

**STATE LIBRARY OF NORTH CAROLINA
2007 CONTINUING EDUCATION STUDY**

FINAL REPORT

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PART I: INTRODUCTION

In October, 2006, the State Library of North Carolina (SLNC) issued a Request for Information to select a consultant to conduct a comprehensive statewide training needs assessment of library staff in the state's public libraries, community colleges, and four-year colleges and universities. In March, 2007, Sandra Nelson was selected to complete the needs assessment.

The purpose of the needs assessment was to identify the topics, formats, time frames, and delivery methods that would provide the most effective library training for the staff from the 189 libraries served by SLNC in the future. However, before looking toward the future, it is important to acknowledge that the SLNC statewide continuing education program has been very successful for many years. The Master Trainer program should serve as a model for other state libraries. The training programs that are sponsored by the State Library are very much appreciated by the members of North Carolina's library community. This comment from one of the focus group participants was repeated in many variations by participants in other focus groups and by many of the survey respondents: *The State Library has done a great job of upgrading CE in the past four years. CE is getting better and better.* The recommendations in this report are intended to build on the existing strengths of the State Library of North Carolina's CE program.

SOURCES OF DATA

This needs assessment is based on four separate data sources:

- Existing statistical data about training programs sponsored by the State Library of North Carolina (SLNC) between July, 2004 and July, 2007 and data about the Master Trainer Program from the calendar year 2003. (Data available in Appendix A.)
- Seven focus groups held throughout the state during the week of June 4-8, 2007. (Data available in Appendix B.)
- An online survey completed by 504 public and academic library staff members between June 19 and July 11, 2007. (Data available in Appendix C.)
- Key informant interviews with nine librarians from academic libraries, public libraries, NC Live, and SLNC conducted between July 18 and August 3, 2007. (Data available in Appendix C.)

TABLE 1: PARTICIPANTS

	Public	Academic	Other	Total
Focus Groups	50 (67%)	22 (20%)	3 (4%)	75 (13%)
Online Survey	391 (78%)	84 (17%)	29 (6%)	504 (86%)
Interviews	1 (11%)	3 (33%)	5 (56%)	9 (2%)
Total	442 (75%)	109 (19%)	37 (6.3%)	588

Existing Data (Appendix A)

Workshop data from six training cycles was evaluated: Fall, 2004; Spring, 2005; Fall, 2005; Spring, 2006; Fall, 2006; and Spring, 2007. The data included the location, format, attendance, overall evaluation, and topic for each of the 186 training programs presented during those cycles. The data from the Master Trainer Program for January – December 2003 (the most recent data available) were also evaluated.

Focus Groups (Appendix B)

A total of 75 people attended seven focus groups: 50 (66.7%) public librarians and library paraprofessionals, 22 (20.3%) academic librarians and library paraprofessionals, two from NC LIVE staff, and one from a state agency. Three of the focus groups were open to anyone who wished to attend, two of the focus groups were for paraprofessionals, and two of the focus groups were for directors. The relative low participation by academic librarians and library paraprofessionals was mirrored in the online survey described next.

Online survey (Appendix C)

A total of 504 people completed the online survey: 391 (77.6%) public librarians and library paraprofessionals, 84 (16.7%) academic librarians and library paraprofessionals, and 29 (5.8%) librarians and library paraprofessionals from other types of libraries. This is a much higher than expected response. However, it is apparent from a comparison of the number of respondents from public libraries and the number of respondents from academic libraries that the vast majority of respondents were from public libraries. This extent of the difference is apparent in Table 2.

TABLE 2: PUBLIC AND ACADEMIC RESPONDENTS

	Number of Libraries	Total FTE Staff*	Number of Respondents	Average Per Library
Public	75	2,973	391	5.2
Academic	127	2,455**	84	1.5

* 2004 data

**Excludes student workers

There are several possible reasons for this significant variance. The most probable is that SLNC provides very few training programs that are specifically targeted for academic librarians and library paraprofessionals. Several academic librarians and library paraprofessionals who participated in the key informant interviews said that they thought the SLNC training for public library staff was not particularly relevant for academic library staff. The NC LIVE training was the exception to this rule. That training is not library-type specific and both academic and public libraries use NC LIVE and participate in NC LIVE training. Survey respondents were asked to indicate their job classification. Fifty-nine were directors (11.7%), 152 (30.2%) were managers, and 252 (50%) were non-supervisory staff members. Forty-one (8.1%) were other classifications or did not answer the question. Thirty-six of the directors that responded were from public libraries, 21 were from academic libraries, and 2 were from other types of libraries. That means that 51% of the directors of the 75 public library systems in the

state responded to the survey and 17% of the directors of the 127 academic libraries responded.

