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## Introduction

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### **Introduction to this chapter**

The aim of this chapter is to introduce the context of training in library and information services. It begins with a general introduction to the aims and intended audience of this book, and some of the current issues faced by library trainers. This is followed by a section which looks at the links between training practice and the strategic goals and objectives of the library or information service. It is helpful for trainers to be aware of these connections, as the more effectively our training is aligned with the needs of the library and information service, the greater will be its contribution. It will also make it easier to access resources and support for training activities. The next section presents many of the benefits of training, and this is a useful list which may be edited as required by individual practitioners who are making a bid for training resources.

The training cycle is then outlined, and this involves four stages: planning, design, delivery and evaluation. This chapter considers the planning stage, and highlights the importance of working with a range of stakeholders to ensure that you develop an appropriate training plan (and one that meets the library and information service's strategic aims and objectives). Many library and information trainers become involved in training when they are asked to design and deliver specific training events or courses. These subjects, along with training evaluation, are dealt with in much greater depth elsewhere in this book.

There are a number of financial and legal issues associated with training, and so library and information trainers need to understand and follow their organization's policies and practices with respect to these subjects. In this chapter I have provided guidance on key themes and I recommend that individual trainers follow their own organization's practices and, as appropriate, obtain specialist advice. For independent and self-employed trainers, it is vital that you ensure that you develop effective financial practices, and your accountant will be able to advise you. In terms of legal advice, there are many government and other agencies that are able to help.

The chapter ends with a guide to the structure of this book and the content of each chapter. This is followed by a list of references and additional resource materials.

### **Introduction to the book**

The aim of this book is to enable library and information workers to develop and deliver excellent training practice. The book provides guidance on the design and delivery of effective training courses and is aimed at helping experienced trainers, as well as those who are still developing their skills. It is a practical book which is aimed at library and information workers in all sectors who may be involved in training users, colleagues or other groups.

Individuals who may find this book of use include: library and information workers – public sector, private sector, voluntary organizations; learning, teaching and study support workers; knowledge workers; and library school students. Increasingly, library and information staff are being asked to do more and more with fewer resources. Training is often delivered by library managers, development officers and trainers who are on limited budgets and have access to few resources. Consequently, this ‘no-nonsense guide’ provides a straightforward and accessible guide to training practices and a wide range of tools and techniques which will suit different training contexts and situations.

The landscapes of library and information practice, including training, have been transformed in the last decade as a result of drivers such as rapid developments in information and communications technology, the move to a 24/7 culture, changing patterns of work and leisure, globalization, increased and changing expectations of stakeholders and the constant demand to work in a manner that is ‘smart, lean and agile’. Training programmes are constantly changing and developing, and in recent years the growing interest in e-learning has expanded and shifted its focus so that many practitioners are now involved in developing and delivering blended learning programmes which integrate face-to-face and e-learning activities.

In the context of higher education and further education, library and information workers are often involved in training large, diverse groups of more than 100 students, often with very limited resources. In public libraries, library staff may be involved in delivering a wide range of training activities to extremely diverse groups. Many library and information workers in special libraries deliver end-user and specialist training to busy professionals who are unlikely to have the time to attend pre-scheduled workshops.

In addition, the rise of the so-called ‘millennials’ (individuals born between 1982 and 2002), who are adept at using social networking tools and other information and communication technologies, has meant that training practices are continually changing to meet their expectations as they move from school to college or university and the workplace. Langan (2011) summarizes some

additional characteristics of the millennium generation as: having respect for authority but not necessarily for social hierarchies; being socially ambitious; and being unaware of their own lack of skills. The latter feature has implications for library and information trainers. According to Smith and Baker (2011), the millennium generation, as well as being very comfortable with technology, prefer teamwork and experiential learning, and they expect services to be available 24/7 in a variety of modes (face-to-face and online) with a quick response time. In addition, they are apparently more likely to use online resources than to visit the library. The millennium generation are also called 'digital natives' (Prensky, 2001), and this name is linked to the idea of individuals who have grown up with a diverse range of ever-evolving technologies which they use in their social lives, for e-commerce, for study and for work. One of the consequences of this millennium generation, who are now joining the library and information profession, as well as using the services, is that they demand a different type of training programme to meet their needs and expectations.

