

# Coordinating Continuing Education for Libraries and Cultural Institutions



A report from the CE Summit hosted by IMLS and OCLC  
June 6, 2013 - Crystal City, VA



## Introduction

In June 2013, IMLS and OCLC brought together influencers from across the nation to discuss mutual interest in continuing education (CE) for library and cultural institution staff. Participants came from a wide range of organizational backgrounds, and were selected for their ability to represent CE needs and activities at a national scale.

For the purpose of the discussion and this report, “continuing education” refers to all professional development activities—from informal, self-directed learning to formal training programs—delivered through a variety of methods and formats.

The goals for the meeting were to

- **share current knowledge** of existing and emerging CE needs in the United States
- **discuss strategies and activities** of organizations that influence or offer continuing education nationally
- **generate ideas** for how to coordinate efforts and foster collaboration.

In hosting the event, IMLS and OCLC aimed to jump-start coordinated, near-term plans for innovative projects and partnerships. An outcome of the summit was a shared understanding of organizational priorities toward improvement of the impact and sustainability of CE for the field. Further, participants came away from the event with a clear sense that they could work in cooperation to more effectively meet their own institution’s goals while also advancing the goals of CE overall.

## Participants

In initially formulating participation for the summit, IMLS sought strong representation from members of the library and cultural institution profession, as well as subject matter experts in the education space. The purpose was to draw on leadership perspectives across organization size, type, and audience, in order to exchange ideas and brainstorm on possible CE futures.

Twenty-two individuals were invited by IMLS, in consultation with OCLC, to attend the convening. These individuals were selected because they collectively represented a broad range of organization backgrounds, geographies, and roles.

The invitees who attended the convening include (in alphabetical order by last name):

- Anne Craig, Director, Illinois State Library
- Carol Desch, Coordinator of Statewide Library Services and Director of Library Development, New York State Library; current Past-President of ASCLA and current Past-Chair of the ASCLA Library Consultants Interest Group
- Brenda Hough, Independent Library Consultant, ALA LearnRT and TechSoup for Libraries
- Kristen Laise, Vice President, Collections Care Programs, Heritage Preservation
- Barb Macikas, Executive Director, Public Library Association
- Nancy McGovern, Head, Curation and Preservation Services, MIT Libraries
- Mark Puente, Director of Diversity and Leadership Programs, Association of Research Libraries
- Katherine Skinner, Executive Director, Educopia Institute
- Sharon Streams, Senior Program Manager, WebJunction (OCLC)
- Joseph Thompson, Associate Director, Western Maryland Regional Library; President-Elect, Reference and User Services Association (RUSA); Chair, Maryland's Library Associate Training Institute (LATI) Oversight Committee
- Jay Turner, Director of Continuing Education and Training, Georgia Public Library Service
- Beth Yoke, Executive Director, Young Adult Library Services Association (YALSA)

The following individuals were invited but were unable to attend the in-person session:

- Eileen Abels, Associate Dean for Academic Affairs and Professor at the iSchool at Drexel, the College of Information Science and Technology; President, Association for Library and Information Science Education (ALISE)
- Steven Bell, Associate University Librarian for Research and Instructional Services, Temple University; President, Association for College & Research Libraries (ACRL)
- Sarah Chesemore, Consultant
- Solveig De Sutter, Education Director, Society of American Archivists (Chicago)
- Jessica Dorr, Deputy Director, Global Libraries, Bill & Melinda Gates Foundation
- Susan Feller, President/CEO, Governing Board, Association of Tribal Archives, Libraries, and Museums (ATALM); Development Officer, Oklahoma Department of Libraries
- Amy Gipson, Program Officer, Global Libraries, Bill & Melinda Gates Foundation
- Holly Hinman, Director, Infopeople
- Jamie Markus, Library Development Manager, Wyoming State Library
- Lynn McDonald, FEDLINK Network Coordinator, Library of Congress
- Sharon Morris, Director of Library Development, Colorado State Library

IMLS was represented by Director Susan Hildreth, Associate Deputy Directors Robert Horton and Laurie Brooks, Deputy Director Maura Marx, and Senior Program Officer Timothy Owens. Chrystie Hill, OCLC Director of Community Relations, served as facilitator for the session.

## Pre-Meeting Information Sharing

A Basecamp site was set up by the organizers to share information and host discussions among the invitees in advance of the meeting. All invitees were asked to prepare and share a profile with the group that answered the following questions:

- What CE-related services or programs are offered by your organization?
- What target audiences do you serve?
- Based on your experience, what are the current and most important needs of these target audiences?
- What are you doing well? What are your CE strengths?
- What could you do better? What are your CE weaknesses/challenges?
- What are your strategic priorities in regards to CE?
- How are your programs and services funded? Are these funds sustainable?
- What are your key partnerships in delivering your CE services and programs?
- What would you like to achieve through this meeting?