Key Informant Interviews (Appendix D)

Three (33.3%) academic librarians, 1 (11.1%) public librarian, 2 (22.2%) NC LIVE staff members, and 3 (33.3%) SLNC staff members participated in the key informant interviews. One-third of the librarians interviewed were from academic libraries to provide some balance to the overwhelming percent of public librarians and library paraprofessionals who participated in the focus groups and responded to the online survey. The NC LIVE and SLNC staff were interviewed because they work with library employees from across the state and have a more global view of training issues.

The interview questions were designed to explore issues raised in the survey and the focus groups in more depth. Interviewees received the questions in advance to give them time to think carefully about the issues raised and to formulate their answers.

LIBRARIES TODAY – THE TRAINING ENVIRONMENT

The library staff who participated in the focus groups and telephone interviews and who completed the online survey were asked to think about the skills they would need in the future. Inevitably, their perceptions were affected by the two major changes that are affecting libraries today: the increasing number of people who have access to the vast resources available through the Internet and the changing demographic profiles of the people who are using public and academic libraries.

Information Technology

For the purposes of this study continuing education programs were defined as standalone events designed to provide information and tools to help current library employees develop or enhance their library-related knowledge and skills. The challenge was to identify the *library-related knowledge and skills* that will be required in the future.

It was clear from responses in the survey, the focus groups, and the telephone interviews that the rapidly changing information technology environment is affecting every aspect of librarianship in both public and academic libraries. The effect could even be seen in the statistical information about past SLNC training programs. In the fall of 2004, 8% of the training programs sponsored by SLNC were online courses; by the fall of 2006, almost half (48%) of SLNC's training programs were online courses.

All of the people who participated in the survey, the focus groups, and the telephone interviews agreed that more and more online resources are going to be available to the public from a variety of sources. There was less agreement on what this will mean for library services. Opinions ranged from "we need to reframe the organization" to "we have to establish ourselves as the place to go for information guidance" to "traditional services will be maintained."

Most of the academic librarians and library paraprofessionals who participated in the focus groups and telephone interviews were already involved in redefining their services. One said: "We are de-emphasizing the reference desk. We are going out to classrooms and we are putting much more emphasis on our web page." Fewer of the public librarians and library paraprofessionals talked in terms of transformation. They were more inclined to talk about adding an array of online programs (book clubs, homework help, computer classes) to their existing services. This ambivalence about the future of information services is reflected in a number of findings discussed below.

Customer Service

One of the dominant themes in the data from the survey, the focus groups, and the telephone interviews was the need for improved customer service skills in all levels of staff in both public and academic libraries. The broad topic "customer service" included working with non-traditional users, with people who speak English as a second or third language, with people who don't understand technology, with people who know more about technology than the staff, and with a wide range of people grouped under the general heading "difficult user."

One of the issues that was often discussed was the need for staff to be able to determine what any of the users listed above actually want when they ask staff for help – and then to be able to provide what is needed. This emphasis on developing the skills needed to communicate effectively with both traditional and non-traditional library users is reflected in a number of findings discussed below.

PART II: RECOMMENDATIONS AND KEY FINDINGS

A. ADDRESS BARRIERS TO TRAINING

- A1. Create a Staff Development Advocacy Task Force composed of library directors and staff members from both academic and public libraries. The task force will be responsible for identifying strategies to help library managers understand the importance of ongoing staff development and encouraging library managers to:
- Provide opportunities for all staff to attend training programs regularly
 - Develop incentive programs and other ways to encourage staff to attend training programs
 - Provide a mechanism for staff to practice the new skills they develop while attending training programs
 - Provide an opportunity for staff to discuss the new concepts and ideas they learned while attending training programs

Rationale: A much higher than expected number of library staff members responded to the survey and over half (54%) of them had not attended a CE program in the past year. That suggests that there is a great deal of interest in continuing education among staff members in North Carolina public and academic libraries, but may also suggest that many staff members find it difficult or impossible to attend training programs. The question is why?

Participants in all seven of the focus groups were asked "What are the biggest barriers that keep staff from getting the CE they need?" All seven groups mentioned staff coverage, travel time, and travel money as being significant barriers (these were also identified as factors that affect attendance in the survey). The other theme that came up in all seven focus groups can best be summarized as "People don't want to go to training." There were a variety of sub-themes: there is a lack of managerial support for staff attending training, staff don't want to drive to training (particularly in cities), there are no rewards or incentives for attending training, and staff don't see any benefits to training.

