managing Priorities: Learn More	135	64.29
10	e17	E. Using Training/Learning Websites: Learn More	135	64.29
10	f05a	F. Spreadsheet - Excel: Learn More	135	64.29
10	f10g	F. Powerpoint: Learn More	135	64.29
10	g04	G. Emergency Procedures: Learn More	135	64.29
15	a07	A. Effective Oral/Written Comm: Learn More	134	63.81
15	a19	A. Time Management: Learn More	134	63.81
15	c03	C. Conflict Resolution: Learn More	134	63.81
15	f07a	F. E-mail - Netscape: Learn More	134	63.81
19	f04a	F. Word Processing - Word: Learn More	133	63.33
20	a04	A. Critical Thinking: Learn More	131	62.38
20	a06	A. Effective Meetings: Learn More	131	62.38
22	a23	A. Understanding Univ. Priorities: Learn More	127	60.48
22	c01	C. Building Learning into Daily Life: Learn More	127	60.48
24	f03	F. Sharing Docs on the Libraries' Network: Learn More	126	60.00
25	e02	E. Effective Oral/Written Comm: Learn More	125	59.52
25	f01	F. Basic Computer Use: Learn More	125	59.52
25	f08b	F. E-mail Management - Organizing E-mail: Learn More	125	59.52

Rank “Learn More”	Rank “Current Skills”	Rank “Important Skills”	Variable #	Variable description
1	13	14	a24	Working with Difficult People
2	3	1	a14	Problem Solving
4	4	1	a05	Decision Making
8	7	7	f09b	Browsers - Netscape
15	21	14	c03	Conflict Resolution
19	18	11	f04a	Word Processing - Word
22	18	19	c01	Building Learning into Daily Life
24	24	19	f03	Sharing Docs on the Libraries' Network
25	21	29	f08b	E-mail Management - Organizing E-mail

Rank “Skills That Would Benefit You Most”	Rank “Learn More”	Variable #	Variable description
1	3	a18	Stress management
2	15	a19	Time Management
3	10	f10g	PowerPoint
5	15	a07	Effective Oral/Written Communications
5	10	a12	Managing Priorities
5	10	f05a	Spreadsheet - Excel
9	6	a11	Managing Change
12	2	a14	Problem Solving
12	1	a24	Working with Difficult People
16	15	c03	Conflict Resolution
20	4	a05	Decision Making
20	20	a06	Effective Meetings

The above three tables provide data that can be used for the development of programs that are of high priority to our librarians and staff, as discussed in part three of this report.

Additionally, the data indicate that 80% of the respondents felt that ongoing educational and training opportunities were important or very important to them; that email is by far (70%) the manner in which Rutgers librarians and staff want to be notified about educational and learning opportunities; and that classroom instruction with a teacher is the preferred method of learning for 54% of the respondents, with one-on-one instruction and learning on one's own coming in second and third at 19% and 18%, respectively. The preferred learning situation was not clear-cut, with learning within the department ranking first, with 26% of the respondents choosing it, and learning in a one-on-one situation a close second at 24%. Additionally, there appears to be a strong correlation between the campus on which one works and where one would like his or her training opportunities. Wednesday was the most popular day chosen for educational and training opportunities, selected by 65% of the respondents, with 62% of the respondents also showing a desire for Tuesday and Thursday training. Mornings were a favorite for programs (68%), and June was the number one month for program offerings (57%).

There were many other useful analyses, including the “Top-5” skills by job classification, i.e., the **top five skills ranked by librarians, by administrative/professional/supervisory employees, and by staff members**. These data are particularly interesting and helpful for targeted workshop and program development for each of these three constituencies, and, as such, are included in part three in support of **recommendations 4 and 8**. In addition, the **top three skills/topics are listed for each of the “A to M” content categories in the survey tables** that provide data on the way that the various skills and topics within a broad category, such as “Understanding Jobs” or “Using Digital and Media Resources”, are perceived and ranked.

The analyses of the “**Current Skills**” (“My current job requires this skill/topic”) and the “**Important Skills**” (“This skill/topic is important for my future career development”) are also important and can be used in future program planning.

All in all, the data present an extremely interesting snapshot of the people working for the Libraries at this time with respect to their need for and interest in learning and training.

“Questions on Training and Development for Systemwide Committees”

Committees, questions, administration

Eleven systemwide committees participated in the needs assessment survey, with these committees asked to identify the learning/training needs in their areas of responsibility.

- ◆ **Advisory Committee on Diversity**
- ◆ **Assessment Committee**
- ◆ **Cabinet**
- ◆ **Collection Development Council**
- ◆ **Coordinating Committee**
- ◆ **Health and Safety Committee**
- ◆ **PC Working Group**
- ◆ **Planning Committee**
- ◆ **Public Services Council**
- ◆ **Technical Services Council**
- ◆ **Web Advisory Committee**

Six broad questions were asked of each committee, with the respective committee chairs handling the discussions within the committee, completing the survey, and returning it to the steering committee. The questions were distributed in November and December 1999. The steering committee reviewed the responses and incorporated a number of the suggested competencies and areas of expertise into the individual needs assessment instrument.

Salient findings

The responses were considered to be qualitative data and were reviewed and discussed by the steering committee. No attempt was made to rank or prioritize the responses. The following are highlights of some of the responses, aggregated by question. The complete responses, arranged by committee, are included as appendix 4.

1. What are the competencies or skills or areas of expertise that your committee thinks are or will be needed by committee members or by others in the Libraries over the next two years that will require training or learning?