Working in these challenging times has led many library and information workers to develop a range of effective and innovative blended-learning training programmes which include: face-to-face events; drop-in workshops; online training; and the use of social media. They have developed the necessary skills by adapting and using new technologies such as Web 2.0 tools and Skype. This book provides guidance, based on current best practice, to help library and information workers to be successful in their delivery of training.

### **Contribution of training to library and information services**

Most organizations produce a strategic plan at regular intervals, and these plans identify the vision, mission and values of the organization, as well as its main aims and strategic objectives. These plans may be developed in a variety of ways, e.g. top-down, bottom-up or through an extensive consultation process which involves a mixture of top-down and bottom-up activities and processes. The organization's strategic plan may then be used by the library and information managers to write the library and information service's strategic plan.

The strategic aims and objectives of the library or information service will be aligned to and clearly contribute to the parent organization's own strategic plan. The training activities then need to support the strategic aims and objectives of the library or information service. There are a number of reasons why training activities need to be aligned with the library and information service's strategic aims and objectives. The first is that *all* activities need to be aligned to the strategic plan so as to ensure that the library and information service achieves its goals and objectives. This is particularly important when there are limited resources, because the resources that are available need to be focused on helping the library to achieve its goals. If the library or information service does not achieve its goals, then its future may be in jeopardy. The second reason is that

the strategic plan is a way of identifying priorities; the priorities of the library and information service are the same as those of the parent organization, and the training activities serve these priorities. The third reason is that aligning the training programme with the strategic plan is a way of demonstrating to stakeholders that the library and information service is supporting the current priorities and activities of the organization.

In large libraries where there is a significant training and development department, this department may write its own strategic plan as a sub-set of the library and information service's plan. Alternatively, the training and development plan may be integrated into the wider library and information service plan. These strategic plans are important, as they identify aims and objectives and priorities. Financial support is likely to follow the strategic plan, and activities that are not aligned with the strategic plan are unlikely to be supported.

### TIP FOR TRAINERS

Read your organization's and/or library and information service's strategic plan. What are the implications for your training activities? What should you be focusing on? Which activities or areas of activity need to grow? Which activities or areas of activity need to be reduced? ■

### Benefits of training

Training provides benefits for different stakeholders and it is often useful to consider these and present them to stakeholders when designing and developing training courses. The following lists of common benefits of training provide a set of headings (they may be expanded to fit particular contexts) which may be used to help in compiling a training proposal.

Benefits for the library and information service:

- increased productivity
- improved quality of work
- improved customer service
- development of a flexible workforce
- reduction in staff turnover
- reduced employee turnover, due to better supervision and management following leadership training
- reduced employee turnover, due to greater job satisfaction
- reduced recruitment costs, due to greater job satisfaction
- reduced recruitment costs, due to reduced turnover.

Benefits for staff who receive training:

- fewer errors

- correct implementation of policies and procedures
- improved knowledge and skills
- better quality of customer service
- saving of time through more effective use of systems
- increased productivity of new staff, due to effective induction training
- increased professionalism
- improved morale
- continuous professional development.

Benefits for customers:

- improved knowledge and skills
- improved performance through access to better quality of information
- increased satisfaction with the library and information service
- improved use of information and communications technologies
- saving of time through effective use of services and resources.

Putting figures on these benefits is very challenging. Here are some examples of the ways in which some trainers have attempted to demonstrate the benefits of their training events:

I work in a research library in the construction industry. One of my customers came and thanked me for teaching him how to use one of the databases. He was able to find information about a particular type of building defect. He said it has saved the company about £20,000. I asked him to put it in writing and used this to help demonstrate the benefit of training.

Information officer with a remit for training

Each year, the National Student Survey is used by universities in the UK to identify areas for improvement. This year, a number of different students in different faculties commented on how useful they found the workshop 'Finding information for your dissertation'. The senior managers in the library and university were thrilled – this information is widely available and it really demonstrated the value of our training sessions.