The people who participated in the telephone interviews were asked what they thought could be done to address this problem. Everyone agreed that the comments from the focus groups accurately reflected the current situation and the suggestions for resolving these problems were remarkably consistent. Those answers are best summarized by this person's response: *The state can't fix this. The directors will have to. Training needs to be a value in the library.*

- A2. Continue to offer face-to-face programs in all three regions of the state and to schedule programs on days and times convenient for participants.

Rationale: Questions 9 and 10 in the online survey asked respondents to indicate how far they were willing to drive for a program that was of moderate interest to them and how far they were willing to drive for a program that was extremely interesting to them. Their responses can be seen in Table 3.

TABLE 3: DISTANCE

	Moderately Interested			Extremely Interested		
	East	Central	West	East	Central	West
30 minutes	28.8%	9.7%	20.8%	17.5%	1.9%	6.7%
1 hour	34.0%	35.1%	28.3%	12.3%	3.9%	7.5%
1.5 hours	15.1%	17.5%	19.2%	10.8%	5.2%	6.7%
2 hours	17.5%	23.4%	17.5%	24.1%	24.7%	23.3%
2.5 hours	2.4%	5.2%	5.8%	10.4%	11.0%	12.5%
3 hours	1.4%	7.1%	5.0%	19.3%	25.3%	15.8%
Over 3 hours	.5%	1.3%	2.5%	5.2%	27.9%	26.7%
NA	.5%	.6%	1.7%	.5%	0	.8%
Average*	1.2 hours	1.5 hours	1.4 hours	1.9 hours	2.5 hours	2.6 hours

*To determine the average, "Over 3 hours" was considered to be four hours.

Based on this data, it appears that library staff in the eastern part of North Carolina are less willing to spend time traveling to training programs than staff in the central and western parts of the state. However, a review of the existing data doesn't seem to support this.

During the six training cycles included in this review four training programs were cancelled in the east and four training programs were cancelled in the west, while only one was cancelled in the central part of the state. In view of the data in Table 3, one might assume that attendance at programs in the eastern part of the state would have a lower attendance than programs in the central and western parts of the state. In fact, the average attendance at programs held in the western part of the state was considerably lower than in the other two regions. As can be seen in Table 4, the average attendance at programs in the east was the same as the average attendance at programs in the central part of the state.

TABLE 4: NUMBER OF TRAINING PROGRAMS AND ATTENDANCE BY REGION OF THE STATE

	Programs in East			Programs in Central			Programs in West			Online Programs		
	Att.	No.	Ave. Att.	Att.	No.	Ave. Att.	Att.	No.	Ave. Att.	Att.	No.	Ave. Att.
Fall, 2004	52	4	13	209	11	19	77	4	19	12	2	6
Spring, 2005	134	11	12	116	8	15	99	8	12	53	5	11
Fall, 2005	78	6	13	74	7	11	57	4	14	57	5	11
Spring, 2006	155	6	26	179	9	20	46	6	8	177	13	14
Fall, 2006	100	6	17	140	9	16	77	7	11	263	20	13
Spring, 2007	75	5	15	112	7	16	80	6	13	112	8	14
Totals	594	38	16	830	51	16	436	35	12	674	53	13

What is significant about the data in Table 3 is that no matter what part of the state in which library staff live, they are willing to drive longer distances to attend

programs that are extremely interesting to them. While this is not a surprise, it is a reminder that people are unlikely to drive more than an hour to attend a typical library training program. One of the benefits of expanding the Master Trainer Program (see Recommendation B1) is that there will be trainers available in all parts the state and programs can be presented in as many locations and as many times as needed.

Other Issues to Consider When Scheduling: In question 11, survey respondents were asked if the length of a CE program or the day upon which it was scheduled affected their decision to attend the program. Approximately 75% of the respondents said that length or scheduling affected their decision. The differences between public and academic staff responses were minor. In question 11a, those who had said that length and schedule affected their attendance were asked to indicate their top two preferences for schedule and length. Again, the differences were minor. All respondents preferred whole day programs. Overall, there was a slight preference for programs beginning at 10:00 and ending at 4:00 and academic respondents preferred this option by almost 17% over the whole day programs beginning at 9:00 and ending at 3:00. By far the least preferred option by all respondents was a half-day program beginning at 1:00.

