SJSU Library Staff Training and Professional Development Working Group Report

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1 INTRODUCTION

The San Jose State University Library Staff Training and Professional Development Group (hereafter referred to as "the Group") was formed in March 2006, and was charged with researching and proposing a comprehensive set of recommendations for the professional development and training needs of all SJSU Library personnel. The ultimate purpose of this group was to support the University's "commitment to improving the campus work environment and infrastructure, specifically to provide staff training and development for the University's faculty and staff, and to improve employee satisfaction" (Appendix A, *SJSU Library Staff Training and Professional Development Working Group Charge*).

In beginning its task, the committee further refined its activities with the creation of the following mission statement:

> The mission of SJSU Library Personnel Training and Development Program is to promote the development of Library personnel and to encourage a collaborative and collegial working environment in the Dr. Martin Luther King, Jr., Library, reinforcing the larger goal of life-long learning for all.

In carrying out its task, the Group felt that it was desirable and necessary to ensure that the largest number of staff members possible be given the opportunity to provide input into the information gathering portion of its activities. The information gleaned from information-gathering sessions and discussions forms the basis for this report.

2 NEEDS ASSESSMENT

In preparation for this report, the Group engaged in a number of activities. Specifically, the Group completed the following initial activities:

o   A review of recent literature.

o   A survey of five California State University libraries.

o   A review of existing University Library policies and guidelines.

o   A review of the past state and current status of the Library's training and professional development activities. See Appendix B for the working document.

2.1 REVIEW OF CURRENT STATUS

Prior to the commencement of the Group's work, training and professional development in the University Library had the following features:

o   A single-topic workshop approach.

o   Annual allocations of $500 per faculty member and $300 per staff member.

o   Dependence on Lottery Grants to support critical training needs.

o   Uncertainty about which training or professional development activities would receive funding.

o   A tapering off of SJSU/SJPL joint training and development activities since the opening of the King Library in 2003.

2.1.1 INPUT FROM LIBRARY PERSONNEL

Input from Library personnel was obtained formally through discussion group sessions as well as informally through in-person conversations and email exchanges with individuals. The content of this input is summarized in this section.

Five one-hour discussion groups were held, two for staff, one for faculty, one for MPPs, and one for personnel from any classification. Each group was facilitated by a staff member from SJSU's Counseling Services. All groups responded to the same set of seven questions. The questions and a full list of responses appear in Appendix C.

2.1.1.1 Discussion Group Themes and Goals

A number of common themes emerged across the discussion group sessions. The themes were collapsed into five general areas and are presented with a sample of the specific suggestions in the table below.

Theme	Suggestions

Support
 (Time, Money, Expertise)
	o Allow work time to be used for training and development activities.
	   - Allow individual and/or group practice; incorporate training and development activities *into* work rather than adding to existing workloads.
	   - Set target minimums for ongoing training activities (e.g. two hours per week, eight hours per month).
	   - Encourage managers to provide release time for relevant activities.
	 o Quantify and publicize the annual financial commitment.
	   - Make the commitment to providing financial resources available for training and professional development explicit.
	   - Make recordkeeping on expenditures transparent.
	 o Create internal support systems.
	   - Implement a "buddy" system for new employees.
	   - Establish domain-area experts to act as resources.
	 o Create a Library Personnel Development Specialist position (hereafter LPD Specialist).

Communication, Sharing, and Accountability	o Create consistency across all University Library units. o Provide opportunities for shadowing in other units and/or job-sharing. o Require an accountability component for all Library-funded activities.
Inter-Unit Consistency	o Create a formal Library-wide orientation program for new employees. o Have individual units and sub-units/teams create formal orientation programs. o Incorporate different learning styles and modalities in selecting, designing, and presenting training information.
Leadership Development and Advancement	o Establish a formal or informal mentoring program. o Provide essential or discretionary funds and/or release time to support leadership-development activities. o Provide rewards and incentives; hold recognition events.
Effective and Responsive Planning	o Explicitly incorporate needs training into long- and short-term strategic planning; review and evaluate progress and needs on a regular basis. o Incorporate training explicitly into job descriptions and evaluation processes. - Allow and encourage the participation of individuals being evaluated in setting goals.

3 RECOMMENDATIONS

The Group recommends that the Library develop and support an ongoing learning/training and professional development program that supports the Library's mission and strategic plan and acknowledges that the Library's current strategic-planning process may inform future directions for training and staff development.

3.1 SECTION OVERVIEW

An important component of the Library's learning/training efforts will increasingly focus on the digital information and teaching/learning environment. The Library needs to prepare the faculty and staff to meet the challenges of the digital environment which is fast-paced, complex, and ever-changing.

The Group recognizes that learning is a shared responsibility of the Library and each individual and that all Library personnel are expected to play an active role in formulating and implementing training needs and professional development opportunities. Learning is an essential component of our work and furthers our goals of providing high-quality services to the University and the broader community. All Library personnel have a responsibility to keep current with changing technologies and practices in a profession.

The Group recommends that essential activities of all Library staff be supported and fully funded by the Library. Essential activities are those required for the achievement of the Library's strategic goals and/or the performance or enhancement of Library functions. These activities also include training support for new or existing Library services and for librarians' pursuit of tenure and promotion.

3.2 TRAINING

This table below summarizes recommendations for initial Library-wide high-priority training needs, unit-level training needs, staff and faculty training, and student assistant training.

Scope	Training Recommendations
Library-Wide	Initial high-priority needs are as follows: o A systematic new employee and student assistant orientation program, incorporating the development of a new employee handbook and revision of the current student assistant manual. o Activities that create and/or reinforce awareness of how the Library functions as a whole. o The Library's public website and intranet. o Customer service topics such as negotiating interactions with challenging patron and sensitivity to issues of diversity. o Development of leadership, supervisory, and mentoring skills. o Basic and advanced uses of common desktop applications (e.g. Microsoft Excel, PowerPoint, and Word). o Time management, organization, and running effective meetings.
Unit-Level	o Units have the responsibility to identify their unique training needs on an annual basis and to submit training requests to the appropriate administrator. o Student assistants' training needs should be incorporated into the unit-level training plans.
Staff and Faculty	o Opportunities to participate in essential and appropriate training and development activities should be supported at all levels. o Release time is critical for attendance at these activities as well as time to reflect, assimilate, and utilize the knowledge gained through these activities. o For staff, essential training activities may be reflected in the "goals" section of the annual performance evaluation. o Individual are responsible to share the knowledge, information, and/or skills learned with Library colleagues. This sharing may take the form of a written evaluation, a presentation, a training session, or other appropriate forums.
Student Assistants	o Opportunities to participate in appropriate training activities to the fullest extent possible. o Budget allocations should include support for paid training time. See Appendix D for some specific recommendations regarding the training of student assistant and their supervisors.