The responses to several of these questions were then aggregated and used as discussion material at the in-person session. Participants were also asked to review the profiles and additional background information supplied by OCLC and IMLS in preparation for the convening. [Please see the [Appendixes](#) for individual participant profiles, aggregated responses, and selections from the pre-reading.]

## Meeting Discussion

IMLS Director Susan Hildreth welcomed meeting participants and shared that IMLS had been considering their investments in continuing education, and wanted to answer, through their own market analysis, a few key questions:

- How are LSTA Grants to States and Laura Bush 21<sup>st</sup> Century Librarian Program grant funds spent in regards to continuing education?
- How many professors and master's degree students does the field need in the next few years?
- What are the additional needs, outside of formal library and information science education programs?
- Are there gaps we could fill and partners we could work with to develop the CE ecosystem for librarians and cultural institution staff?

Hildreth remarked that library and cultural institution staff “need to be flexible and creative and adapt to the myriad opportunities that are out there, and we need to help them.” She added that some sources of funding for continuing education had been reduced in recent years, and that made it even more critical that we work together. “We are not coming here with an agenda,” she concluded, “we are here to listen, and learn.” Although event participants represented a broad range of backgrounds and institutions, Hildreth indicated that the conversation should quickly expand to all those who can influence CE nationally.

The summit facilitator then kicked off the convening with introductions and two framing questions for the day.

## What is the purpose or goal of continuing education?

Drawing on discussions already started in Basecamp, the group conversation began by identifying shared or diverging perspectives on the goal and purpose of continuing education.

Participants identified the following as key goals for continuing education:

- To guide learners to an “aha” moment; to both “inform” but also to “transform”
- To motivate and build the competencies of the library and cultural institution workforce
- To identify trends and issues, from global to local, that are relevant to changing needs
- To develop expertise for “new roles and new times”
- To develop and support the learning organization, as well as individual learners
- To transfer knowledge across domains; align practices and build networks; find a common core
- To meet user needs; to successfully address the needs of the public we serve.

Participants also noted that, although many found goals and purpose statements to be the same, certification programs varied widely, and there was a gross duplication of effort, even beyond library domains. The group then immediately expressed the desire to “do CE better” by training on specific competencies and across multiple formats. “We need tools,” said one participant, “and a foundation, to both learn and teach well.”

## What are the priority challenges faced in delivering CE nationally?

Drawing upon the list of aggregated responses to the question of organization challenges asked in invitee profiles [[See Appendix B](#)], participants were asked to identify the most significant barriers in delivering CE.

**Learner challenges** included limited time, resources, funding or organizational support; a need for deep and broad learning; difficulty keeping up with the pace of new learning trends and topics; and difficulty becoming or remaining motivated as a lifelong learner.

Key challenges for **administrators** included their limited resources to support learning, and lack of clarity around where the responsibility for enforcement of learning policies lies.

**Providers of CE** have their own challenges, including sustainability and funding; a looming question about how to engage MLIS programs in CE; varying levels of buy-in to changing from the status quo; and inconsistent standards for CE delivery, with no mechanism to regulate practices.

Even at this early point in the convening, participants conveyed a strong sense that their local work could benefit from broader engagement with others supporting CE nationally. Additional discussion followed in related categories.

## What are your first impressions of what CE providers should do next?

Based on the significant pre-reading, all participants were asked to share their initial ideas for practical strategies that should be considered by the group. These were:

**Understand the models, tools, and formats.** First, it was acknowledged that different delivery mechanisms for CE may be appropriate for different learner audiences or to achieve different outcomes. It was recommended that

CE influencers look to understand which models and formats work best for different typical situations, such as “just-in-time” learning and webinars, versus in-person, versus blended learning. Solo versus group learning should also be considered.

**Focus on transformation.** Second, there is increased awareness and focus on using CE to “transform” information workers, libraries and the communities they serve. It is important to resolve how much emphasis should be placed on topic-focused training and how much on transformational skills. In addition, it was posited that community engagement can serve as an important driver for learning. For example, community needs for eHealth information will drive library staff efforts to learn in that area; but that specific topic can also serve as a springboard for broader issues, such as creating a digitally inclusive and supportive library space. A community-impact focus for CE leads to a need for evaluations that go beyond assessing learner comprehension and include tracking application of learning, and measuring impacts of the staff learning for individuals and communities then served. Staff development should ultimately translate to learning outcomes for end users, not just for staff themselves.