TABLE 5: PROGRAM LENGTH

	All	Public	Academic
Whole day – 10:00-4:00	48.1%	47.4%	53.8%
Whole day – 9:00-3:00	44.3%	45.7%	36.9%
Half-day – 9:30-12:00	43.0%	45.7%	33.8%
Whole day with one program in the morning and another in the afternoon	32.7%	31.3%	33.8%
Half-day – 1:00-3:30	17.6%	16.5%	21.5%

In question 11b, survey respondents were asked which day of the week was most convenient for them to attend training. Monday was the least convenient day by far. There were only minor differences among Tuesday, Wednesday, and Thursday, and Friday was considered to be slightly less convenient than Tuesday through Thursday.

B. EXPAND MASTER TRAINER PROGRAM AND REFINE TRAINING TOPICS

B1. Expand the Master Trainer Program.

- Shift the focus from providing technology training for library staff and users to providing a variety of training programs (customer services, reference, and youth services training) for library staff.
- Encourage Master Trainers to work together to develop training programs that can be presented collaboratively by the teams that developed the programs or individually by any member of the team.
- Establish guidelines that define:
 - The maximum number of times a library may use a Master Trainer from another library each fiscal year (recommendation: two)

- The maximum number of times each Master Trainer can be asked to provide a training program for another library each fiscal year (recommendation: two)
- Develop an easily-accessible Web-page on SLNC site that includes:
 - A list of the Master Trainers with a brief bio and a description of the programs that each can present
 - The guidelines for requesting a program by a Master Trainer
 - A form to be used to request that a specific Master Trainer present a program
- Publicize the fact that Master Trainers are available to provide training to staff in libraries other than their own.
- Develop a process to manage and track the use of Masters Trainers by NC libraries. Two options are listed below, the first is preferable, but either could work:
 - Manage the program centrally: requests for Master Trainers would be made through the SLNC; SLNC staff would work with the director of the Master Trainers' libraries to arrange for release time; and collect and collate statistics
 - Let interested libraries contact Master Trainers directly to request training and ask Master Trainers to arrange for release time to present the training and collect and submit statistics to the SLNC.

Rationale: The SLNC Master Trainer program has been very successful for the past ten years. The original Master Trainer program was developed as a creative way to address the enormous challenge of training library staff and users to effectively find, evaluate, and use information on the Internet.

In 2004, SLNC staff asked the Master Trainers to report the number of sessions they had presented during 2003 for staff and the public and the attendance at each session. Seventeen of 58 Master Trainers (30%) responded and their responses are summarized in Table 6. As can be seen in the table, the Master Trainers appear to have spent more time training the public than training library staff.

TABLE 6: MASTER TRAINER REPORT (1/03-12/03)

	Number of Sessions	% of Total	Average Attendance	% of Total
Staff Training	90	20%	788	13%
Public Training	358	80%	5,380	87%
Total	448	100%	6,168	100%

Members of both the public and of library staffs have had ten years to learn to use the Internet. According to a May, 2007 report by the Pew Internet & American Life Project, 81% of Americans have Internet access in their homes and almost 50% of them have broadband access at home.¹ Obviously, there are still

¹ John Horrigan, *A Typology of Information and Communication Technology Users*, 5/6/2007. http://www.pewinternet.org/PPF/r/213/report_display.asp

members of the public who need technology training, but the number is dwindling and will continue to decrease.

Almost all library staff members have the basic skills needed to use the Internet. While there may be a need for advanced Internet training for some staff members there are many other staff training needs that must be met as well (see recommendations B2 and B3).

The current Master Trainers have the instructional design skills needed to develop and deliver training in a variety of topics. Future Master Trainer courses could focus on developing training programs in specific areas: youth services, customer service, reference, marketing, etc.

B2. Provide a coordinated series of training programs for library managers that focus on developing and expanding managerial competencies:

- The management training should be targeted for both academic and public library managers and should focus on the issues they have in common (planning, budgeting, leading, managing change, etc.).
- SLNC staff should work with the members of the NCPLDA and the directors of the state's academic libraries to identify the management topics to be included and the desired learning outcomes.
- The management training programs should be designed to be delivered over multiple years and the individual training programs should be inter-related and designed to build on previous learning.
- The management training programs should be delivered by a combination of academic and public library trainers and at least one professional trainer should be hired to present a program in the series each year.

Rationale: Library school teaches librarians the fundamentals of librarianship. On-the-job training hones their library skills and helps to keep them up-to-date professionally. Most librarians had little management education or training when they become managers. In fact, most librarians are promoted to managerial positions because of their library skills - and those skills don't always translate into management strengths. Now, more than ever, it is critical that library managers have the tools and expertise they need to effectively manage limited resources, rapidly changing information resources, and an increasingly demanding public.

Survey respondents were asked to list five training programs they would like to attend. Management and supervision topics were ranked third on the overall list (fourth for public library staff, third for academic library staff, and second for respondents from other types of libraries). This is a topic that appeals to all of the SLNC constituents and that would attract participants from both public and academic libraries.