The competencies and skills are noted by broad category, as follows: **assessment methodologies** (focus groups, statistical analysis, surveys, etc.), **collection management** (collection assessment, collection development policies in the new environment, cost-benefit analysis, diversity as part of collection development, electronic resources evaluation, program review preparation, etc.), **digital resources and services** (database training by vendors, electronic archiving, handling large files, multimedia, networked indexes, online reference, search engines – selection, evaluation, use), **diversity** (awareness, mentoring, responsiveness to insensitive patrons, sensitivity to foreign languages, etc.), to **facilities** (changes in building environments, high-technology facilities management, telecommunication management, etc.), and **health and safety** (CPR certification, emergencies, ergonomics awareness, exercise, fire emergencies, physical handling of books, mental health, nutrition and weight management, stress management, etc.).

The competencies and skills also included: **higher education** (changing accreditation standards, distance education, K-12 relationships and services, technologies and learning), **information** (globalization, information literacy, information management and information overload, information technologies, information user and user behavior), **job analysis** (basic/core competencies - defining, inventory development, addressing), **librarianship** (major issues and changes, including leading edge programs and digital library development and management), **organizational and personal skills** (advocacy and lobbying, budget modeling, vendor negotiation, change management, coaching, collaborative work, communication, email management, effective meetings and programs, leadership and management, role of faculty within the organization, stress reduction and burnout avoidance, supervisory skills, team participation, time management, working with ambiguities, flexibility), **public services** (dealing with patrons, standards for “acceptable” service, etc.), **copyright and intellectual property, software** (desktop applications, “new media”, SIRSI Unicorn – Workflows, Windows 2000, word processing, etc.), and **Technical Services** (changes in).

Clearly, there is a great range of topics for programmatic learning, with the surveys themselves providing some context. These suggestions are included in part three as part of **recommendations 4 and 8**.

2. Are there other competencies or skills or expertise that you believe will be critical to your committee’s work as the Libraries implement the long-range plan over the five-year period?

Many of the same competencies were noted. Following are a selection of items not previously mentioned, though aggregated under similar categories: **digital resources and services** (continuously shifting and upgrading platforms, Internet II usage, local database creation - SiteSearch, Listservs and Web interfaces, managing public workstations, scanning and image manipulation, search refinement tools, virtual collaboration, Web page design and

editing), **diversity** (incorporating diversity responsiveness into performance measurement, international awareness day programs, language coping skills for public services personnel, programs for transfer students, global perspectives), **health and safety** (change – the primacy of technological change, the way work is carried out - including more group and team work, living with violence and disasters, workplace stress, dealing with difficult people), **instructional technology** (including multimedia creation), **job analysis** (alternate work flows, work and cost effectiveness), **knowledge management, learning** (balance between the individual and the team, learning how to learn, learning when we work), **multimedia hardware, organizational and personal skills** (building a common vision, consensus building, facilitating role of leaders, motivating people, “people” networking/cultivating contacts, sharing work, etc.), **public services** (users – needs assessment – who are our users, including off-site users, what are their needs, how do we address these changing needs), and **technical services** (evaluation of Web resources for cataloging, metadata).

The **Health and Safety Committee** was particularly prescient (in terms of what the individual needs assessment survey evidenced): “From the committee’s viewpoint, **we see change as the primary force in the long run that will necessitate particular programs. That is, rapid and constant technological change, changes in the way work is carried out**, i.e., more group process and team work; and living with life threatening violence, disasters, demonstrations, and people with emotional problems. **We envision more stress in the workplace developing out of work situations**, harassment, and external pressures, and recommend programs to enhance stress reduction, coping with change, and dealing with problem people and disaster/emergency situations.”

Clearly, this listing, with its longer-term perspective, offers many areas for programmatic development. **recommendations 4 and 8**, in part three, seek to address, in part, these suggestions.

3. Has your committee sponsored or offered any training activities over the past few years? If so, please list these activities and comment as desired.

Most of the committees had, indeed, sponsored learning/training programs, presented in a variety of formats, some more formal than others. Selected responses are as follows:

Cabinet	Fund-raising; strategic planning; budget modeling; copyright; scholarly communication
Collection Development Council	Fund management; electronic resources evaluation
Coordinating Committee	Library faculty meeting discussions in areas such as distance education and virtual reference
Diversity Committee	Literary series, seminars, workshops, and symposia on cultural activities (including theater participation); internship/residency program; disability workshops; diversity fairs;

	additional human resources workshops
Health and Safety Committee	Fire and emergencies; CPR training; ergonomics discussion
Planning Committee	Library faculty program on publishing, pricing of journals, copyright; teaching and library faculty attendance at national conference on similar issues
Public Services Council	Unicorn training (Access Services); instruction experience (Instructional Services); library faculty discussion on acquiring networked resources; planning – what shall we do/how shall we do it (Joint Standing Advisory Committee/Planning Committee)
Technical Services Council	LIS training sessions; introduction to the Internet and digital libraries; participation in VALE
Web Advisory Group	Training on the Libraries’ website; Netscape tips and tricks; Libraries’ network infrastructure; effective meetings and the use of teleconferencing

There is, clearly, much that has been done and much to build on.

4. Are there new kinds of instructional delivery or learning modules that your committee might be interested in exploring or developing over the next few years?

The suggestions ranged over many areas. These included the following: distance learning tutorials/module development (including Web-based module development), documentation, graphics for Web design, links to vendor tutorials, LIS training through online tutorials, PowerPoint and other presentations, RUL-TV, orientation to the Libraries’ website, student training in diverse areas, teleconferencing/videoconferencing, taping of programs, integration of video into reports, virtual public services, and Web-based design (guidelines).

These and other suggestions are included in part three as **recommendation 7**.

5. What else would you like the steering committee to know about or consider with respect to the development of an effective training and learning program for the Libraries?