**Reduce duplication.** Finally, participants agreed that a greater understanding of how CE connects or could connect with iSchools is needed. Closer alignment among CE providers is also imperative to reduce the duplication of effort that is keenly recognized in the creation and implementation of CE.

Participants then turned their attention to the need for broad and inclusive communication with all those in a position to influence and contribute to CE nationally, and felt strongly that this starting conversation should be continued amongst a broader group. Participants also cautioned that action will nonetheless need to be specific and focused. They suggested that a “coalition” of leaders or groups could be charged to settle on standards; some suggested researching other industries for how certification is embedded in those communities. Finally, it was recommended that a network of expert trainers could be established and supported.

## Target Audiences and Their Needs

Because the convening group supports a broad range of target audiences in their organizational CE efforts [\[See Appendix B\]](#), it was important for the group to select a set of core audiences on which to focus the discussion. Participants prioritized five types of learners and then identified the key learning needs of each.

### 1. CE Providers

The needs of organizations and individuals who provide CE, either by creating, managing the creation, or delivering CE, fell into the thematic areas of quality, resources, format, and sustainability.

**Quality:** certification program or other recognized credentials for trainers; assessment or evaluation of pedagogies, curricula, and delivery/format; and templates, best practices, and ingredients for successful learning experiences.

**Resources:** sharing the best practices, templates, curricula; as well as professional networking, and access to mentors and experts.

**Format:** support for the transition from face-to-face training to virtual and more self-guided learning.

**Sustainability:** business models that move beyond cost recovery and discover how to offer affordable CE to high-need audiences with limited budgets.

## 2. Emerging Professionals

The primary needs for those who are just entering the information management field, no matter their role or organization type, are to grow their knowledge and leadership skills, and to find effective support for their continuous learning. The discussion deliberately stressed the learning needs that went beyond basic skills and served to empower transformation of the individual and the organization.

**Grow knowledge and leadership skills:** broad-based understanding of the information management field, and community impact topics such as workforce issues; leadership skills, like team building or facilitating team dynamics, adaptability and change management, decision making, getting buy-in, advocacy; planning a career path.

**Learning support:** building professional networks and finding connections, mentors; become a self-driven learner and buy into lifelong learning; have support from leadership to learn and apply new ideas.

## 3. Library Administrators

The learning needs of library administrators are to cultivate strategic vision and to develop transformational leadership skills that fit with 21<sup>st</sup> century opportunities and realities. Meeting participants shared that the responsibilities for library administrators were changing, and put an emphasis on their need to

- Rapidly innovate, be nimble and adaptable
- Identify and respond to emerging trends
- Develop, support, and manage risk taking; cultivate innovative mindsets
- Have vision and inspire others to support that vision
- Seek new funding opportunities with courage and know-how
- Support a learning organization culture
- Develop new roles for staff (partner with emerging professionals); reconstruct the “library” for 21<sup>st</sup> century
- Develop and manage partnerships and other strategic relationships
- Advocacy, and the ability to articulate ROI, measure outcomes and impacts
- Manage budgetary considerations
- Recognize their assets; for example, knowledge, skills, resources

## 4. Library Workforce / National Information Managers

As with emerging professionals and administrators, it was asserted that the entire library workforce must have learning that focuses on the future of the information field, and that workers must have the knowledge, skills and mindset to power that evolution. It was also acknowledged that library staff need to believe there is strong organizational support for their learning, so that they feel justified in spending time on learning—that their learning outcomes will be fully supported. Library workers must also stay current on their own training and learning trends, as many will be asked to teach patrons the same skills they have only just learned themselves.

**Skill development:** how to be a risk taker and innovator; how to engage the community, advocacy; technology and other next-generation skills; leadership and management (at any level); skills for teaching patrons.

**Organizational support:** culture of learning – time, money, access, permission/support; incentives for learning; bridging the gap between MLIS and non-MLIS.

## 5. Rural Libraries

Small and rural libraries have especially limited capacity in terms of resources and budget. They contend with challenges such as limited bandwidth and lack of online tools, a small staff size, extremely constricted funds for training, and a high percentage of non-credentialed or untrained staff. Rural and small libraries can greatly benefit from connections with other organizations that have similar needs and interests to their own: keeping up with emerging technologies and trends; forming partnerships, developing support, systems and networks, or mentor relationships.

## Assets

Participants then identified assets that could be applied toward new initiatives to meet the CE needs of the audiences identified. Assets were generally identified in three areas: making use of existing networks and organizations; building on existing tools, models and content; and drawing on the expertise and innovative mindset of participants in the field.