B3. Focus future training on the topics listed below. Place the highest priority on training programs designed to improve communication and customer service skills and on programs designed to help staff understand and use new technologies.

- Technology (trends, new technologies, hardware, and general technology issues)
- Reference services and materials, NC LIVE, search skills
- Management and supervision
- Youth services
- Customer service and communication skills
- Marketing, public relations, and merchandizing
- Collection development
- Technical services, cataloging, and processing
- Software
- Library trends (technology trends included with technology)

Rationale: Focus group participants were first asked what they thought library services would look like in five years and were then asked to describe the staff knowledge, skills, and abilities that would be required to provide those services. Participants in every focus group emphasized the need for improved customer service skills and stronger communication skills. They all stressed that staff needed to be able to do a competent reference interview and then get the customer what s/he wants, whether that is a best-seller, a DVD, a computer lesson, or the answer to a reference question. Focus group participants also said that staff will need to be trained on the newest technologies, whatever those might be.

Survey respondents were asked to list the five training programs they would attend if they could. There were 1,108 responses to this question. Thirty-six topics were mentioned at least three times. However, only ten topics were mentioned by at least 8% of the respondents. These top ten topics represent 65% of the responses. As can be seen in Table 7, the survey respondents ranked technology training as their highest priority. Customer service skills ranked fifth. However, the survey respondents were thinking in terms of their current interests and needs. The focus group participants, most of whom identified customer service as their first or second training priority, were identifying the training they thought would be needed in five years.

TABLE 7: TRAINING TOPICS

	PL	AL	Other	All	%
Technology (Trends, New Technologies, Hardware, and General Technology Issues)	88	31	12	130	26.0%
Reference Services and Materials, NC LIVE, Search Skills	78	19	5	102	20.2%
Management and Supervision	63	14	6	83	16.5%
Youth Services	76	1	2	79	15.7%
Customer Service and Communication Skills	55	12	3	70	13.9%
Marketing, Public Relations, and	52	6	2	60	11.9%

Merchandizing					
Collection Development	39	9	2	50	9.9%
Technical Services, Cataloging, and Processing	27	17	5	49	9.7%
Software	30	16	2	48	9.5%
Library Trends (Technology trends included with Technology)	42	0	2	44	8.7%

It is particularly important to select topics that appeal to potential attendees, because the topic is by far the most important factor in one's decision to attend a training program. Question 5 of the survey asked respondents to rank the factors that affected their decision to attend a training program on a scale of 1 (very important) to 5 (very unimportant). The topic was ranked as most important by both public (.5 over the next factor) and academic librarians and library paraprofessionals (.3 over the next factor). The averages for each factor are listed in Table 8 below in order of importance.

TABLE 8: FACTORS THAT AFFECT ATTENDANCE

Factor	All	Public	Academic
The topic	1.4	1.4	1.4
The location of the program	1.9	1.9	1.7
Staff coverage and scheduling in my library	2.1	2.0	2.3
My board/boss wants me to attend	2.1	2.0	2.4
The cost of the program	2.0	2.1	1.7
The intended audience for the program	2.2	2.2	2.2
The length of the program	2.6	2.6	2.7
My board/boss will not let me attend	2.7	2.6	3.2
The presenter	3.0	3.0	3.1

The fact that "the presenter" was at the bottom of both lists may be explained by this comment from one of the people who took the survey:

The presenter would be a more important factor for me if I knew the person (i.e., had been in a class by them before) but most of the time I don't/haven't. It would make a difference if I knew they were a Master Trainer.

B4. Develop and market training programs specifically for paraprofessional staff members.

Rationale: The participants in the two paraprofessional focus groups were articulate and committed to providing excellent library services. They said that it was difficult for them to get release time to attend training and that most training programs seemed to be for "librarians and library paraprofessionals." They asked for training programs designed specifically to meet their needs: communication and customer service skills, technology skills, reference and programming skills, and information on library trends. As one focus group participant said: *We will be combining the reference desk and the circulation desk and we will need cross-training.*

B5. Work with key stakeholders to develop a comprehensive statewide plan to provide training to support NC LIVE. As they develop the plan, the stakeholders should:

- Identify the level(s) of NC LIVE training to be presented (e.g. basic, intermediate, advanced) and the audiences for each level of training.
- Identify approximately what percentage of the SLNC face-to-face training programs should focus on NC LIVE databases each year.
- Plan to provide more NC LIVE training through online courses.
 - Identify online training programs that are currently available to train library staff to use one or more of the NC LIVE databases.
 - Evaluate the effectiveness of each online program
 - Determine the cost for each program
 - Consider purchasing statewide licenses for online training programs that are effective
 - Identify NC LIVE training needs that cannot be met through available online training programs and consider entering into a contract with an online training design firm to develop the needed programs.
 - Identify who will be responsible for selecting, paying for, and monitoring the use of the online training programs selected to provide NC LIVE training.
- Identify the results expected from both online and face-to-face NC LIVE training programs. Develop a methodology to determine if the intended results are achieved each year

Rationale: Since the fall of 2004, 38% of the CE programs offered by SLNC have been in support of NC LIVE (see Table 9).