This question elicited a variety of responses, and a selection follows (in no particular order): the role/restructuring of the human resources office, targeting learning/training programs, the “learning organization”, use of diverse formats in program development, assessment of

programs on a periodic basis, commitment to and adequacy of funding for programs, normalization of training/integration of training into worklife, individuals who attend external training sessions must make a commitment to train others, increased funding for external conference attendance;

Additional suggestions were: development of basic/core competencies, minimum standards and competencies for temporary employees (including student employees), universal skills for student workers, staff, and faculty (e.g., interacting with the public – at the public desk and on the telephone), focus training on key issues, hold workshops on specific indexes, technology education should promote inclusiveness, sensitivity to and awareness of Camden and Newark as integral components of the university, program sharing through use of remote and distance training programs on a tri-campus basis, leadership skills training as part of diversity training, expanded fund-raising basis for diversity training, and easy access to the Libraries' website with appropriate links to external websites.

And more suggestions were: new hires need to have an introduction to computing within the Libraries, training sessions should be interactive, there should be standardized scripts for trainers, attention should be paid to differing learning styles (through the use of interactive CDs, Web-based tutorials, and video presentations), we should participate in university-wide training programs, there should be follow-ups to and assessments of LIS training, different models of training should be tried, increased software support and library operation support expertise, training needs to be continuous and ongoing, there should be some continuity in trainers and an improved structure for training, keeping up with technology, and a concern about the number of library faculty representatives on the steering committee.

Again, there was much for the committee to think about, with many of the suggestions incorporated into the various recommendations.

6. What might a useful website for learning and training contain?

Responses to this question included the following: training documentation, program announcements, contact persons for additional information, FAQ's, instruction for trainers, information about learning, a "library" of workshops, links to other training sites, an online suggestion box, PowerPoint demos, and training resources.

Many of these suggestions were incorporated into **recommendation 6**, in part three.

Part Three. The Proposed Plan: Recommendations

To advance the investment in learning that we believe is the underpinning of a plan that addresses the current and future workplace learning needs of our librarians and staff as we seek to strengthen and carry out our service programs to the university's diverse communities, we offer the following recommendations:

- 1. Make learning integral to the carrying out of the Libraries' mission, its long-range plan, and its short-term goals.**

We recommend that the Libraries make a concerted effort to develop a learning/training/development program that supports the Libraries' mission and long-range plan.

We believe that this program will require the acceptance of a shared philosophy of learning and training and the delineation of a mission and set of objectives that can serve as a guiding framework. In this spirit, we offer the following:

a) **Philosophy**

As we move into an increasingly digital information environment, with its fast-paced and continuous change and its new workplace complexities, we need to prepare our librarians and staff to meet these challenges so that they can carry out their work as effectively and efficiently as possible.

Toward this end, the Libraries seek to embrace a philosophy of learning, training, and professional development that recognizes that learning is the shared responsibility of the Libraries as an organization and of each individual, that learning is an essential component of our work, that learning is ongoing and continuous, and that it embraces both job-related and broader issues and concerns.

The Rutgers University Libraries are committed to providing learning, training, and professional development activities and opportunities for all librarians and staff members in an environment that encourages and fosters learning in support of the Libraries' goals of providing the highest quality of library services to the Rutgers and the broader communities we serve.

b) **Mission and objectives**

The proposed plan is critical to the achievement of the Libraries' mission statement, which, in its most recent version (2000), refers to the Libraries as a "learning organization." It supports "**A Bridge to the Future: The Rutgers Digital Library Initiative,**" our long-range plan. In so doing, it seeks to insure that librarians and library staff have the skills and expertise that will be necessary to carry out these new and changing activities over the next four to five years and to work productively and innovatively in the new workplace environment.

We believe that the following objectives for the proposed learning/training/development plan and the organizational structure that will bring it into actuality support this mission statement:

- 1.) Identify and prioritize learning/training needs on an ongoing basis in accordance with the Libraries' strategic goals, the required competencies and areas of expertise expressed by diverse committees and other**

organizational groupings within the Libraries, and the needs of individual librarians and staff.

- 2.) Formulate, identify appropriate instructors for, implement, and evaluate a comprehensive series of continuous learning/training programs that address these needs.**
- 3.) Formulate, implement, and evaluate a series of instructional design strategies (syllabi, documentation, follow-up, etc.) that facilitate learning.**
- 4.) Facilitate technology-enhanced learning and the effective use of Web-based communication in support of learning.**
- 5.) Promote the idea of learning as a shared responsibility between individuals and the organization, of learning as ongoing and continuous, of learning as taking place in informal and formal settings, and of learning as integral to one's job – in accordance with the new philosophical statement.**
- 6.) Develop partnership relations within the university in support of learning, evaluating the effectiveness of the programs on an ongoing basis.**
- 7.) Develop a support structure that encompasses a coordinator of learning, training, and development services, an advisory committee, local learning/training liaisons, and support for facilitators and trainers.**
- 8.) Build an environment for learning that will foster innovation and progress.**

Clearly, in the development of the proposed plan, the steering committee has initiated much of this work. Its data gathering and recommendations should lay the groundwork for many of the needed programs as well as for some new kinds of instructional strategies that can be used to foster learning. Hopefully, the proposed support structure should also prove to be beneficial.

In view of the fluidity of the organization and the rapidity of technological and other change that surrounds us, it is envisioned, however, that program planning and its related activities will be continuing. There need to be ongoing needs assessments – they can be targeted at particular areas and need not be as comprehensive as the ones undertaken at this time - with input from diverse constituencies within the organization. There need to be ongoing program and instructional design and strategy development and evaluation, and an ongoing review of the proposed support structure and the way its various components interact with each other to insure its overall effectiveness.