3.3 PROFESSIONAL DEVELOPMENT

Opportunities to grow and develop as professionals appear to be critical to motivating many University Library personnel. This section offers recommendations for administering the professional development of personnel.

3.3.1 All Personnel

All Library personnel are expected to—

- o Play an active role in formulating and implementing their own professional development plans, including setting and assessing career goals.
- o Contribute a minimum of 10% of their proposed expenses from their own funds. The percentage may be higher if less than 90% funding is received for the activity.
- o Share knowledge, information, and/or skills learned with Library colleagues. This sharing may take the form of a written evaluation, a presentation, a training session or other appropriate forums.

3.3.2 Faculty

Funding is a critical element towards the successful fulfillment of the requirements for the six-year retention tenure process, promotion, and the expectation that scholarship and professional contributions will continue to be a part of the faculty member's professional life.

A high priority for SJSU Librarians is obtaining funding assistance for active participation and leadership in the individual librarian's academic discipline and/or professional community. Participation may include presentations, editorial responsibilities, etc. The Library Faculty have formed a working group to develop criteria for distributing available Library funds to librarians for activities that support both the goals of the organization and the individual's professional activities and research.

The Library Faculty working group will draft the criteria for review and approval by the Library Faculty as a whole by the beginning of the 2007 spring semester. The criteria will be appended to this report.

3.3.4 Staff

For the distribution of professional development funds to staff, the Group recommends a simple proposal-based application system. Applicants provide a rationale, budget, and supporting documentation. See Appendix E for specific suggestions regarding the proposal evaluation process.

The following are some examples of professional development activities for staff:

- o Leadership development.
- o Training or awareness of forward-looking trends, such as technologies not considered essential but which could become relevant in the near future.
- o Professional networking opportunities.

3.3.5 Student Assistants

Although the Group does not recommend devoting professional development funds to support the professional development of student assistants, we acknowledge that they comprise a significant percentage of Library personnel and are an integral part of meeting Library goals.

3.4 FINANCIAL SUPPORT

The section below summarizes historical funding patterns and suggests new funding targets for the Library's training and professional development program and concludes with recommendations for the Lottery Grant process.

3.4.1 Historical Funding Patterns

One of the factors contributing to the establishment of the Group's charge was the method of allocating Library funding. In the recent past, a set amount of funding was allotted each year to employees, with additional amounts available from the competitive Lottery Professional Development Grant Application process. Lottery Grant funds are awarded in support of the instructional mission of the University. This situation was unsatisfactory, however, because staff often were compelled to seek Lottery Grant funds for training in skills which were necessary in the performance of their day-to-day jobs. Moreover, faculty members are required to establish a record of scholarly or professional contributions to meet the requirements for retention, tenure, and promotion. The system of allotting funds, as it then stood, did not adequately address these needs.

The Library's annual expenditure for travel, professional development, and training over the past three years appears to have been approximately $30,000-35,000 per year. This figure includes the approximately $20,000 per year that has been paid for through the use of Lottery Professional Development Grant funds but does not include the approximately $5000-7000 per year in administrative travel funds.

Under the previous system of individual allocations of $300 staff member/$500 faculty member, 100% participation would have resulted in an annual expenditure of approximately $30,000. Since the actual expenditure from Library funds appears to be $10,000-15,000 per year, only about half of eligible Library personnel were taking advantage of the individual allocation system.

3.4.2 New Funding Targets

The Group recommends developing a plan to raise the annual funding target for training and professional development to 3% of the salaries of all Library personnel combined. The 3% figure is presented as a commonly occurring target percentage in *Staff Development: A Practical Guide* (Avery, Dahlin, & Carver, 2001). Currently that amount would be about $150,000.

In recommending significant increases in support for training and professional development activities, the Group is aware that these changes may need to occur over a period of time. Open communication regarding progress toward the target level of funding would help assure personnel of the Library's financial commitment to personnel development.

3.4.2.1 Unit-Level Financial Planning

A budget for essential training funds should be developed annually (or semi-annually) for each unit based on the high-priority training needs identified by the unit head in consultation with the unit members and the appropriate administrator.

Professional development funds for staff should be identified based on the number of FTEs in the Library plus a differential amount as needed to accommodate foreseeable high-cost activities. Differential amounts should be determined in consultation with the unit heads.

3.4.2.2 Guidelines for Faculty Members

Guidelines for Library faculty remain to be determined. See the Faculty Statement above.

3.4.2.3 Guidelines for Staff Members

The Group recommends that funds for staff members' professional development activities be sufficient to support a minimum of two relatively low-cost activities per year and one high cost-activity every three years for each staff member. Low-cost activities may include taking a class or workshop, while a high-cost activity might be attendance at a conference. Support for the high-cost activity is instead of—not in addition to—support for low-cost activities for the year in which the support is granted.

Staff members working at a capacity of less than full-time for the Library should receive funding at a rate proportional to the percentage of time they work for the Library. For example, a part-time staff member working 50% for the Library would be entitled to 50% of a full-time staff member's support.

3.4.3 Lottery Grant Distribution

Regarding the Lottery Grant distribution process, the Group's primary recommendation is to increase awareness of and adherence to established CSU and SJSU Academic Senate policies and procedures. The Group believes that compliance will help improve consistency and promote accountability.

An effort should be made to direct applicants and Lottery Grant Committee members to review the relevant documents. In particular, attention should be drawn to statements regarding the intended use of Lottery funds, such as supporting the instructional mission of the university and creating benefits for students.

The Group recommends that the coordination of the Lottery Grant process be made a duty of the Library Personnel Development Specialist with the Library Personnel Development Council (see the section on Program Administration, below) providing a supporting role as needed until the annual Lottery Grant Committee is elected.