TABLE 9: NC LIVE TOPICS AS A PROPORTION OF SLNC TRAINING TOPICS

Training Cycle	NC LIVE Topics		Other Topics		Total #
	#	%	#	%	
Fall 2004	10	40.0%	15	60.0%	25
Spring 2005	12	36.4%	21	63.6%	33
Fall 2005	6	27.3%	16	72.7%	22
Spring 2006	18	50.0%	18	50.0%	36
Fall 2006	16	37.2%	27	62.8%	43
Spring 2007	9	33.3%	18	66.7%	27
Total	71	38.2%	115	61.8%	186

At first glance, this may seem reasonable. When asked to select training topics, 20% of the online survey respondents requested reference subjects, which ranked second in overall requests (see B3 above). However, as can be seen in Table 10, only 20% of those respondents specifically asked for NC LIVE training. Twenty-five percent of the requests were for more training on using the Internet and Internet resources. The other 55% of the requests were a variety of other reference-related topics. It is possible that some survey respondents were thinking about NC LIVE when they identified Internet searching and resources as a priority, but even if there was some confusion it seems clear that less than 40% of the reference requests were related to NC LIVE. That means that NC LIVE training was requested by between 5% and 8% of the survey respondents, which ranks lower than any of the top ten topics requested.

TABLE 10: REFERENCE SERVICES AND MATERIALS, NC LIVE, SEARCH SKILLS DETAILS

Subjects	Public	Acad.	Other	All
Internet searching and resources	10	4	1	25
NC LIVE: General (21); Specific databases (9)	25	5	0	20
Reference: General	12	1	0	13
Reference resources, new print and non-print reference materials available	4	6	0	10
Reference services: Specific (advanced, business, ready reference, with books)	7	0	0	7
Virtual Reference Desk	2	3	0	5
Reference interview	4	0	0	4
Trends/best practices	4	0	0	4
OCLC Connexion Client search techniques, OCLC Worldcat Basics	2	0	0	2
Roving reference	2	0	0	2
	78	19	5	102

In the past six training cycles 80% of the NC LIVE training programs were offered face-to-face (see Table 11), which is the most resource-intensive method of delivering CE. Face-to-face training programs are one-time events and typically involve travel time as well as training time. Online training, on the other hand, is available whenever people want it and can be accessed from people's workplaces or homes. The initial costs of developing online training programs may be higher than the cost of presenting a face-to-face program, but the long-term costs are normally considerably less, because the online programs can be offered multiple times. Furthermore, it is appropriate to use online training courses to train people to use online resources.

TABLE 11: NC LIVE TRAINING – FACE-TO-FACE AND ONLINE

Training Cycle	Face-to-Face		Online		Total #
	#	%	#	%	
Fall 2004	10	100%	0		10
Spring 2005	12	100%	0		12
Fall 2005	6	100%	0		6
Spring 2006	12	66.7%	6	33.3%	18
Fall 2006	8	50.0%	8	50.0%	16
Spring 2007	9	100%	0		9
Total	57	80.3%	14	19.7%	71

As noted above, nearly 40% of the training programs that SLNC has offered since the Fall of 2004 were designed to train library staff to use NC LIVE databases. There has been no systematic evaluation of the effect of those programs. The most obvious measure of success should be an increase in the use of databases in libraries after staff attend NC LIVE training programs. The stakeholder committee planning for NC LIVE training may identify additional outcomes, as well.

C. MEET PARTICIPANT EXPECTATIONS

C1. Develop a *Trainer's Fact Sheet* that includes information about what NC library staff members expect when they attend a training program. Distribute the *Trainer's Fact Sheet* to everyone who delivers training for North Carolina library staff members (the Master Trainers, trainers from SOLINET, local libraries, and regional libraries). Make it clear in the *Trainer's Fact Sheet* that training for NC library staff must include the following elements:

- Practical information attendees can use when they return to their libraries.
- Information and materials that can be easily adapted to meet the unique conditions in each library.
- Information on how to improve library skills.
- Materials that can be shared with others in the library.