### Networks

- Existing networks, e.g. Lyrasis
- Affinity groups, e.g. SAA
- CE professionals, e.g., ALA Learn RT, WebJunction, State CE Coordinators and CE Forum
- Communication and coordination channels, e.g. COSLA, ARSL

### Existing Tools / Models / Content

- Curriculum models, e.g. Every Child Ready to Read, Turning the Page
- Train the Trainer models, e.g. DPOE, IMLS
- Technology and formats, e.g. MOOCS, webinars
- Sharing platforms, e.g. WebJunction, DPLA
- Literacy and advocacy training content, especially for small and rural libraries, e.g., Turning the Page (PLA)
- Webinar platforms, e.g. Blackboard Collaborate, Adobe Connect, and other teaching platforms
- Scalable models
- Rapid innovation: R2Conference (Colorado State Library, I think)
- Webinar expertise, e.g. WebJunction
- National competencies/standards, e.g. Competencies Index for the Library Field (WebJunction)
- Content: DPOE, DPM, DigCCurr, etc.
- Bandwidth: Public Access Technology Community (PAT-C), Ning (COSLA)

## Expertise

- Staff and the organizations who already provide CE
- State and national association CE Programs (ALA and its divisions; State Library associations)
- Existing certification programs – which can serve as models
- State Library CE programs (COSLA, PATC, 50 State Libraries)
- Mentors (if there is a program for them)
- Learners' comfort with webinar format
- Subject matter expertise covers a wide and deep range when looked at across the CE field

## Mindset

- Interest at national level
- Culture of cultivation
- Enthusiasm and optimism ; passion and creativity
- Increased enthusiasm around online learning

## Funders

- IMLS, NEH, private foundations, etc.
- LSTA grants to states (leveraged!), IMLS LB21 grant funds

# Opportunities

Next, the group focused on the question: where should assets be applied to address the challenges identified as the most pressing? The opportunities to address CE needs were discussed, with ideas that fell into the areas of sharing resources and best practices, researching and assessing models and content, coordinating efforts and building broad buy-in for CE, and creating new learning content.

**Share:** The group asserted its belief that librarians and the rest of the field are very willing to share ideas and information with one another, and there could be more efforts made to capture that by applying expertise and web technology. Examples of how to do this include eliciting best practices regarding how organizations and individuals support learning; trainers sharing curriculum, tests and test results, guidelines; using a national, web-based platform for CE providers/coordinators to share learning content and assets; or building/expanding an online learning clearinghouse.

**Assess:** There was an expressed need to identify what is working well now and understand more fully what assets already exist that can be leveraged. Suggested activities include researching and assessing content formats and delivery modes, models for program assessment, and existing curricula and models for curricula, and evaluation methods and measurements. An inventory could be made of learning content, formats, and CE providers currently used by libraries. Through exploring the costs/benefits of formats or modes in various contexts, and through ongoing evaluation of outcomes and impacts of learning, successful programs could be identified and

then replicated. There was a specific emphasis on “find and replicate” working models for in-depth and transformative learning experiences; e.g., on leadership and risk taking.

**Coordinate:** There was a clear recognition that CE providers—including those organizations represented by the participants—have a significant opportunity, or even an imperative, to improve interagency cooperation so that duplication of effort is decreased and results are improved. This coordination will require organizations to find ways to continue the conversation around CE, build a network and gain leadership buy-in for supporting CE initiatives. Ideas for a broad national coalition and “radical collaboration” were raised during this discussion. Successful collaboration among organizations will involve building mutually beneficial partnerships and finding some points of consensus and alignment around national CE priorities.

**Create:** There are opportunities to focus the development of new learning content on topics already determined as high need in the field—such as eHealth, digital curation, and intellectual property rights in the digital environment. Other high-need topics can be determined by building on community engagement initiatives. Some of the barriers to learning access can be addressed by devising low-cost learning solutions on the part of both library workers and CE providers; pursuing partnerships among CE providers to develop new learning, and taking steps to make sure library workers have the skills and equipment they need to use online learning tools.

## Program Ideas

As a concluding exercise, participants were divided into four groups and asked to develop a proposal for a new program that would address the learning needs of one of the five primary audiences. Two groups devised programs that serve the needs of CE providers, one group focused on library administrators, and the final group on emerging professionals. These program proposals are described in brief here:

1. Blending virtual and face-to-face events, provide trainers with templates, best practices, mentoring, and tools for designing and delivering high-quality learning experiences; and help trainers build and maintain a supportive professional network. Target Audience: CE Providers.
2. Provide an online knowledge object repository that allows for storing, searching, retrieving, and reporting use of material to support the design and delivery of learning. Cross-pollination of content across institutions and organizations may result in new, innovative programs. Target Audience: CE Providers.
3. Increase investment in and support for CE by persuading association leaders, across professional boundaries, that this is a priority. Host a kickoff meeting to establish a communication mechanism would help point to the lower costs and increased benefits of collaborating and sharing resources in this area. Sustainability would be a function of redirecting and reallocating current funding to get a bigger bang for the buck. Target Audience: Library Administrators.
4. Deploy a national leadership training program targeting emerging professionals and their administrators, to cultivate mindset, skills and opportunities to transform libraries to better serve community needs. Target Audience: Emerging Professionals.