Because the Library does not have a "student" component analogous to that of academic departments, the Group recommends that the Library satisfy the requirement to provide notification of the Lottery Grant process to students by ensuring that unit heads are made aware that Library student assistants may submit proposals to the Library's Lottery Grant Committee as long as their proposals have relevance to the Library or librarianship.

The Group recommends that the Lottery Grant Committee provide a written rationale for each funding decision and be prepared to provide this rationale to applicants if requested. This recommendation is intended to provide an educational opportunity, not an appeal process.

3.5 PROGRAM ADMINISTRATION

The Group recommends that the Library's training and professional development program be administered by a Library Personnel Development Council and a Library Personnel Development Specialist.

3.5.1 Library Personnel Development Council

The establishment of the Library Personnel Development Council is an important component of this plan. The Council will work with the Library Personnel Development Specialist to implement the proposed plan and to insure that it supports the goals of the University Library's Strategic Plan.

3.5.1.1 Membership

o   Six term-limited members: Three staff members and three faculty members, each nominated by unit heads or colleagues with agreement by the nominee. Eligibility is rotated among units and sub-units to ensure Library-wide representation.

o   One permanent member: Library Personnel Development Specialist (Chair)

3.5.1.2 Service Commitment and Benefit

o   Meetings are held on a monthly basis.

o   Each rotating member serves a one- or two-year term such that two members (one faculty and one staff) are replaced annually.

- o Staff representatives receive service credit in their performance evaluations.
- o Faculty representatives receive service credit to the Library in their dossiers.

3.5.1.3 Example Responsibilities

- o Create and maintain the content of the SJSU Library Personnel Development web-based presence.
- o Plan the annual welcome reception for new employees.
- o Conduct an annual assessment of training and learning needs.
- o Coordinate Library-wide personnel development activities.
- o Develop ongoing mentoring and job-sharing programs.
- o Schedule brown-bag forums presented by Library personnel.

3.5.1.4 Annual Retreat

The Library Personnel Development Council will hold an annual one-day retreat to plan the upcoming year's events and to reflect on the activities of the previous year. Unit heads will be invited to participate in an effort to maintain consistent support for the Library personnel development activities throughout the Library as well as gathering additional input for unit-specific development and training needs. The retreat will take place off campus and will be financially supported by the Library. At times, an outside facilitator or visit to another campus may be beneficial to exchange ideas.

3.5.2 Library Personnel Development Specialist

The importance of establishing a staff position devoted to supporting the training and professional development needs of Library personnel was a recurring theme amongst the brainstorming sessions conducted by this committee. The title Library Personnel Development Specialist is recommended in that it implies a position that supports both faculty and staff in the Library.

The incumbent should possess excellent training skills and a related background. Planning and program development is an essential part of the Library Personnel Development Specialist's job.

3.5.2.1 Primary Duties

The recommended LPD Specialist's duties may include the following:

- o Develop, administer, and evaluate the Library Personnel Development Program.
- o Develop and implement ongoing program assessment strategies.
- o Chair the monthly Library Personnel Development Council meetings.
- o Participate as a member of the University Library Leadership Team.

- o Serve as the University Library's representative on joint training and development committees.
- o Meet regularly with unit heads to inform and maintain consistency of support across the Library.
- o Liaise with SJPL, SJSU Human Resources, The Center for Faculty Development, and other related organizations.
- o Write letters of service for faculty and provide verbal input to performance review for staff members of the Library Personnel Development Council.

A preliminary draft of the content for a job description/announcement is included in Appendix F.

3.5.2.2 Authority and Reporting Relationship

The Group recommends that the LPD Specialist reports directly to the Associate Dean who is charged with supporting the operational needs of the Library.

3.5.3 Other Roles

Other important actors and their recommended roles are discussed in this section.

Actor	Role
Dean and Associate Dean	It is the belief of the Group that the successful implementation of a comprehensive and coordinated Professional Development and Training Program is dependent on the support and leadership of the Dean and Associate Dean. To this end, both need to be proactive in conveying the value of the program, understand and promote the importance of professional training and development consistent with the ever changing environment in which Library personnel work, help identify the core competencies required to provide service excellence, find resources and support new methods that will expand organizational learning and growth, and engender the core values and goals of the Library and university community.
Unit Heads	Unit heads are positioned to make informed decisions about prioritizing training and professional development activities, given their knowledge of operational needs, their role in shaping the strategic plan for the Library, and their responsibility for developing unit-level goals. The unit heads may need additional support and training to take the lead role in ensuring that training and professional development funds are spent in ways that benefit the Library as a whole.

Actor	Role
Individuals	All Library personnel are expected to be active participants in determining training needs for their units and the Library as well as the components of their own professional development.

3.6 COLLABORATIVE OPPORTUNITIES WITH SAN JOSE PUBLIC LIBRARY

There are many opportunities for San José State University Library and San Jose Public Library to collaborate on staff development activities. The benefits of collaboration may include cost maximization for joint activities, increased team building, and continued shared experiences and knowledge between SJSU and SJPL employees.

Implementation of shared and cooperative staff development in King Library would require a commitment to the following:

- Identification of training needs common to multiple units and/or both organizations.
- Creation of processes to coordinate, publicize and implement joint programs or events designed to satisfy those common needs.
- Provision for support and resources for these joint staff development activities.

Merged or collaborative staff development activities may be appropriate in, but not limited to, the following areas:

- Public service.
- Technology and electronic services
- Technical services
- Learning services
- Orientation events, outreach, and programming

4 CONCLUSION

In making these recommendations, the Group recognizes the need for the Library's training and professional development program to remain responsive to changes in the University's and the Library's strategic direction. Constant review and revision, coupled with vigorous assessment, will be critical factors in determining the initial outcomes as well as ensuring the ongoing success of the program. Periodically gathering input from Library personnel will help ensure the relevance of the program's goals to its intended beneficiaries.

The engaged and enthusiastic response from Library personnel for this project indicates broad support for a Library training and development program that is responsive to their needs and reinforces the Library's mission within higher education.

4.1 ACKNOWLEDGEMENTS

The Group would like to thank Wiggsy Sivertsen and her staff at SJSU Counseling Services, especially Blanca Escoto and Kell Fujimoto, for their invaluable assistance in conducting the discussion sessions.

The Group would also like to thank all the University Library personnel who made contributions to this report, either through participation in the discussion sessions or during informal communications with PDWG members.

The Group would like to acknowledge the Dean's support of this project.