Rationale: Question 8 in the online survey asked respondents to indicate how important it was to them that training programs meet a series of needs and expectations. Respondents from both public and academic libraries indicated that their highest priorities were to attend training programs that provided practical information, included information and materials that could be easily adapted, focused on helping participants develop new or improved library skills, and were supported by materials that could be shared with others in their libraries (see Table 12). These four issues were more important to both public and academic librarians and library paraprofessionals than receiving information on new technologies. This is significant because receiving information on new technologies was the topic selected most often in the participant "wish lists" (see recommendation B3).

TABLE 12: NEEDS AND EXPECTATIONS

	All	Public	Academic
Practical information I can use when I return to my library	1.5	1.5	1.4
New or improved library skills	1.7	1.7	1.7
Materials I can share with others in my library	1.7	1.7	1.7
Information and materials that can be easily adapted to meet the unique conditions in my library	1.7	1.6	1.6
Information about new technologies; both hardware and software	1.9	2.0	1.6
Information about trends in libraries	1.9	2.0	1.7
Information about specific programs and services being offered in other libraries	1.9	1.9	2.0
The opportunity to talk to other library staff in North Carolina	2.1	2.2	1.8
New or improved management skills	2.2	2.2	2.0
Topical information about new or changed national or state laws, budgets, etc.	2.7	2.7	2.5

C2. Create a page on the SLNC Web site to post electronic copies of all handouts used in all training programs sponsored by SLNC.

- All trainers should be expected to provide electronic copies of the handouts they will use in training programs before they present their programs.
- Post the handouts on the Web site the day the program is presented so that training participants will have immediate access to the handouts when they return to their libraries.
- All handouts should be printable and downloadable.
- Ideally, the handouts will be in Word, but some presenters may prefer to post PDF files.

Rationale: This will allow people to take notes on the handouts during the training program and download a clean copy when they return to their libraries. Almost two-thirds of the people who responded to the survey indicated that they had to do something with the information from the training program when they returned to their libraries. The percentages were consistent for both academic (64.3%) and public (63.3%). The types of follow-up required are listed in Table 13.

TABLE 13: REQUIRED FOLLOW-UP

	All	Public	Acad.
Share the program handouts with my colleagues	66.8%	69.1%	66.7%
Make a verbal report to the director or my supervisor	47.6%	49.8%	44.4%
Make a short presentation about the program at a staff meeting	43.9%	42.6%	50.0%
Make a written report to the director or my supervisor	22.9%	21.7%	31.5%
Replicate the training program for my colleagues	14.1%	12.9%	22.2%

C3. Ask trainers to develop a one-page summary of their training programs that can be used by participants to share information about the programs when they return to their libraries.

Rationale: Approximately one-third of the people who attend training programs are expected to make a short presentation on the program at a staff meeting. A summary sheet would make it easier for the staff member to make the required presentation and would ensure that the trainer’s main points are passed on accurately.

D. PROVIDE TRAINING IN MULTIPLE FORMATS

D1. Continue to offer a mix of face-to-face and Web-based training. Web-based training is most effective for short training sessions focused on technology applications and NC LIVE resources. Face-to-face training is most effective for longer training sessions that are designed to help participants develop communication, customer service, and management skills.

Rationale: Face-to-face training was selected by all participants as their preferred format. Both academic and public library staff members identified face-to-face hands-on training (software training in computer labs, etc.) as their preference. Face-to-face interactive training (small group work, etc.) was a close second and both groups selected face-to-face lecture training as their third preference. Fewer than 11% of the participants said they disliked any of these face-to-face formats. Web-based training was preferred by 55% of the academic librarians and library paraprofessionals and 43% of the public librarians and library paraprofessionals. It was disliked by approximately 20% of both groups. As a comparison, between 40% and 50% of both groups dislike teleconferences and video training.

TABLE 14: PREFERRED FORMATS

	All	Public	Acad.
Face-to-face hands-on training (software training in a computer lab, etc.)	76.4%	76.0%	78.6%
Face-to-face interactive training (small group work, etc.)	67.9%	67.8%	71.4%
Face-to-face lecture	61.5%	61.1%	64.3%
Web-based training	45.4%	42.7%	54.8%
Teleconferences	14.8%	13.6%	15.5%
Video training	12.1%	12.8%	9.5%

- D2. Develop a FAQ that describes exactly what computer hardware and software applications are required to take part in online training programs. Send it to every person who registers for an online course.

Rationale: Participants in several focus groups said the technology glitches made online training difficult. A one-page FAQ describing the hardware and software requirements would help to resolve problems before the participants try to take an online course.