2. Provide for learning and training that is continuous – getting to the heart of the matter.

We recommend that a comprehensive and cohesive series of workshops and programs that address the ongoing educational needs of librarians and library staff on a systemwide basis be the heart of our proposal for a new learning, training, and development program.

The Rutgers University Libraries are a large and fluid organization in terms of both who we are and what we do. The workforce changes, services are developed or revised, and systems are regularly acquired or upgraded. In addition, “**The Rutgers Digital Library Initiative**” requires new organizational and individual competencies. To move forward with agility and confidence, we need a program that:

- ◆ is linked to the Libraries’ priority needs and required competencies, and
- ◆ includes both initial, project training, and continuous learning opportunities.

Addressing these challenges will be the task of a new coordinator of learning, training, and development services and an advisory group. Together, with considerable input from others, the coordinator and committee will develop and manage the new program.

The initial content of the overall program will be based on the results of the individual and committee needs assessment surveys conducted by the steering committee on training and development. The coordinator and advisory committee will conduct future surveys so that content is kept fresh and relevant.

Formal and informal opportunities in diverse formats will be offered. In-house workshops, brown bag lunches, guest speakers, online tutorials, off-site sessions and courses, and other means appropriate to the topics and audience will all be considered.

Instructors will include librarians and library staff for such library specific topics as Unicorn and electronic reserves, and outside facilitators will be used for more general topics, as appropriate. Training responsibilities will become part of many position descriptions, and a database of individuals available for facilitating, training, or consultation on particular topics will be developed.

Planning will be done in the late spring and early summer for the following academic year, and a calendar will be developed and put on the Libraries’ staff resources website.

Curricula, syllabi, and learning/training aids and documentation should be created, preserved, and shared.

Assessment will be important for future program development and improvement. Each program description should include the objective of the offering and the skills that

participants will acquire. Evaluations should measure how well the program is meeting the Libraries' priority needs, as well as what learning occurred.

3. Provide appropriate structures for the effective coordination and support of the learning, training, and development plan.

A key component of the proposed plan is the development of an effective coordinating and support structure so that the plan can be put in place and carried out on an ongoing basis.

We recommend that the support structure include a coordinator, an advisory committee, local liaisons, and ongoing attention to the needs of facilitators and trainers.

Some specifics are as follows:

a) Coordinator of learning, training, and development services

We view this coordinator position as a new one that will have the responsibility for the implementation of the plan and for the further shaping of the component parts. In keeping with **our emphasis on learning**, the position will be titled "Coordinator of Learning, Training, and Development Services." **The coordinator will work with an advisory committee, with input from many others within the Libraries, and in concert with the university librarian.**

The coordinator will work collaboratively on ongoing needs assessments, on program and workshop development and implementation, on linking programs to the critical and high priority needs and to the new and changing competencies, and the like. He or she will facilitate the development of both traditional and new delivery mechanisms, and will work with the facilitators and trainers and the webmaster to make curriculum materials, learning aids, and other information available on the Libraries' website. He or she will develop partnerships with other units offering training within the university (including the Teaching Excellence Centers and RUCS, among others), will represent the Libraries at university-wide training discussions, and will facilitate the use of non-Rutgers programs and resources, as appropriate.

Importantly, the coordinator will work with the advisory committee and with others to create a new **"Institute for Library Leadership in the Digital Environment"**. **The institute will provide a new visibility for and focus on the leadership and related soft skills and on the changing technical skills that will continue to be needed as we move the Libraries ahead in achieving the objectives of the long-range plan.**

In essence, the coordinator **will be responsible for implementing the proposed plan** - promoting the philosophical statement and mission as the primary guiding frame for decision-making with respect to learning, making appropriate use of the data generated by the two initial surveys and gathering more data in particular areas as

appropriate, integrating evaluation and program improvement into the cyclical planning and implementation processes, considering new and traditional ways to deliver programs, and, most importantly, moving the Libraries ahead in the building of an environment for learning.

It is anticipated that the coordinator will **follow the research being conducted nationally on the learning process and on the use and effectiveness of the new techniques for interaction, collaboration, and communication** that are associated with experimental and new approaches to enhancing learning through the use of technology.

It is important that there be a close connection between the coordinator position and the professional staff in the Libraries' **Human Resources Department**. This will insure that the university's human resources policies and procedures are effectively integrated into the learning/training activities. Moreover, the very strong need expressed in the individual survey for learning in areas such as stress management and "working with difficult people" makes the need for this connection even more important.

The focus on **strengthening supervisory, interpersonal, and leadership skills**, also evidenced in the survey, further underscores the necessity for this kind of connection, as does the university's emphasis on its **pay for performance program**. Ongoing programs in **diversity** are also areas of direct concern to the Human Resources Department. Finally, the emphasis on learning as being part of the work that we do may require the review of a number of **job descriptions** and a re-examination of the existing **orientation program** for both library faculty and staff, activities that are, clearly, integral to work in the human resources area.

Future surveys may indicate other areas that need to be addressed operationally, as well as from a learning perspective.