## Conclusions

Participants closed the session by returning to the “opportunities” discussion described earlier in this document. Individuals shared personal reflections on the day, their colleagues’ contributions, and any personal commitments to next steps. Throughout these final reflections, themes appeared around eliminating duplication, working across boundaries, and more rigorously evaluating impacts. Participants also strongly agreed that these would be highly desirable goals for future CE programs.

IMLS encouraged participants to further engage their colleagues in the CE field, to consider the programs devised during the session and other ideas that came out of the discussion, and to formulate new proposals for the Laura Bush 21st Century grant cycles. All were encouraged to continue to share research and reading from their own scans of the field, and to spread the call to action. The group felt strongly that it was important to expand the conversation to include greater representation and one that goes beyond the library field, including graduate schools, more professional organizations (e.g. SAA, AAM), more CE representatives, other industries that have a stake in CE, more state-level representatives, advocacy and marketing allies, and the education sector.

Participants left the meeting indicating that they had been spurred to action, and were anxious to seize the opportunities identified by the convening; namely, to work in deliberate coordination across organizational boundaries to devise or strengthen CE programs that will transform the library and cultural institution workforce in ways that lead to measureable impact on our nation’s communities.

Since the convening, participants have continued to discuss and develop ideas for new programs and initiatives that strongly emphasize organizational coordination for greater efficiency and larger impact. This report is intended to build what was catalyzed by the convening by broadening the conversation, with the hope that more individuals and organizations will be inspired to pursue new proposals, partnerships, and activities that will make a positive impact on CE across the nation.

Readers interested in engaging more deeply with the work of the CE Summit group should contact **Robert Horton** at [rhorton@imls.gov](mailto:rhorton@imls.gov) or **Laurie Brooks** at [lbrooks@imls.gov](mailto:lbrooks@imls.gov).

Readers can also contact **Chrystie Hill** at [hillc@oclc.org](mailto:hillc@oclc.org) with a request to be added to the Basecamp site for continuing conversation.

# Addendum

In August 2013, members of the CE Coordinators Forum from approximately 30 states met in Portland, Maine, for a meeting that they have held annually since the 1990s. During this meeting, IMLS, represented by Timothy Owens and Bob Horton, led a session to step through the draft CE summit report and garner feedback. IMLS captured the additional or emphasized points that surfaced during this robust discussion.

## **Additional purpose or goal of CE**

- building community

## **Additional and emphasized challenges to national delivery of CE**

- infrastructure for collaboration
- staff turnover at local level and state level (both providers and recipients)
- competition rather than collaboration in CE ecosystem
- funding/paywall barrier
- real transformation (beyond just offering a class)
- varying levels of needs
- limits of CE impact
- national initiatives - rapid deployment
- organizational structure

A recurring theme was the lack of any infrastructure for formal collaboration. Efforts to do so are often challenged by the practical obstacles of governance, budgeting, allocating resources, etc. This raised the larger issue that the coordinators did not sense that CE was always the highest priority in their home institutions. They also realize that CE cannot address more systemic problems, but instead works best as part of a complementary array of actions. In sum, while the coordinators were clearly passionate about their work and are problem solvers in many ways, they were keenly aware of the challenges.

## **Additional target audiences for CE**

- trustees; volunteers
- green/new directors
- stakeholders/influencers/users

## **Additional and emphasized assets among CE providers**

- developed content
- knowledge of users
- expertise
- goodwill

- openness to new ideas
- Georgia's new GLEAN application
- Fairly good prices from some course content vendors

**Additional opportunities**

- conduct cost/benefit analysis around opportunities for collaboration and greatest impact
- standards/benchmarks at national level
- new training topics: digital literacy, technology petting zoos, ACA, maker spaces, common core standards

**Online vs. in-person learning**

There is clearly a preference among most coordinators for in-person delivery of CE, which they believe is overall more effective than an online format. Most were in agreement that some subjects in particular are better learned in person rather than in an online environment. The stated reasons for using online training were solely for practical considerations: the higher costs of in-person training, and lack of time and travel funds for library staff.

IMLS and OCLC are very appreciative of the thoughtful discussion and additional insights provided by the CE Coordinators Forum participants.