- D3. Provide easy access to archived online training programs and publicize the availability of the archives.

Rationale: One of the people who participated in the telephone interviews said that it was too hard to get access to archived NC LIVE training programs. Once the electronic versions of the training programs have been developed, they should be available for as long as the content is current and accurate.

E. MARKET CE PROGRAMS

- E1. Explore creative ways to market CE programs. Consider RSS feeds and a dedicated CE listserv. Continue to email information on forthcoming CE programs to all email lists.

Rationale: Question 4 of the online survey asked the respondents how they received information about workshops and other continuing education programs. Respondents could indicate more than one source. Respondents from academic libraries rely much

more heavily on electronic resources to find information about CE than public library respondents, as can be seen in the table below.

TABLE 15: PR METHODS

PR Methods	All	Public	Academic
E-mail announcements	75.6%	73.7%	85.7%
Listservs (NCLA, NC LIVE, NCPLDA, etc.)	40.3%	32.5%	70.2%
Conversations with colleagues	35.9%	37.4%	31.0%
Drect mailings of flyers or other announcements	35.7%	35.0%	39.3%
State Library of North Carolina Web site	26.4%	23.5%	36.9%
State Library of North Carolina Update	17.1%	16.6%	19.0%
Other	9.5%	9.7%	6.0%

F. REVISE AND EXPAND EVALUATION PROCESSES

F1. Revise the form used to evaluate the training programs sponsored by SLNC to ask participants the following questions:

- What did you learn during this training program?
- What do you intend to do with the information you gained or skills you developed?
- Were the training program handouts practical, adaptable, and suitable for sharing with colleagues?

Rationale: The respondents who attended training programs were asked to evaluate that training on a scale of one (excellent) to ten (very poor), and their average evaluations were remarkably consistent. Overall, the average evaluation for programs sponsored by SNLC was 2.5 and the average evaluation for programs sponsored by other organizations was 2.4. There was very little information in any of the data to explain these rankings. Questions such as the ones in this recommendation will provide a more complete picture of the success and value of training programs. (See Recommendation C1, C2, and C3 for more information about what training participants expect from training programs.)

F2. Gather more data about each participant on the form used to evaluate training programs sponsored by SLNC to include:

- How many training programs the participant has attended during the current fiscal year and how many s/he attended during the preceding fiscal year
- The participant's position/classification and the length of time s/he has worked in the library
- How far the participant had to drive to attend the training program
- How the participant heard about the training program

Rationale: In 2006, almost 1,200 people participated in training programs sponsored by SLNC. There is no way to tell what proportion of those people were

first-time participants and what percent were repeat customers. It would be useful to know how many of the people who participate in training programs are regulars who participate in several training programs a year and how many are first-timers or people who attend training infrequently.

Both focus group participants and survey respondents indicated that travel time was one of the factors that affected people's willingness to attend training programs (see Table 3). It would be helpful to be able to compare that perception with actual data about travel time.

Survey respondents were asked how they received information about workshops and other continuing education programs. Respondents could indicate more than one source. By far the highest proportion of respondents (76%) indicated that they received information about training programs via email. Listservs were a distant second (40%). The SLNC Web site was listed as a source by 26% of the respondents and the SL Update by listed by 17% of the respondents. Again, it would be helpful to compare these perceptions with real data.

- F3. Develop a follow-up evaluation to determine if and how training participants have used the training they received – and if they have not used the training, why not. Select three programs each year for follow-up evaluation.

Rationale: The only way to truly measure the success of a training program is to determine what, if anything, the participant did with the new skills or knowledge gained during the training. If the participant did not use the new skills or knowledge, it is also important to know why s/he didn't.

- F4. Enter all evaluations into an Access database and create the report forms needed to access all information on the evaluation forms easily. Review the evaluation data regularly and make changes in topics, publicity, presenters, etc. as needed.

Rationale: There is no point in collecting data if that data isn't collated, easily available, and used to make decisions about future training.

G. UPDATE STATE CE PLAN

- G1. Repeat the online CE survey annually using an online survey utility that tabulates the data and provides reports.

Rationale: Training expectations, needs, and priorities can change quickly as the demands of the public change and new tools become available to library staff. The online CE survey should be revised as needed and replicated annually.

- G2. Use the information from the training program evaluations and the annual CE survey to update the state CE plan annually.

Rationale: The data from the survey can be used in conjunction with the data from an improved evaluation process to ensure that the training programs sponsored by

SLNC continue to meet the needs of local library staff and that the marketing, locations, and scheduling of those programs are effective.