APPENDICES

A. SJSU LIBRARY STAFF TRAINING AND PROFESSIONAL DEVELOPMENT WORKING GROUP CHARGE

March 7, 2006

Purpose:

All library organizations must be poised to respond quickly and competently to the changing demands of society and the communities which we serve. The University Public Library merger makes this ever more imperative thus requiring a new commitment to staff development. San Jose State University has made a commitment to improving the campus work environment and infrastructure, specifically to provide staff training and development for the university's faculty and staff and to improve employee satisfaction. The University's Strategic Goal Three, Improving the Campus Work Environment and Infrastructure focuses upon development, culture and staff satisfaction. In support of this University Goal, the University Library Strategic Plan Initiative Six, Learning Atmosphere and Work Environment, Objective Five provides for improved systematic training, development, and mentoring for library faculty and staff. The establishment of the *Library Staff Training and Professional Development Working Group* is in response to these existing priorities of the University and the Library.

Composition of Group:

The SJSU Library Staff Training and Professional Development Working Group is composed of library faculty, library staff and MPP staff. Each of the functional units of the library is also represented. Each individual on the group is expected to commit considerable time to the research, reading, discussion, analysis, and writing of the group's final recommendations. Managers in all areas are expected to make it possible for all to do this by adjusting assignments and deadlines in consultation with each working group member.

Scope of Charge:

The working group is charged to research and propose a comprehensive plan for the professional development and training for library faculty and staff at all levels. The work of the group will conclude with a written report that makes recommendations for a University Library Staff Training and Development Program. It is possible that one of the recommendations may be to establish an ongoing staff training and development team. If that is the case a team will be created at that time. The working group is charged to:

- Prepare a mission statement and goals for a University Library Training and Development Program;

- Examine the current status of training and development for the SJSU library organization;

- Solicit input from library administration, unit heads, supervisors, staff members, and library faculty on training and development needs;

- Recommend a structure for training and professional development specifically addressing the distinctions in approach for library faculty development, on-the-job training within departments including technical skill-specific training, leadership/management training, and organizational development and library-wide training and development activities;

- Recommend a methodology for distributing staff training and development funds to library faculty and staff;

- Recommend a methodology for review of lottery funds for professional development activities;

- Recommend criteria and priority of staff training and development funding for student employees;

- Recommend how the program should be administered – for example who should be responsible for managing this function – designated coordinator position, team or committee, individual departments, or a hybrid approach incorporating all three;

- Recommend initial library-wide development activities;

- Recommend future direction for collaborative staff training and development activities with the Public Library;

- Recommend additional sub-committees if needed.

Resources:

The following should be reviewed to ascertain what previous work has been done in this area within the University Library:

- "University Library Staff Development Team Mission and Team Structure" document dated April 2002;

- "Multi-Year Training-Learning Plan" (Creth Report), 2004

- "University Library Travel Guidelines" Approved 2004

- Current training activities in both public and university library organizations (as compiled by KLOSET);

- Other related documents.

The working group should also review recent library literature and other university web sites to identify best practices in staff training and professional development at university libraries other than SJSU. The working group is expected to consult with Unit Heads, various library teams and individuals regarding their training and development needs.

Timeline:

The final report including recommendations is due July 15, 2006. The working group co-chairs will be asked to give status reports at the ULLT meetings, library faculty meetings and all-staff meetings regularly scheduled prior to that.

B. CURRENT AND PAST TRAINING AND PROFESSIONAL DEVELOPMENT PRACTICES

Current and Past Staff Training / Professional Development

  Practices at the SJSU Library

Commitment to Staff Development

 - Library Administration has consistently expressed an interest in promoting Staff training and professional development. A Staff Development Committee was formed as long ago as the mid-1980's and continued its activities up until around the time of the joint library venture. An effort to re-establish this group was made this year, as is evidenced in the current Strategic Plan:

Initiative 6: Learning Atmosphere and Work Environment.

 Objective 5: Establish a development and training plan for every Library employee.

> "The Library fully supports the SJSU goal of developing and retaining a team of well-qualified employees to meet the needs of the University. The development and training plan will work to enhance employee expertise and skills, create a service-oriented professional culture, and improve employee satisfaction, as King Library becomes a regional information hub. A Staff Development Committee will be formed to organize in-library training needs and provide mentoring support to new staff."

  (SJSU Library Strategic Plan AcademicYear 2005/2006, p.16)

- In the past, membership in the SDC was drawn from all over the academic library, with representation from most of the various units, and the majority of the training was conducted by Staff members or faculty/staff from the University at large.

- The SDC's primary task was to monitor Staff training and development needs, arrange for training, etc., to meet those needs, evaluate these programs, and to keep Staff informed of training opportunities which might exist outside our institution.

- Examples of past training: How to Handle Problem Patrons, Managing Violence in the Workplace, The Library's Public Face, Drugs and Sports, American Music: How Blue Does it Get?, etc.

Training Levels

- Training for Library personnel can and has taken place on three different levels:

       1. Internal Library training

          A. SJSU Library faculty/staff

              - May be unit based, or even individual focused, including specific job skills, training of new Librarians/Staff in procedures, etc.

              - Annual retreats

              - Development of procedural or other training materials

- Mentorships

- Might include job rotation program, such as was conducted in the late 1980's-early 1990's, allowing individuals to work at another position or in another area of the Library for a given length of time.

B. Merged SJSU/SJPL King Library faculty/staff

- Particularly frequent during move into joint facility

- Past examples: Team Lead Trainings, Dealing with Change, Millennium Trainings, etc.

2. Campus-based training

A. Through SJSU Human Resources (HR) office

- At various times, HR has offered a full schedule of training opportunities to all campus employees, although none were scheduled for 2005/2006.

- Past examples: Time Management, Role of the Work Lead, Setting Goals and Expectations, Process Mapping Teams, Discrimination and Harassment Prevention, Managing the Grievance Process, etc.

B. Through the Center for Faculty Development

- The Center offers a wide variety of workshops each month

- Past examples: Lotus Notes, iLife Overview, How to Create Web Pages, PowerPoint Presentations, Diversity, Etc.

- www.sjsu.edu/cfd/events

3. External training

A. Cal State System-wide Professional Development

- Training offered through the Cal State system and held at a variety of campuses.

- Somewhat costly ($180-200) and often requires travel expenses.