Academic liaison librarian

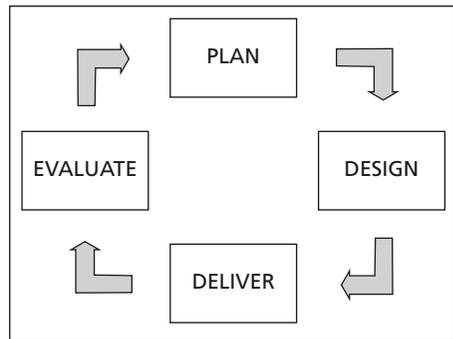
## **The training cycle and the planning stage**

Figure 1.1 illustrates the training cycle and indicates that it is made up of four stages: planning, designing, delivery and evaluation. This section is concerned with the planning stage, which is sometimes carried out by specialist training departments or library managers. Individual trainers are often involved in training at the next stages: design, which is covered in Chapters 5 and 6 (face-to-face

sessions) and Chapter 7 (e-learning and blended learning); delivery, covered in Chapters 5 and 6 (face-to-face); and evaluation, covered in Chapters 5 and 7.

The rapidly changing external environment means that training needs are constantly evolving. Training needs arise from the need to:

- bridge the gap between present and desired performance. For example, improving the usage of databases by ensuring that colleagues have more detailed knowledge of and skills in their use.
- improve performance so as to achieve continually rising standards. For example, ensuring that all customer service staff use all the features and functions of the catalogue system. Another example is related to the introduction of new systems, e.g. self-service systems, as a means of improving the quality of the service.
- do new and different things. For example, introducing new systems and services based on new, web-based tools and technologies.



**Figure 1.1** *Training cycle*

The start of the planning process involves establishing training needs by identifying the needs of the library and information service, of the staff and of the customers. At the level of the library and information service this may involve looking at:

- the strategic plan – where is the library going? What are the priorities?
- key performance indicators (KPIs) – what areas do we need to focus on and improve?
- feedback from quality assurance processes, customer surveys and other feedback mechanisms – what areas do we need to focus on and improve?
- the capacity for training – how much resource (people, time, money) can we invest in training?

Identifying staff needs may involve:

- looking at the outcomes of appraisal or performance management processes – what training is required?
- asking the staff themselves – what training do you think you need?
- asking team leaders and managers – what training do you think the staff need?
- looking at feedback from quality assurance processes, customer surveys and other feedback mechanisms – where do we need to focus staff training?

Identifying customer needs may involve:

- asking the customers themselves – what training do you think you need?
- asking staff who work on the front line (help desks, virtual reference services, etc.) – what training do you think customers need?
- looking at feedback from quality assurance processes, customer surveys and other feedback mechanisms – where do we need to focus customer training?

In addition to using working documents, this process of identifying training needs requires research and it is likely to involve interviewing the following people:

- senior managers
- middle managers and team leaders
- internal customers
- external customers
- intended training participants
- other interested stakeholders.

The consultation process may involve asking a few basic questions:

- 1 What do you think should be the main aims and objectives of the training activity?
- 2 What do you want us to achieve in our training activity?
- 3 Who do you think should be involved in the training programmes?
- 4 What difference do you want us to make to the working of the organization/department?
- 5 How would you judge success in our training activities?

The information collected during the training needs analysis will inform the development of a training plan, which may include the following:

- overall aims of the training plan
- rationale and link with strategic plan(s)
- main objectives of the training plan
- main KPIs
- approach(es) to learning and development to be used, e.g. main areas of activity, types of activities (face-to-face training, coaching, e-learning or blended learning, workplace learning)
- indication of who will be involved, e.g. trainers (internal or external); who will be the participants; links with stakeholders, e.g. managers and leaders across the organization
- indication of the cost of the training activity.

The training plan will need to be approved by senior library and information staff, and possibly by senior staff within the parent organization.

**The financial side of training**

How do you cost a training event? The basic cost of any training event is based upon:

- number of participants – different events will be costed in different ways. In some, the participants will pay to attend the event. In others, the cost of the participants’ time must be taken into account
- cost of the trainer’s time – an external trainer will charge a fee. For internal trainers, their cost can be calculated using a standard equation (see Table 1.1)
- cost of travel and subsistence
- venue – the cost of using an external venue such as a hotel. However, using in-house space has a cost associated with it too
- technology requirements – an external venue such as a hotel will charge for the use of its technical facilities. However, using in-house technology also has a cost associated with it
- learning resources – the cost (staff time) to prepare and then reproduce or distribute them
- promotion – the cost (staff time) to prepare and then disseminate the information
- administration – the cost (staff time) involved in administering the event.