It will also be important to provide **budgetary and staff support** for the coordinator.

b) Advisory committee on learning, training, and development

As noted above, an advisory committee within the Libraries that is somewhat similar to the representational makeup of the steering committee is an important component of the plan. Because of his major contributions to the work of the steering committee, we recommend that Professor Mark Winston continue as a consultant to the advisory committee. The committee will work, with the coordinator, to put in place the proposed plan and to insure that it meets the needs of the Libraries' long-range goals and the changing work being carried out in support of these goals. The committee will promote the philosophy, mission, and objectives articulated in the proposed plan. The committee will make suggestions on the various components of the plan.

c) Liaisons at local units

To insure that localized needs are met – whether in a particular functional area or a physical locale, such as a library or a campus, it will be important that there be a way of conveying learning/training needs to the coordinator and/or the advisory committee **so that there can be a prompt and effective response.** The use of **local liaisons should also insure that systemwide learning/training is effectively coordinated for maximum efficiency.** Administrative support for booking an appropriate space or insuring that the facilities, equipment, or software are available can also be handled through a local liaison mechanism.

d) Support and training for facilitators and trainers

To be effective, facilitators and trainers need to devote attention to their own development as persons of expertise. Just as we anticipate that learning will become part of everyone’s responsibilities, those persons who will become more actively involved in facilitating and instructing will need to think about this work not as something “extra” but as **an integral part of their job.** This will mean that some **job descriptions** may have to be revised to incorporate facilitating and training.

This may also mean that some facilitators and trainers may need **release time so that they can prepare for, carry out, and follow up with learning/training** activities. Facilitators and trainers may need to meet as a group or as multiple groups to insure that communication is effective and that there is consistency to the presentations. Moreover, in line with other recommendations in the plan, they will need to learn more about identifying competencies and instructional objectives, about putting materials on the Web, about providing appropriate (including technologically-based) follow-up, and the like.

Many facilitators and trainers will need to learn about effective technology-enhanced learning, including the use of **videoconferencing.**

Given this need for “training the trainers,” we suggest that the proposed **“Institute for Library Leadership in the Digital Environment”** address, through its planned programs, some of these needs. To begin the process, it will be helpful to **develop a database of trainers, facilitators, and consultants.**

4. Address the priority learning and training needs made evident by the individual and committee-based needs assessments (“Survey 2000”).

As noted in part two of this report, the “RUL Training and Professional Development Needs Assessment Survey” identified a number of high priority areas where skills development and strengthening is clearly warranted. Additionally, the “Questions on Training and Development for System-wide Committees” brought to the fore many valuable suggestions. Collectively, the two needs assessment instruments, “Survey 2000,” provide considerable data for program planning for a two- or three-year period.

Given the availability of these data, we recommend that attention be directed at addressing the high priority skills areas as soon as possible.

Toward this end, we suggest the following:

a) Combining the “Top-25 Learn More” and “Skills That Would Benefit you Most” rankings analyses as a way to determine priority programmatic areas.

From our perspective, the most important set of survey results is the “Learn More” – meaning, the individual respondent wants or needs to learn more about a particular topic or area. **High-ranking** skills and topics include **interpersonal and managerial skills**, such as working with difficult people, problem-solving, stress management, decision-making, managing change, ergonomics, leadership development, managing priorities, oral-written communication, time management, conflict resolution, critical thinking, effective meetings, understanding university priorities, and building learning into daily life. Interestingly, from this across-the-board survey of librarians and library staff, interpersonal and managerial skills emerged as being of considerably high priority, providing a rationale for the kinds of programs that can be offered through our proposed **“Institute for Library Leadership in the Digital Environment”**.

Technical skills that were highly ranked include working with browsers – Netscape, using training/learning websites, spreadsheet – Excel, PowerPoint, email, word processing – Word, sharing documents on the Libraries’ network, and basic computer use. High-ranking correlating skills and topics between the “Top 25 Learn More” variables and the question, “Skills that Would Benefit You Most,” yielded the following topics: stress management, time management, PowerPoint, effective oral/written communication, managing priorities, Spreadsheet – Excel, managing change, problem-solving, working with difficult people, conflict resolution, decision-making, and effective meetings.

It will be important to address these skill needs. The survey narrative and tabular data, as presented in the appendices and in the accompanying full report of the analysis, should provide further assistance in the selection of high priority topical areas.

The **“Learn More” low priority areas** warrant the understanding that not everyone is familiar with areas that they need to know more about, particularly with respect to the application of new technologies to the workplace environment.

The data, then, inform the program planning process. These data need to be used along with the systemwide committee suggestions and other future recommendations that may arise deemed to be critical to the undertaking of new projects in support of the long-range plan.

The presentation of **rankings data based on job classification**, i.e., library faculty, administrative/professional/supervisory employees, and library staff, provides further indication of the “Top-25 Learn More” priorities for each of these job categories.

Library faculty, for example, are especially interested in learning about PowerPoint, scholarly communication in the digital age, working with difficult people, problem solving, Web page creation, scanning techniques, and HTML coding.

Administrative/professional/supervisory employees are especially interested in learning about stress management, designing the flow of work, ergonomics, effective oral/written communications, leadership development, and self-assessment.

Library staff are especially interested in learning about basic computer use, using training/learning websites, emergency procedures, working with difficult people, and browsers – Netscape.

All in all, the challenge will be to develop programs that address the needs of these different groups in a variety of substantive and innovative ways, targeting skills learning programs appropriately.

b) Consideration of systemwide committee responses as key suggestions for further programmatic development.

As noted above, the questions directed at the systemwide committees were intended to elicit viewpoints from groups within the various functional areas within the Libraries as a way to determine needs from this perspective. These data were not ranked but were discussed by the steering committee as responses that need to be entered into the decision-making for the determination of appropriate learning/training programs.

The committees - largely composed of library faculty members - reflect the viewpoints, for the most part, of librarians and other professionals aware of the changing needs of the profession, the issues dealt with by librarians and staff on a daily basis, and the anticipation of change. The responses **tend to reflect concern with the impact of technology on information work and of providing services to faculty and students in a changing information environment.**

These responses deal with developing and employing digital resources and services, with information globalization and information management, and with software applications. They deal with organizational and personal skills, with job analysis, with diversity, and with health and safety. They also deal with issues of concern to people working with the collections, in the public services area, and in technical services.