- www.TheSource.calstate.edu

B. Other external sources of training

-InfoPeople, training at conferences, etc.

Training Funds

- Funding for training may be forthcoming on either an institutional or individual basis:

> 1. Institutional funding covers the expense of library-wide and other general training of Faculty/Staff. Individual employees do not need to seek funding for this type of training.

> 2. Individual funding must be sought by each employee to cover personal training costs and may come from a number of sources:

>> A. Annual Travel/Training Funds

>>> - Annual travel funds provided at the rate of $500 per year for Library Faculty and $300 per year for Library Staff, as set forth in the Travel Guidelines approved 17 May 2000. Prior to that date funding was provided on a case-by-case basis, with priority being given to requests where active participation in an event (such as presentation of a paper, etc.) was documented or where it would otherwise have a direct influence on an individual's job performance, tenure, etc.

>> B. Lottery Funds

>>> - A competitive application process for additional funds for professional development

>>> - Funds are allotted by an annually selected committee who distribute the limited funds on a "needs" basis in accordance with the criteria set by the Cal State system.

>> C. Other Funds

>>> - Various other potential sources of funds also exist, such as the Junior Faculty Career Development Grants, but often only a small number of them are available, and only to select subgroups within the Faculty/Staff population.

>>> - Individuals have also appealed directly to their supervisors for funding, which may sometimes be supplied from the latter's discretionary funds.

C. DISCUSSION GROUP RESPONSES

A total of five sessions were held between 9/19 and 10/4/2006. Some responses were received by email. Comments unrelated to training and responses not addressing the discussion questions have been omitted in this document but have been passed on to the appropriate administrators for review and consideration.

Note: Although not a training or professional development need per se, merger-related issues arose with some frequency in discussions of training and professional development. For example, some personnel feel they are struggling to maintain a unique university identity within the merged Library. The likelihood that such issues will continue to surface in this context suggests that providing a dedicated outlet, such as a series of workshops or a forum to discuss and perhaps mitigate the concerns, may help pave the way for more productive training and development interactions.

Discussion Group Questions

1. The library is a large, complex organization. The volume of information that is important for all staff to know is substantial and changes frequently. What new ideas might you have for new staff orientation?

2. How can we **improve ongoing training** for staff?

3. How can the library's training and professional program support your ability to **share** information from your **learning experiences** (e.g., workshops, conferences, classes) with coworkers?

4. What are some of the best ways you can recommend for developing a **training system** for learning **new technologies**?

5. Everyone in the library contributes directly or indirectly to public service. What are some ways to help **enhance our service culture** through training or professional development?

6. What training or professional development opportunities do you need from the library to be **successful** in your **current position**?

7. How can the library's training and professional development program help you achieve your **career goals**?

Question 1.

The library is a large, complex organization. The volume of information that is important for all staff to know is substantial and changes frequently. What new ideas might you have for **new staff orientation**?

- Teach the Library website – it's overwhelming.
- Need free time to explore the site – time designated to do this.
- Teach the staff Intranet, too.

- Problem: When staff members are hired into a department they only get to know only that department – need to know how it function in relation to the entire organization. Need to know what other people and departments do.

- Problem: When staff members are hired they are introduced in an inconsistent fashion. They need to be introduced to each department.

- Need a Physical Tour of the building, the offices in the building with information about what the job functions are for each employee.

- The Open houses help a little, but they don't necessarily coincide with new staff orientation.

- Need "pictures" and the name & title of people attached to the front of their cubes and offices. Some way to get to know about other library departments; getting a feel for the 'whole' library. (shadowing in other departments)

- Tours and open houses helpful.

- More communication would be good.

- Training on different aspects of intranet.

- Training of managers on what [topics] is covered by university HR vs. what coverage is expected of library managers/library HR. And what is expected of each department. Make sure that these are aligned.

- Need a new staff orientation just for the library [similar to required orientation by campus HR, but specifically for the library]

- New employees need to know the history and specifics of the merger – the "merged" aspects that are a part of working here, i.e. pay inequities, different employers, etc.

- There is so much information, maybe a tour might be needed for each area (possibly virtual?? –WS)

- There should be two separate tracks for orientation – one for those who already have library experience, and one for those who don't. [full orientation may waste time of those w/experience, whereas brief orientation may not be enough for someone who has never worked in a library environment, i.e., may not even know what Tech Svcs means]

- Also, employee background differences regarding type of library (academic or public) may need to be addressed

- Provide orientation to the Intranet and Databases if people want it

- Provide a list of resources -- a booklet? – with some explanation, i.e. a "MapQuest of Services"

- A map for employees showing departments and services

- Clarify employee's library benefits (i.e. extended checkout privileges, etc.)

- Organize opportunities to shadow coworkers in all different departments.

- Build in time for new workers to learn, explore the website, etc. Some individuals learn best on their own (rather than in a class atmosphere). New faculty and

classified staff should be given time to review and practice what they've learned on their own.

- Establish a buddy system, so new people have a particular individual to go to for assistance, advice, etc.
- Put the photos of all faculty and staff on the intranet, with information on what each person does in the library. This will help everyone learn who is who, and also who to go to for particular things.
- Put out "nuts & bolts" procedures that worker can refer to when they need to know how to go about doing a particular thing.
- Hold a "new person orientation". This might actually be an on-going thing, tied in to the deadline calendar, to help new workers deal with the getting tasks done when required.
- Build in time for workers to get together.
- New staff need to receive orientation on culture, values, big picture of Library – including merger, tours, introductions
- Exit interviews are important
- Orientations should also happen at the unit level
- Implement a buddy system and new staff lunches
- Everyone needs an understanding of what all classifications of staff, faculty, managers, and student assistants do and what are some of the requirement of the positions
- Welcome event for new employees. Is it possible to close the Library for the event?
- [NAME OMITTED] had put together a new employee manual a few months ago. They could get a copy of that-it had lots of information that a new employee might not know where to look for. I was thinking it might be a good idea to put in on the Intranet.
- New staff orientations can be catch as catch can if done at the department level. When I bring new staff around to meet other staff - usually half of the people I want them to meet are not there. It might be useful to have new employees grouped and then have all of them meet at least with the different departments as a group.
- It would be useful to set up a mentoring program for new employees as well. Perhaps someone from a different department could mentor them in the ways of the system. This could encourage some inter departmental involvement which is always good.