## Appendix A: Summit Participants and Profiles

Invitees, participants and hosts are listed below, in alphabetical order by last name. Individuals noted with an asterisk were unable to attend the June 6 meeting. Where profiles are available, links are provided.

Name	Title
<a href="#">Eileen Abels*</a>	Associate Dean for Academic Affairs and Professor at the iSchool at Drexel, the College of Information Science and Technology; President, Association for Library and Information Science Education (ALISE)
Steven Bell*	Associate University Librarian for Research and Instructional Services, Temple University; President, Association for College & Research Libraries (ACRL)
<a href="#">Laurie Brooks</a>	Associate Deputy Director for Library Services, IMLS
Sarah Chesemore*	Consultant
<a href="#">Anne Craig</a>	Director, Illinois State Library
<a href="#">Carol Desch</a>	Coordinator of Statewide Library Services and Director of Library Development, New York State Library; current Past-President of ASCLA and current Past-Chair of the ASCLA Library Consultants Interest Group
Solveig De Sutter*	Education Director, Society of American Archivists (Chicago)
Jessica Dorr*	Deputy Director, Global Libraries, Bill & Melinda Gates Foundation
Susan Feller*	President/CEO, Governing Board, Association of Tribal Archives, Libraries, and Museums (ATALM); Development Officer, Oklahoma Department of Libraries
<a href="#">Amy Gipson*</a>	Program Officer, Global Libraries, Bill & Melinda Gates Foundation
<a href="#">Susan Hildreth</a>	Director, Institute of Museum and Library Services (IMLS)
<a href="#">Chrystie Hill</a>	Community Relations Director for OCLC
<a href="#">Holly Hinman*</a>	Director, Infopeople
<a href="#">Bob Horton</a>	Associate Deputy Director for Library Services, IMLS

<a href="#">Brenda Hough</a>	Independent Library Consultant, ALA LearnRT and TechSoup for Libraries
<a href="#">Kristen Laise</a>	Vice President, Collections Care Programs, Heritage Preservation
<a href="#">Barb Macikas</a>	Executive Director, Public Library Association
<a href="#">Jamie Markus*</a>	Library Development Manager, Wyoming State Library
<a href="#">Maura Marx</a>	Deputy for Libraries, IMLS
Lynn McDonald*	FEDLINK Network Coordinator, Library of Congress
<a href="#">Nancy McGovern</a>	Head, Curation and Preservation Services, MIT Libraries
Sharon Morris*	Director of Library Development, Colorado State Library
<a href="#">Mark Puente</a>	Director of Diversity and Leadership Programs, Association of Research Libraries
<a href="#">Katherine Skinner</a>	Executive Director, Educopia Institute
<a href="#">Sharon Streams</a>	Senior Program Manager, WebJunction (OCLC)
<a href="#">Joseph Thompson</a>	Associate Director, Western Maryland Regional Library; President-Elect, Reference and User Services Association (RUSA); Chair, Maryland's Library Associate Training Institute (LATI) Oversight Committee
<a href="#">Jay Turner</a>	Director of Continuing Education and Training, Georgia Public Library Service
<a href="#">Beth Yoke</a>	Executive Director, Young Adult Library Services Association (YALSA)

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## Eileen Abels

**Associate Dean for Academic Affairs and Professor at the iSchool at Drexel**, the College of Information Science and Technology. She is currently serving as President of the Association for Library and Information Science Education (ALISE).

### **CE related services or programs**

The iSchool offers several certificates (3 10-week courses) and a specialist program (each consisting of 5 courses). They are described on our website: <http://www.ischool.drexel.edu/PS/ProfessionalDevelopment>

### **Target audiences**

Currently we are serving post-Master's students with our specialist programs and post-baccalaureate certificates. We just announced a new certificate for the fall entitled Cybersecurity, Law and Policy.

### **Needs**

The librarians who enroll in our certificates are interested in updating or broadening their skills. The source of our information is the application submitted by the prospective student.

### **CE weaknesses/challenges**

By offering full certificate programs, we are not addressing some needs that could be handled with workshops or short courses.

### **Strategic priorities**

Our focus is on our full-time programs. We are considering options regarding CE.

### **Funding / Sustainability**

Since our programs are based on existing courses in our programs, they are sustained through tuition. The students taking the certificates are in the same online class as students enrolled in one of our degree programs.

### **Key partnerships**

To date, we do not have partners. However, we have begun to have conversations with the Pennsylvania State Librarian. We are also going to work with SLA to offer some workshops with our local chapter.

### **Goals for the meeting**

Learn about ways that LIS programs can help meet the 21<sup>st</sup> Century CE needs of information professionals (including librarians, archivists, etc.)