The main cost of any training activity is staff time. Many organizations have standard procedures for calculating staff time. If you need to calculate this for yourself, the equations presented in Table 1.1 can be used to calculate the cost of staff time for attending an event.

<b>Table 1.1</b> <i>Useful equations for costing staff time</i>
<b>Calculate the daily rate of staff using the following two equations:</b> Daily rate = (annual salary + on-costs)/days where days = working days per year – (annual leave + weekends + statutory days + sick leave)
<b>Calculate the cost for each participant in the training using the following two equations:</b> Daily rate/number of hours worked per day = hourly rate Cost of one person = hourly rate x number of hours of training event
<b>Total cost of staff time involved in attending training event =</b> Sum of costs of each participant
<b>Total cost of trainer time =</b> Daily rate of trainer x number of days worked on training event (preparation, delivery and follow-up activities)

## Legal issues

It is important to be aware of some of the legal issues associated with training and to have a general understanding of the following topics (if they are applicable to your training practice):

- child protection (for individuals working with children)
- copyright and intellectual property
- corporate manslaughter
- data protection
- disability issues
- freedom of information
- health and safety
- employer's liability insurance.

This list isn't meant to be scary, but it does demonstrate that there are a variety of legal issues relevant to training. It is beyond the scope of this book to provide legal guidance and, if in doubt, you should obtain advice from your manager or a relevant specialist or solicitor within your own organization. Typical situations that occur in training practice include:

- the need for the trainer to ensure that the training environment is safe. If in doubt, contact the appropriate health and safety officer
- the need to obtain written permission to use other people's training materials or resources
- the need to comply with data protection law and not to provide personal information to a third party
- the need to make reasonable adjustments for individuals with a disability who are attending the training event.

For independent, freelance or self-employed trainers it is vital to have professional indemnity insurance (called errors and omissions, E&O, in the USA), as this helps to provide protection in terms of potential litigation relating to the provision of incorrect information or advice, or a claim of negligence. It is often possible to obtain this type of insurance via a professional association (which may offer a discount on premiums) as well as through insurance companies.

## Structure of the book

This book is divided into two parts: Part 1 is concerned with training practice, i.e. planning, designing and delivering training events, including e-learning and blended learning programmes; Part 2 is concerned with learning in the workplace. It offers more than 90 approaches to developing learning activities in the workplace.

Part 1 begins with Chapter 2, which considers different approaches to learning and teaching. It starts by exploring three main approaches: content or trainer centred, where the focus is on what is to be taught; student centred, which, as the name implies, put students or learners at the centre of the learning process; and finally social approaches. Social approaches to learning are particularly relevant in continuous professional development, where formal or informal learning communities are often developed as part of the training strategy. Currently, there is a shift in training in the workplace to designing development programmes which are integrated into workplace practices. This is the so-called 70:20:10 model, which is explored in the chapter. Finally, Chapter 2 ends with an exploration of three different models of learning styles and their relevance to training; of Bloom's Taxonomy of Learning; and of the Learning Competences model. These learning theories have been selected as they are extremely relevant to training practice in a variety of contexts.

Chapter 3 is concerned with making training interesting, i.e. using a range of learning and teaching methods, and it looks at a number of standard training methods:

- action planning
- activities
- case studies
- demonstrations
- discussion groups
- drop-in sessions
- games
- group work
- guest speakers
- hands-on sessions
- ice-breakers
- inquiry-based learning
- lectures and presentations
- problem-based learning
- stories and metaphors
- surveys and questionnaires
- treasure hunts.

These methods have been selected because they cover many of the standard training practices in library and information work. There are other approaches to learning and training, and many of them are described in Part 2 of this book.

Chapter 4 focuses on using a range of technologies to support training practice. One of the challenges of writing this chapter has been the speed of change and the continuing availability of new tools and techniques to help support training activities. Consequently, the chapter focuses on providing a general overview of the different ways in which current technologies may be incorporated into training programmes. It covers a range of ICTs (information and communication technologies) in some detail.