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Question 2.

How can we **improve ongoing training** for staff?

- Have bi-monthly programs and let everyone have a calendar of programs being offered, so they can plan ahead.

- I think it might be a good idea to send out periodic notices of what is available. This happens but not in a formalized sense. I have attached a list of training providers that I put together for my own use. I think a lot of time people just don't know where to look, don't have the time, etc. I also think peer to peer training can be very effective.

- Create a library position responsible for ongoing training – Professional Trainer

- Bring everyone up to speed on Library resources

- A professional trainer would know how to present trainings and be able to train the trainers

- Build in time and support for training

- Need a Budget!

- Don't assume that everyone learns the same way. For example, some people may learn better by sitting down and reading a manual rather than attending a class.

- Have defined goals for all training.

- Hire or designate a Training Coordinator to help centralize all training information and opportunities.

- Build in the use of new knowledge.

- Have a website list of "experts" in particular databases, subjects, etc., so workers know who to go to for assistance.

- Be aware of when training is scheduled. Scheduling training during busy periods or when particular deadlines are approaching is a sure way to guarantee low attendance.

- There needs to be better communication about events, training, etc. Although some things are sent out through email, notification of many events, training, etc., are not and it is left to the individual to find out about them.

- Offer training in more than one format. For example, video tape a presentation so those that cannot attend can watch the training at a different time.

- Be more pro-active in arranging training.

- Make sure that Administration supports us in using what we learned. If we need a particular kind of software to do something we've learned, make sure it is made available, etc.

- Need a resource (list?) to know what training is out there

- Need to know about training opportunities for both "in-house" and "out-of-house"

- HR should sort and post various trainings (i.e., for specific library trainings, post for library)

- Hard to locate specific training / training for detailed processes

- The City of San Jose has a "Training Department" that SJPL employees can utilize
- Some managers forward training information better than others
- More training [period].
- Training to stay informed in your position.
- Training to expand [vision] of library.
- Training to advance within hierarchy.
- Maintaining proficiency in systems (such as PeopleSoft).
- Vendor demonstrations useful.
- Ways to decrease (or make more cost effective) expensive training or other activities requiring financial support such as presentations, sharing insights.
- It needs ongoing funding yearly; things change yearly; needs to be continuous. We need to be able to plan up to 3 years in advance for future training needs (based on job descriptions).
- Would be nice if the grant writer could help employees with grant proposals for training.
- It really Has to be considered a PRIORITY by Admin and endorsed and supported as such. It is not presently ongoing.
- Needs to be regular.
- Professional development needs to be ongoing. We need better communication to explain about the $300.00 allotment changing; we need to know what is happening to the money!
- Look at training on an annual basis.
- Need to identify training needs for the staff member before their position changes.
- Professional development should be written in the job description.
- Need training that leads to advancement! Need a outlined plan of how it might be possible to move from one position into another.
- Need help in knowing how to get reclassified.
- "Clarified" statement of training goals needs to be part of the annual review. The staff member needs an opportunity to say what you they would like in the way of training, classes they'd like to take and have that added to the review.
- Need money to purchase books to self-train.
- Training needs to be timely.

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Question 3.

How can the library's training and professional program support your ability to **share** information from your **learning experiences** (e.g., workshops, conferences, classes) with coworkers?

- Establish a Blog where staff can report on workshops and conferences they attended.

- Share general info in an informal setting (Perhaps a brown bag? Or, something like the librarians' Research Forum). It should then be considered part of professional development.

- Put notes/slides [from experience] on intranet in 'training' area.

- Presenters at external conferences have in-house presentations (eg Research Forums).

- Have 'partners' [eg teams of two people from unit] go to same training for mutual support.

- Use 'train-the-trainer' model as appropriate.

- Have designated 'experts' who can assist others in unit.

- [Create] way to request information or presentation from someone who has had a relevant experience.

- Report on conferences at department meeting, brown-bag sessions, etc., on work time

- When attending as a group, staff could collaborate on report

- Post reports/presentations on the Intranet, with links.

- Establish a reporting "template" to help create and share findings

- Use Blogs for sharing/reporting

- If sharing info by email, use care and word subject lines clearly– email overload

- Have a place on the Intranet for "Conference Info"

- If money is given to an individual to attend a conference, training, etc., the attendee should give some kind of presentation on it to share what they've learned. This might be done through a newsletter, or a conference website or blog.

- Send email or other notification of up-coming conferences, etc.

- A Training Coordinator could organize this information, posting and updating the information as needed. Again, this could be coordinated with a deadline calendar on a conference website.

- To make sure this is done consistently, this task should be the responsibility of a single individual (i.e., the Training Coordinator).

- When training is requested, note who else might benefit from hearing a report of the experience

- Training blog and RSS feed to report experiences

- Research Forum – open to all Library staff and faculty

- Emails to library list on upcoming events

- Needs to be a requirement to report results of all trainings

- Some time of email newsletter might be of interest.

- When the library funds someone to go to a conference, have the person give a formal or informal presentation on what was learned.

Question 4.

What are some of the best ways you can recommend for developing a **training system** for learning **new technologies**?

- Have regular programs on new technologies. The ITAG virtual services taskforce could present their findings in an open forum on a regular basis.
- We are working on this very question in the Virtual Services task group. We want to do the Library 23 things system http://plcmcl2-things.blogspot.com/#23 which has worked very successfully all over the country. This VT group is a combination SJPL/SJSU group.
- Technology Forums – target people to get the training and then share it with all staff
- Develop a system whereby people who need the training will get it – perhaps a training coordinator could do this
- Calendar for technologies that are coming and rate them as
    - Must have
    - Good to have
    - Maybe later
- We must insure that our electronic resources are secure, yet responsive to the needs of the staff.
- Perhaps IT should be the leaders in bringing new technology into the Library, rather than the staff.
- IT staff and librarians might cross-train, so each has first-hand experience on both sides of the problem.
- We should identify advanced libraries and send people to observe and learn from them. We are in a cutting-edge building, but behind in technology.
- To address the need, we need to find out what's missing – need a repository for questions and have someone assigned to monitor that
- Could have a "Training Department" – Campus HR doesn't focus on new technologies
- We need people/team/group to gather info on training needs and report/request that training from campus providers (could use "Experts Database" maybe?)
- What specific needs does the library have that could be met by campus training?
- Identify and utilize online training opportunities
- Online courses may be especially beneficial for specialized/detailed training
- Need to make sure that technology and time is available to use after training, not delayed (good manual, too)

- Online tutorials available from outside the library/university [network].
- Trainings held in the library. [Have university HR trainings specifically for library groups]
- Opportunities for different learning styles (eg 1:1).
- Take a look at the "Learning 2.0" model done by a public library; staff can take and do several training modules.
- Need time to complete training modules in a designated space and time, somewhere NOT in staff member's own cube, but a different location. Supervisors need to support this time and training. It must be built into the job.
- A better way to figure out what training is available everywhere (e.g., the Center for Faculty Development, HR, InfoPeople,…)
- Put a package together of all training available.
- Establish "One place" to put information on training attended on the intranet – Bulletin Board AND it needs to be more visible.