To some extent, these responses reaffirm many of the faculty responses on the individual survey, but they provide more of a context for the needed skills

and topics.

Given the array of suggested topics, we recommend that the systemwide committees participate further in the program planning process. If the three councils reinstitute the idea of holding annual programs (as suggested in one of the committee responses), **some of these programs could be co-sponsored** with the coordinator for learning, training, and development services and the advisory committee as components of the new learning/training plan. Or, it may be that representatives of the systemwide committees will want to assist in the planning of programs to be offered under the auspices of the proposed **“Institute for Library Leadership in the Digital Environment”**. Whatever the means chosen, it will be critical that **the committees and councils continue to be active participants in the prioritization and program planning processes.** Members of these committees and/or councils will, presumably, also assist, if not play the major role, in the provision of instruction.

Additionally, **training sponsored by library committees** (and departments and other organizational units) **should be coordinated with the programmatic initiatives developed by the coordinator and the advisory committee.**

c) Programmatic addressing of needs in a variety of ways

As noted above, the challenge is to develop a series of instructional, learning, or training programs that addresses the needs identified above in a variety of ways. Programs can, of course, range from brown bag lunch discussions, to hands-on workshops, to full-day or multi-day programs. Some learning/instructional activities where the survey data indicate that there is a special need for learning about a particular skill/topic by librarians or library staff working in the Libraries for a relatively short period might be incorporated into a revised or **expanded orientation program.**

The proposed **“Institute for Library Leadership in the Digital Environment”** may also provide the framework for a number of additional programs, such as those directed at strengthening supervisory, leadership, and managerial skills. These programs can be tailored to operational needs, with participants working on actual projects and gaining skills that are directly applicable to their work.

The acquisition and upgrading of **technology skills** in the years ahead will be constant, and it will be critical to keep abreast of the ways that these skills are most effectively acquired. As noted later, the Libraries can avoid unnecessary duplication of effort by taking advantage of technology-based instructional/learning programs offered elsewhere in the university.

There may also be other kinds of programs in the health-related area that can be made available to Libraries’ personnel. The task of the coordinator and the advisory

committee will be to consider the various options that are open so that the best possible programs can be put into place at maximal efficiency.

5. Focus on the development of effective instructional design as a way to facilitate and enhance learning.

By instructional design we mean the series of coordinated component facets of a workshop or instructional/learning program that together insure that learning takes place and that participants are able to apply this learning to their workplace needs.

Toward this end, we recommend the following:

- ◆ **There is a clarity with respect to the objectives of the workshop or program**
- ◆ **There is a clarity with respect to the competencies that will be acquired by the participants in a particular workshop or program**
- ◆ **The content of a workshop or program should be related, as appropriate, to the participants' current and anticipated work and related needs**
- ◆ **The instructors/facilitators/trainers are knowledgeable and able to communicate effectively**
- ◆ **The learning that takes place during a session is active**
- ◆ **There are appropriate learning aids and documentation**
- ◆ **There are mechanisms provided to encourage and assist with follow-up discussions of question/answers**
- ◆ **There is a consistency, as appropriate, to the way subject matter is presented**
- ◆ **Supervisors or team leaders or others, as appropriate, are aware that a particular instructional session is being planned or is taking place so that learning can be effectively integrated into the workplace operation**
- ◆ **The facilities used are appropriate to the nature of the needs**
- ◆ **The evaluation method used is followed-up by appropriate improvements**

We are, of course, aware that all of these facets of a well-designed program cannot always be in place. What is important, however, is that thought is given to these and other instructional design facets and, above all, to the most appropriate ways that learning can occur.

We know that there are many programs currently in place within the Libraries that are effective and worthy of being identified in the category of **best practices**. We call attention to two training programs developed by the collections services department in New Brunswick that involve PowerPoint presentations. One is aimed at facilitating student employee learning of tasks associated with working the periodicals information desk, or the current periodicals and microforms information desk. The second focuses on presenting information on serials training for Workflows for a recent Unicorn release. The documentation for the serials training, available through a departmental website, has been used on a systemwide basis. It also received acclaim at a SIRSI users' group international conference.

These highlighted programs reflect the concern about learning and its design components that we view as progenitors of programs to come.

6. Make effective use of the staff resources Web pages for learning, training, and development.

We are aware that the Libraries' staff resources Web pages have been arranged to make learning/training resources available systemwide to all Rutgers University Libraries' librarians and library staff. The pages are arranged by function, and each functional area has a place for learning/training documentation.

There is also an overall learning, training, and development functional area. The Web pages for each functional area are the responsibility of a systemwide administrator, coordinator, or committee chair. It is anticipated that the learning, training, and development pages will be the responsibility of the proposed coordinator of learning, training, and development services. Each responsible person works with the webmaster to make materials available and to keep them current.