Chapter 5 is about 'making it happen', which involves knowing your learners and their needs. The chapter includes sections on: design principles; evaluation of training; and marketing and promoting training events. Although the design principles relate to all types of training (face-to-face, e-learning and blended learning), the main focus of this chapter is the design and evaluation of face-to-

face training. E-learning and blended learning are considered in more detail in Chapter 7.

Delivering face-to-face training is the focus of Chapter 6, which is concerned with the practical aspects of running training sessions, including: getting started; managing the learning process; dealing with questions; ending the training sessions. A number of common training situations are explored in some detail, with a focus on teaching large groups and making database training interesting.

E-learning and blended learning run as a theme throughout all the chapters, but are dealt with as a separate topic in Chapter 7. This provides an opportunity to explore these two approaches to training in more detail and to consider how to design, deliver and evaluate such programmes. There is also a section which considers the skills required by e-tutors.

Part 2 of this book consists wholly of Chapter 8, which offers an exploration of over 90 approaches to learning in the workplace (Table 1.2). This chapter is

**Table 1.2** 90+ approaches to work-place learning

1	360 degree feedback	35	Exchanges	66	Professional journals
2	Accreditations	36	Exhibitions	67	Professional organizations
3	Action learning	37	Exit interviews	68	Project work
4	Action planning	38	External funding	69	Promotion
5	Analysing mistakes	39	Feedback	70	QR codes
6	Appraisal processes	40	Fishbone diagram	71	Quality assurance activities
7	Apps	41	Focus groups	72	Quizzes
8	Asking advice	42	Frequently asked questions	73	Reading
9	Asking and answering questions	43	Gap year	74	Reflection
10	Audio recordings	44	Induction	75	Retreats or residentials
11	Benchmarking	45	Instructions	76	Rich pictures
12	Blogs	46	Internet	77	Secondment
13	Book reviews	47	Interviews	78	Self-assessment tools
14	Briefing papers	48	Job rotation	79	Setting deadlines
15	Briefing sessions	49	Key performance indicators	80	Speed networking
16	Cascade training	50	Learning boxes	81	Sticky notes
17	Celebrating success	51	Learning contracts	82	Study tours
18	Coaching	52	Learning conversations	83	SWOT analysis
19	Communities of interest	53	Learning journals	84	Teamwork
20	Competitions and prizes	54	Meetings	85	Training a colleague
21	Complaints	55	Mentoring	86	Twitter
22	Conferences	56	Metaphors	87	Video clips
23	Covering for holidays	57	Mind mapping	88	Visits
24	Crises	58	Networking	89	Wikis
25	Critical friend	59	Online discussion groups	90	Work-based learning qualifications
26	Delegation	60	Online tutorials	91	Work shadowing
27	Demonstrations	61	Organizing events	92	Working parties
28	Displays	62	Personal development planning	93	Writing
29	E-bulletins	63	Personal development portfolios	94	YouTube
30	E-learning	64	Playing cards		
31	Electronic mailing lists	65	Presentations		
32	E-mails				
33	E-portfolio				
34	Evaluating different products				

included because training budgets and resources to enable individuals to attend training events are increasingly tight. This means that workplace learning is becoming very important, and a popular model is the 70:20:10 framework (see Chapter 2). The basic idea behind the 70:20:10 framework is that 70% of learning takes place in the workplace by means of dealing with challenging activities; 20% involves learning from colleagues; and 10% is based on courses and reading. This section is integral to the book, as it helps to promote a wide range of activities for workplace learning, which it is hoped will offer inspiration to readers of this book to develop these ideas in their places of work.

### Summary

The aim of this chapter has been to introduce the reader to this book and to the current context for training practices in library and information services. This has included a discussion on the contribution of training to the achievements of library and information services, and the importance of aligning training and development practices to strategic aims and objectives, which enables training to make an impact on the organization and its staff and stakeholders. This was followed by an introduction to the four-stage training cycle (planning, designing, delivery and evaluation) and an outline of the initial planning stage. The two important areas of financial and legal issues in training were then brought into play. This book is divided into two parts, Part 1: Training Practices and Part 2: Learning in the Workplace, and the remainder of Chapter 1 provided an outline of the content and focus of each chapter, enabling the reader to identify their starting point for either working through the whole book or dipping into relevant sections as desired.

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