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Question 5.

Everyone in the library contributes directly or indirectly to public service. What are some ways to help **enhance our service culture** through training or professional development?

- We need to know the website thoroughly.
- People who don't work at a public service desk need to "see" what it's like (and vice versa).
- New factors/problems/changes: scope of work, size of building
- Put Ideas into a grab bag. Have management pick an issue out and discuss it with staff. Someone outside the library should facilitate this.
- We need frequently repeated training on dealing with generation gaps, mentally ill, cultural differences. Since the merge, everything is an unknown; staff feel powerless.
- Need "clarity" on how to deal with patrons/customers: city vs. university deal with these situations differently.
- Ongoing training on dealing with patrons.
- Basic communication in other languages (eg Vietnamese, Spanish) and awareness of other cultures.
- More training on expectations of support staff including student assistants and librarians. [possible to have groups discuss expectations together]
- Educating customers to do self-service
- Not enough staff to serve all without lines, so self-service is necessary – make self-service options better known to users
- Since some staff don't do public service, they may lack the "big picture" or idea of how their work impacts public service, what their role is – staff could

tour/shadow staff from other side (public service staff vs behind the scenes staff) to learn the bigger picture; could help better functioning overall

- Provide more useful information for library tours – show public what they can do for self-service, show them behind-the-scenes views of the operation
- Staff-to-staff and Dept-to-dept training and communication would help accuracy
- Basic instruction/resource for library contacts to help ANY staff provide on-the-spot customer service (ie, patron reports facilities problem/copier jam/security emergency to an employee who just happened by – they need to know who to call and provide service, even if they don't work in "customer service")
- It would be useful to assess our reference skills, perhaps through the use of "mystery shoppers".
- Invite Technical Service workers to observe and/or assist in the classroom to give them experience in a part of librarian work which goes generally unnoticed.
- Also have them do the same at the Reference Desk, so they can see the practical results of their work.
- Have some sort of feedback form at service points so that patrons can relate their experience.
- Try to achieve "one point service" to avoid sending patrons from place to place.
- Self-assessment – give a boilerplate to help with self-assessment
- Training in quality improvements
- Buddy system at service desks
- Co-teaching
- I think though that many in the library tend to forget that our users are the reason we are here.
- Their should be customer service training offered by our human resources department.

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Question 6.

What training or professional development opportunities do you need from the library to be **successful** in your **current position**?

- Fund attendance [at] management trainings offered by CSU chancellor's office.
- I am looking for information on marketing training.
- Supervisor/Work lead training for staff who are not yet in these positions
- Provide support (money and time) for people to be successful in current positions
- Reward a job well-done with training/professional development opportunities
- Need someone to coordinate training opportunities.
- Require money and continued mentoring.
- Library should secure up-to-date equipment.

- Workers need more time to take advantage of training opportunities and to practice what they've learned.
- Care should be taken to see that training is scheduled at times when people can attend (not in September or at other busy periods, or when major deadlines are approaching).
- Training should be tied into the Library's Strategic Plan.
- Need a customized approach to meet individual needs & unique duties
- "Campus "Experts Database" would be better if also focused on and included staff, which it now does not
- More financial support for conference attendance.
- Training to specifically address items in job description (rather than just trying to learn on your own).
- IT needs more. They are always playing catch-up with training.
- Need ongoing opportunities. It needs to be considered a priority.
- We need a Person in Administration actually gathering training information. We need a conduit to the staff.
- Need opportunities for training and professional development directly related to very specific duties (often, department or job description specific).
- Communication about each others jobs. Need to improve + training being attended.

Question 7.

How can the library's training and professional development program help you achieve your **career goals**?

- We need $ and time to attend to career goals. We need to see or know ways to move up in the organization
- Pre-evaluation worksheet helps to discuss goals with supervisor. But this is dependent upon having a good manager.
- Manager/supervisor needs to acknowledgement the staff member's career goals. This should be more than conversation.
- Supervisors – what can they do? Tell admin.
- Career goals should be broader and written to provide staff to move on (elsewhere).
- Admin needs to be more supportive. In the past staff were told that the library was never meant as a career for them, that they were just staff. However, people do stay and are invested in the library. Staff do consider their library jobs as a career choice.
- Managers need training within a unit.
- Training for advancement or re-classification.

- Implement CSUEU professional development language in contract in library context.
- Have a career counselor (model, mentor); assistance in identifying a career path. Possibly part of role of manager, especially as related to performance evaluation. Include student assistants.
- Have a "Career Center" for staff (similar to one for students)
- Increase support from supervisors to allow staff to take fee waiver courses –make it more available to all [not all employees are being allowed to take advantage of the benefit due to scheduling challenges or unwilling boss]
- Make sure that adequate funds are available to pay for training and professional development needs.
- Everyone needs to have a better understanding of what the professional Development and training program can do for them.
- Such a program could help workers focus on what their career goals are.
- Identify and assist people who are interested in advancement to get management training, etc.
- Organize management mentoring and training to prepare people for mid-level management positions
- Development of individual career/development plan
- Fee waiver program
- Career development workshops
- I think training in general is good for my morale and sense of accomplishment. I feel like I am a better employee and have more to offer.
- Fee waiver.