We recommend that the overall learning, training, and development web page include:

- ◆ **Calendar of learning/training opportunities, including programs developed or given under the auspices of the proposed "Institute for Library Leadership in the Digital Environment"**
- ◆ **Catalog of scheduled or recommended learning/training opportunities, including for each opportunity the description, instructor, objective, and skills that will be acquired**
- ◆ **Online registration form**
- ◆ **Database of individuals available for both training and consultation on particular topics**
- ◆ **Administrative documents, including application forms for advance funding support or reimbursement, and training policies, procedures, and contacts**

- ◆ **Information for facilitators and trainers, including basic training outline and structure, expense reimbursement form**
- ◆ **Research guide for online tutorials on such popular tools as Microsoft Office, html/xml, macros for MS-Word, etc.**
- ◆ **Links to the training documentation pages for each of the other functional areas**
- ◆ **Links to other training programs available to librarians and library staff, both inside the university and off-campus**
- ◆ **Links to other relevant learning, training, and development resources, such as information about diverse learning styles and the most appropriate ways to meet them, other libraries training Web pages, and the like.**
- ◆ **Online suggestion box**

We also recommend that each functional area Web page include the following:

- ◆ **Training documentation for the functional area, including learning/training aids and procedures, FAQs, follow-up questions and problem-reporting contacts, PowerPoint demos**
- ◆ **Interactive or multimedia modules for refreshing, follow-up, and point of need after training**
- ◆ **Links to functional area specific vendor sites**
- ◆ **Links to functional area specific online tutorials**
- ◆ **Links to the learning, training, and development Web page**

Some of the above suggestions were made known to the steering committee on training and development through the systemwide committee needs assessment. Others were developed by the steering committee.

7. Use technologies to facilitate and enhance learning

As higher education is being reshaped by the incorporation of Web-based and other technology-enhanced learning, our librarians have begun experimenting with new ways to teach information literacy skills in this changing information environment. Moreover, our librarians are being, and will undoubtedly continue to be, asked to provide instructional technology support for faculty and students using new digital and multimedia resources.

Given these changes and the new demands being placed on others in the Libraries, it makes sense that we in the Libraries make use of a variety of technologies to support our own learning and training initiatives in a way that adds strength to our programs. Moreover, the **multi-campus environment** that we work in speaks to the need for the effective incorporation of technologies that bridge geographical distance and time. We realize that some of these changes will take time and development of a new and shared expertise and that there is much to learn about what works best in a particular situation. Nevertheless, it will be important to focus attention on this area so that we can begin to gain the needed knowledge.

As noted earlier, one of the questions posed to the systemwide committees focused on this area, and there was much agreement that it should be pursued.

Toward this end, we recommend that we make a concerted effort to incorporate the use of new technologies into our learning and training programs in a way that facilitates and enhances learning.

Actions needed to reach this goal include the following:

a) Integration of videoconferencing technologies into programs for learning and training

The use of videoconferencing as one of the ways to enhance learning was given to the steering committee as part of its initial charge. The steering committee's discussions with Dr. Robert E. Nahory, a national expert in the use of videoconferencing technologies in support of learning, led the committee to understand that the benefits of effective videoconferencing are extensive. Using this technology effectively, however, means not only having the appropriate equipment but also, most importantly, **knowing how to conduct sessions that encourage active participation** at the remote site. Dr. Nahory has agreed to assist the coordinator and the advisory committee, perhaps through the proposed **"Institute for Library Leadership in the Digital Environment"**, in the development and conducting of learning sessions. This offer is well worth accepting.

b) Development of Web-based instructional programs and tutorials

The use of Web-based instructional programs increases daily in the higher education community. As noted above, the committees responded positively to the need to explore and develop new approaches to module and other facets of online training. This work can begin with the active creation of learning aids and/or PowerPoint or other presentations for dissemination through the new Web pages noted above.

What also needs to be done is the selection of a few topical areas where Web-based assistance or online tutorial development would be of benefit. Again, perhaps the proposed **"Institute for Library Leadership in the Digital Environment"** could provide a framework for this kind of module development. A multi-day session (for

example, for instructors) could provide a way to help some of our facilitators and trainers create, use, and evaluate Web-based programs. This work may well be one of the key challenges of the coordinator and the advisory committee, but we believe that it is worth undertaking.

Apart from incorporating these technologies into the learning/training program, many librarians and staff want to acquire and build strength in some of these areas for other aspects of their work. This need was made evident in the committee responses to the broad-based questions. In this regard, it will be critical to involve committees in the program planning processes, including the possible use of the **institute** as a means through which programs can be presented.

c) Use of new University initiatives - RUNet 2000 and TV broadcasting

In line with the recent undertaking of some of the university's key technical initiatives, it will be important to consider ways that this infrastructure can be directed at the support of learning activities for the Libraries. RUNet 2000 opens up the possibilities of fast electronic transmissions for learning and training programs, and we will need to create content. The new TV channels may also provide further opportunities for programmatic development. What is important is that thought be directed at these areas as possible vehicles for learning.

d) Need for adequate facilities

The Libraries need to make every effort to have a regular program of upgrading learning/training facilities to keep up with the latest technology for instruction and learning. **This includes updated classrooms, seminar rooms, and videoconferencing facilities.** Since library facilities are already heavily used for the user instructional services program, additional space must be provided as the Libraries' internal training/learning/development program grows. It may also be useful to have **some smaller spaces** with four or five computers in support of small group learning. The new library facilities being planned are aware of the kind of spaces that can be used for effective learning. Some of the current facilities may require this updating.

8. Create an "Institute for Library Leadership in the Digital Environment" to foster leadership at all levels within the Libraries during this period of continuous and rapid technological change.

As noted earlier, continuing education and learning within the Libraries is critical to the attainment of our long-range goals. One way of assisting the Libraries to address the needed competencies and skills development is to create an institute that will allow some flexibilities in providing programming that is not currently in place. The concept that we are putting forward is one that focuses on **leadership during a period of continuous technological change**, a concept that will allow us to consider the needs of leadership at all levels within the organization, and the technological learning that is critical to

effective leadership. A further rationale behind this idea is the very clear need for leadership, interpersonal, communication, supervisory, and managerial skills that were evidenced in “Survey 2000.”