## Laurie Brooks

**Associate Deputy Director for Library Services, IMLS.** I have worked with the LSTA Grants to States Program for 10 years, five as a program officer and five as the associate deputy. It goes without saying that I have read a lot of LSTA project reports that have CE as a primary focus; the federal investment in improving the skills of library staff to better meet the needs of their users is indeed a substantial one. Prior to joining IMLS, I was a school library system director in Ithaca, NY where I coordinated staff development for 100 professional and para-professional library staff; I also worked as a school library media specialist in VT and NH; and as a public library director in ME. I look forward to joining everyone in June as we wrap our collective arms around the topic of CE!

Please see IMLS organization profile at the end of this report.

## Anne Craig

### Director, Illinois State Library

<http://www.cyberdriveillinois.com/departments/library/home.html>

Greetings one and all from Springfield, Illinois! I'm Anne Craig, director of the Illinois State Library (ISL). I work for Secretary of State Jesse White; he is our State Librarian and State Archivist. The ISL has a dual identity, established in our enabling legislation. As a library, we serve state government and elected officials, persons with disabilities, and Illinois citizens. As a government office that fosters library and literacy development we've provided \$94 million in grants this year; CE programs like ILEAD USA, On the Front Lines, and the Small Public Library Management Institute; and support services like OCLC administration. We have about 650 public, 820 school, 200 academic, and 270 special libraries that are part of our multi-type library network. I am really looking forward to exploring how we can best meet the challenges we face daily, especially ensuring that local libraries remain vibrant and relevant.

### CE related services or programs

- **ILEAD USA: Innovative Librarians Explore, Apply and Discover** is a nine-month continuing education immersion initiative to directly address the need to expand librarians' leadership abilities to use participatory technology to effectively engage constituents. This year, Colorado, Iowa, Ohio and Utah State Libraries are participating with Illinois. ILEAD USA is built on the Illinois model funded by Institute of Museum and Library Services (IMLS) that incorporates training in leadership development; needs assessment; technology; project management; and project implementation strategies. <http://www.webjunction.org/partners/illinois/il-programs/ileadusa.html>
- **On the Front Lines-the Statewide Library Practitioners' Conference** is a three-day conference for frontline staff persons with training and exposure to the latest technology tools and techniques, all designed to help them meet the needs of their communities. Keynote and concurrent sessions address topics to help frontline staff serve and engage their constituents. <http://www.cyberdriveillinois.com/departments/library/libraries/otfl.html>
- **The Small Public Library Management Institute** is held annually, as a weeklong Institute; its mission is twofold: 1) to provide public library administrators with a clear understanding of their roles and responsibilities; and 2) to provide public library administrators with the skills they need to better serve their constituents. Topics range from legal and budgeting issues to policy development, innovative programs, building safety, leadership, customer service, and personnel. Opportunities for networking, teambuilding, and informal discussions provide the platform for intensive work and professional growth. <http://www.cyberdriveillinois.com/departments/library/libraries/splmi.html>
- **Ongoing CE efforts geared towards state government employees** include a robust outreach services program. Reference staff travel statewide and conduct webinars on services for state government. The presentations focus on an overview of State Library services, remote access to databases, reference assistance and map library services.
- **The Diversity Program** has developed a number of programs for exploring topics such as what English speakers need to keep in mind when speaking to non-English speakers, and developing awareness of culture, cultural differences and tolerance.
- In addition, grant writing and grant management workshops (i.e., Literacy, Public Library Construction, and LSTA) are offered in tandem with grant offerings and awards.

### Target audiences

The mission of the Illinois State Library includes two primary target audiences: 1) State government employees;

and 2) staff from public, school, academic, special libraries, and the regional library systems as well as library administrators such as trustees from public libraries and regional library systems.

### **Needs**

- 1) Staying innovative balanced with discovering practical solutions to resolve issues and keep up with changing demographics, trends and technologies.
- 2) Loss of corporate knowledge as a result of library staff retirements and turnover results in a multiple needs. First is the need for training on basic skills. More importantly is a need for education focusing on cooperation and understanding of responsibilities (such as programs that promote sharing) that support the Illinois library network for the benefit all Illinoisans.
- 3) Training programs to improve the management skills and knowledge of library administrators are important or very important activities for 84.3% of all responders to our 2012 statewide *LSTA/Continuing Education Survey*.

### **CE strengths**

- The intentional inclusion across multi-types of libraries to bring together different perspectives from public, school, academic and special libraries. Collaboration with partnering agencies.
- Making CE offerings affordable – Use of grant funds to cover speakers' costs with a very low registration fees (or none) to cover other expenses; and with multiple day programs, offering scholarships to cover hotel costs.
- Being respectful of local travel restrictions or time constraints by using technology to offer virtual opportunities.
- Immersion strategies and multiple day CE sessions to allow time for experiential learning rather than just lectures.
- Our workshop registration site, L2, is very robust, and much loved by all Illinois library staff. It has been critical in scheduling and publicizing CE opportunities.