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D. SPECIFIC RECOMMENDATIONS FOR TRAINING STUDENT ASSISTANTS AND THEIR SUPERVISORS

o Because most training of student assistants is conducted by their supervisors, development of supervisors' leadership, instructional, and mentoring capacities should be considered a priority.

o Update the current student assistant manual, and post it on the Intranet. Check for changes and update the manual at least once per semester.

o Create a library-specific new student assistant checklist, and post it on the Intranet.

o Each unit should develop its own student assistant training plan and procedures if one does not exist. Have the LPD Specialist work with units and student assistant supervisors on developing or refining student assistant training programs.

o Student assistant supervisors should meet periodically to confer about their training programs, to share ideas, and to improve inter-unit consistency.

E. PROPOSAL EVALUATION PROCESS FOR STAFF

The following is a suggested process for evaluating staff professional development proposals.

Proposals will be submitted to applicants' unit heads. Each proposal will be evaluated on the basis of the following:

- o *Adherence* to requested format.

  - Proposals out of compliance with instructions may be returned to the applicants for revision or given lower priority over those in compliance.

- o *Relevance* to library's goals or growth as a library employee. Whether it meets one or both of the following criteria:

  - Supports one or more of the University Library's strategic goals and/or the performance or enhancement of library functions.

  - Supports the individual's professional growth as a University Library employee.

When funds are insufficient to support all proposals, the criteria below may be included.

- o The *degree* of relevance to the University Library's strategic goals and/or the performance or enhancement of library functions and/or the individual's professional growth as a University Library employee.

  - Proposals with a greater degree of relevance may be given higher priority.

- o *Recency* of receipt of discretionary funding.

  - Higher priority is given to applicants who have not received funding in the previous cycle(s).

    - Applicants who have not received funding in previous cycle(s) remain at the top of the list for consideration while applicants who received funding go to the end.

- o Unit priorities, such as timeliness of a proposed activity.

Applicants should be made aware that partial funding, zero funding with release time, and zero funding without release time are all possible results of the discretionary proposal process. Applicants may need to be reminded that release time—even in the absence of specific monies for training—represents a significant financial investment by the library in the individual receiving the release time.

We recommend two primary submission cycles, the first prior to the commencement of each new fiscal year and the second in the middle of the fiscal year. Funds should be allocated and reserved such that a pool of money exists for both cycles.

Priority will be given to proposals submitted by specified submission date for the cycle. Proposals submitted after the submission date will be evaluated if funds remain or become available.

Unit heads should be prepared to provide each applicant with a rationale for the funding decision. Applicants should be made aware that they may request constructive feedback. In the event of a substantive disagreement over a funding decision, the applicant may appeal to the Associate Dean or Dean.

F. LIBRARY PERSONNEL DEVELOPMENT SPECIALIST'S DRAFT JOB DESCRIPTION

Job Announcement

Working Title: Library Personnel Development Specialist

The Library Personnel Development Specialist (LPDS) is responsible for planning, organizing, and directing a wide range of training and professional development activities. The LPDS responds to both administrative and personnel requests. Consults with supervisors regarding training for performance improvement needs, conducts orientation sessions, and, where indicated, arranges on-the-job training for new employees. The LPDS helps all employees maintain and improve their job skills. Helps supervisors improve their interpersonal skills in order to deal effectively with employees. The LPDS may work with a unit supervisor to create individualized training plans for an employee to improve existing skills or acquire new ones. Ideally, the LPDS would set up a leadership or executive development program to develop leaders to replace those leaving the organization as part of a succession plan. The LPDS will establish a program to keep employees abreast of technological changes.

Planning and program development is an essential part of the Library Personnel Development Specialist's job. In order to identify and assess training needs within the library, the LPDS may confer with department/unit heads and supervisors or conduct surveys. The LPDS is responsible for evaluating the training's effectiveness to ensure that the training employees receive, helps the library meet its strategic goals and achieves results.

The LPDS must be an excellent and experienced trainer or instructor. Training methods may include on-the-job training, classroom training, and electronic learning. Electronic learning may involve interactive Internet-based training, multimedia programs, distance learning, satellite training, other computer-aided instructional technologies, videos, simulators, conferences, and workshops.

*Job Description adapted from the *Occupational Outlook Handbook*

http://0-www.bls.gov.mill1.sjlibrary.org/oco/

Potential Tasks for the Library Personnel Development Specialist**

- Develop a training and professional development plan that:
    o Educates library personnel about various benefits of the Library professional development and training program (perhaps a newsletter, webpage,…)
    o Identifies training opportunities that may lead to advancement and/or reclassification (such as a lead or supervisor's track).
    o Includes facilitation of retraining individuals whose job responsibilities change significantly.
    o Helps individuals develop a career and/or professional development plan.
    o Facilitate and assist in scheduling personnel training. Field questions about training needed, monitor training attendance, set-up subsequent training sessions for new library personnel, personnel requesting/requiring a brush-up, and personnel unable to attend pertinent training sessions.

- Publish an annual report (and post on the intranet).
- Define and state goals for training opportunities based on the strategic plan.
- Identify advanced libraries, and investigate opportunities for library personnel to observe or collaborate.
- Prioritize general training needs.
- Serves as a resource for unit heads.
- Create and maintain a centralized location for library personnel development issues, such as the following:

    Physical Resources:

    - Library Personnel Development Lab: a drop-in and appointment facility complete with reference materials.
    - Promote awareness of career counseling services.

    Electronic Resources:

    - Database of "library experts" on, software applications, subjects, electronic databases… (include campus experts) that staff can consult for assistance, or that can be called upon to teach training sessions.
    - Training and development calendar with deadlines (that automatically emails opportunities to library personnel) consulting the public library training calendar.
    - Database of "Reviewed" training and development opportunities (workshops, conferences,…) rated by the staff that attended (would include submissions of handouts, power point presentations, and materials collected from workshops).
    - Papers, poster sessions, and power point presentations written/given by library personnel.
    - Resource list of in house and outside (campus workshops, InfoPeople, library association-sponsored,…) training and professional development opportunities.
    - Note: The electronic resources listed above should be accessible through the Staff Intranet.

- Regarding Lottery Grant procedures, the LPD Specialist should facilitate compliance with all applicable policies and guidelines including:

    o Staying abreast of changes and providing current information to applicants and the Lottery Grant Committee regarding policies and the university's instructional mission.
    o Publishing a list of awardees and their award amounts.
    o Maintaining a file of proposals, awards, and rationales.

** Adapted from the Staff Brainstorming Sessions conducted in October 2006.

G. SELECTED RESOURCES

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