In view of the nature of these needs, we recommend that an “Institute for Library Leadership in the Digital Environment” be established. This recommendation is presented as a bold way of giving notice that the Libraries are serious with respect to providing an innovative and substantive learning program.

The institute may be viewed as a component within the Libraries’ overall plan for learning, instruction, and training. It is meant as **a supplement to the ongoing programs**, and the coordinator and advisory committee can decide the most appropriate programs that the institute will sponsor.

At this point, we believe that it should be possible initially to put on two major multi-day programs a year – perhaps during the winter and summer

a) The first program – targeting supervisors

Our initial suggestion is that the first program – possibly a three-day institute – be targeted at supervisors throughout the Libraries. This will be **a way to help our supervisors understand the critical importance of learning**. As supervisors, they will be instrumental in the success of the overall plan, and so it will be important to insure that they have a strong sense of what the proposed philosophy and mission mean. Additionally, being together for a multi-day program will undoubtedly facilitate bonding and collaboration and the development of contacts for ongoing learning.

The detailed planning of this kind of program – the number of participants, the selection criteria, the particular interweaving of programs, the instructors, the follow-up, and the like, will be a task for the coordinator and the advisory committee and any others whom they might wish to consult. Our suggestion is that the program address some of the “Top 25 Learn More” and “Skills that Would Benefit You Most,” that the program be practical in nature, and the participants take back some concrete technical skills that they can apply to their work situations. This kind of **immersion** experience should lead to many positive results. Another suggestion that we have is that both Mark Winston and Karen Novick of SCILS, because of their interest and expertise, are included in the program planning.

b) The second program – digital technologies

The systemwide committee surveys and the individual needs assessment yielded many useful suggestions, including many that are digitally-based and that can be further developed into a full-fledged, perhaps, multi-day program. The particular programmatic areas to be selected will depend on the advisory committee in consultation with the systemwide committees. **The focus** could be on the effective

use of **videoconferencing**, on **developing online modules**, or on any other topics of interest to librarians or others. As noted earlier, the joint sponsorship and planning by several committees or councils with the coordinator and the advisory committee would reflect the kind of ownership of the learning/training programs that we consider critical.

c) Future programs

The two needs assessments indicated many other high priority areas for programming. Drawing from these data – or from new data gathering – future **programs could be aimed at particular groups, such as trainers and facilitators or librarians or staff working in a particular functional area**. Or, they could be focused on particular topics of need, whether in the leadership/interpersonal skills area, in the technical area, or in an area that integrates both sets of skills.

d) Resources, evaluation, and potentiality

There will, of course, be resources needed to support one or two annual institutes. The coordinator and the advisory committee will need to develop a budgetary request in concert with the university librarian. As with every other component of the plan, evaluation will be critical and will determine the extent to which the **institute** meets its goals. Should there be a series of successive programs that are, in fact, successful, there is always the potentiality for reaching out to other libraries within the state where there may be similar needs. The critical question to be raised and answered is – will this kind of institute help the Libraries move ahead in addressing the learning/training needs of the librarians and library staff? Our thoughts are that it might but that it needs to be appropriately shaped, tried, and, of course, evaluated.

9. Develop learning and training partnerships/participate in external programs

The steering committee's conversations with representatives from the SCILS professional development studies program, the New Brunswick Teaching Excellence Center staff development program, and the RUCS user services group made it aware of some of the programs available elsewhere in the university that can be of value to the Libraries.

We recommend that the Libraries work with the New Brunswick Teaching Excellence Center (and the other centers when they are ready) **and RUCS to address some of our technologically-based learning needs.**

Toward this end, we suggest undertaking discussions with the **teaching excellence center** for participation in their staff development program. This program provides workshops in basic computer training, staff software applications training (word processing, spreadsheet, database, PowerPoint, desktop publishing), and Internet development for staff (email and the Web, basic Web page design for staff).

RUCS offers computer training in areas ranging from Netscape Messenger email, to SAS and SPSS, Unix, and Web page creation using Netscape Composer, among others. We further recommend exploring the possibilities of sending some librarians and staff to participate in these programs.

We know that the University offers **other professional development programs**, including those offered in the areas of **communications/leadership development, supervisory/managerial skills, human resources policies and procedures, and in ergonomics and health**. Again, we suggest that the coordinator and the advisory committee explore the nature of some of these programs and make further recommendations.

Apart from developing partnerships within the university, it will be important for librarians and staff **to attend external educational and training programs**. **We recommend that the travel funds for both librarians and library staff be increased**. Librarians need to participate in national and other conferences to be knowledgeable about cutting edge developments in librarianship, about new technological applications, and about emerging educational and learning trends. Many staff members also need to participate in similar programs. Hand in hand with this recommendation, we will want to continue to bring in guest speakers for particular programs and build this need into the coordinator's annual budgetary request.

10. Build an environment for learning

We see the previous set of recommendations as interlocking component parts, steps that will help us to build the kind of environment for learning that will be important for us as we move through these years of fast-paced change. **We believe that the development of a learning environment within our work culture will foster innovation and the kind of progress that we want**. A learning environment promotes openness and the sharing of knowledge. In many ways, the programs that we propose are conduits through which a learning environment is promoted and maintained.

The responsibility of building a learning environment is a shared one. Learning new skills and developing new areas of expertise means one must also understand how the skills can or will be used in the work environment, how one's colleagues can also benefit from the new knowledge, and how the work itself will benefit or change. It is the understanding of these shared responsibilities and the need for everyone to participate in the educational processes that we think are part of what makes an environment for learning, part of what calls for **leadership at all levels**. The conceptual move that we have made - **from training to learning** – parallels and reaffirms this thinking.

A significant investment in learning has, clearly, been made, and will not only continue but also help us attain our organizational aspirations.