### **CE weaknesses/challenges**

- Illinois has such diversity in skills levels that our CE offerings are never enough to fulfill the need.
- Due to the economic downturn, the regional library systems have temporarily discontinued CE programs, creating a lack of CE opportunities.
- Inspiring participants to reach beyond their comfort levels. Changing attitudes and reaching those who don't know what they don't know, think their way is the only way, and/or won't change unless they can be encouraged to attend training.
- Communication is always a challenge. We finally have a good E-News network, reaching 6,000 subscribers weekly, but we still struggle with just getting the word out.

### **Strategic priorities**

- The Illinois State Library Strategic Plan emphasizes the investment in leadership by supporting continuous education activities for ISL and other Illinois libraries' staff.
- Illinois is a WebJunction partner, which makes available access to online courses, webinars and content at no cost to libraries statewide. This allows library staff to access information or training from their home or work computer.
- Our statewide videoconference network allows for virtual programs connecting multiple sites. This infrastructure cuts travel time by offering regional sites for people to attend statewide programs.
- We support a statewide subscription to Adobe Connect, used heavily by all libraries in the state, but especially by the academic libraries and library systems.

### **Funding / Sustainability**

- The WebJunction partnership and conferences such as On the Front Lines are funded using Illinois' Federal Library Services and Technology Act (LSTA) dollars.
- The Illinois State Library received a \$470,000 Laura Bush 21st Century Librarian Program grant from the Institute of Museum and Library Services for ILEAD USA. Future ILEADU programs will be funded with LSTA.
- State dollars have primarily supported the establishment of the videoconferencing network.
- State dollars through our office support the regional library systems.

### **Key partnerships**

Our three regional library systems, the University of Illinois Springfield, Syracuse University, and WebJunction.

### **Goals for the meeting**

How we can advance understanding of and exposure to digital literacy initiatives at the national and state levels. Also opportunities to share ideas and good speakers, and work together on collaborative programs that could be replicated across state borders.

## **Carol Desch**

**Coordinator of Statewide Library Services and Director of Library Development, New York State Library.** Also the current Past-President of ASCLA and current Past-Chair of the ASCLA Library Consultants Interest Group.  
<http://www.nysl.nysed.gov>

Carol Desch joined the staff of the New York State Library's Division of Library Development in 1984 and has served as the Coordinator of Statewide Library Services and Director of the Division of Library Development since 1996. During her tenure at the State Library, Ms. Desch has provided leadership and vision for statewide programs, policies and services designed to improve library services for 19 million New Yorkers through a comprehensive network of 73 library systems and over 7000 public, school, academic and special libraries.

### **CE related services or programs**

The State Library works in partnership with New York's 73 library systems (23 public library systems serving 756 member libraries with 1,080 library buildings, 9 reference and research library resources systems serving over 700 academic and special libraries and 41 school library systems serving over 5,000 public and non-public school libraries) to assess and meet the ongoing and ever-changing professional development needs of the 11,632 librarians, 14,620 other library staff and over 6,000 public library trustees. This extraordinary network of library systems, established and funded by the State, has as one of its major roles and mandated responsibilities the delivery of quality professional development for library staff and trustees. Through the systems, ongoing professional development is provided for staff working in all types of libraries – public, academic, school and special. In addition to the extensive offerings of the library systems, the State Library also partners with the system director statewide organizations (NYALS, PULISDO, NY3Rs and SLSA, Inc.) and with many others (such as the Gates Foundation, the New York Library Association, the Library Trustees Association of New York State, E-Rate Central, the New York Council on the Humanities, NOVELNY vendors, the 7 graduate schools etc.) to offer targeted training opportunities designed to advance strategic initiatives outlined in statewide policy documents, including the LSTA Five Year Plan.

The State Library administers a longstanding statutory public librarian certification program. Beginning with certificates issued in 2010, certificate holders are now required to obtain a minimum of 60 hours of professional development in every five year period.

Increasingly, more of the State Library's professional development offerings are delivered via webinar. We are also experimenting with video-conferencing. State Library staff also present face-to-face sessions on topics such

as Outcomes-Based Evaluation, E-Rate, Disaster-Preparedness and State Library Initiatives, Services and Programs. The State Library is partnering with others in SED in the planning for an invitational conference for 250-300 librarians, museum educators, archives and public broadcasting leaders called “ Uncommon Approaches to the Common Core” in mid-August. The State Library is also conducting a comprehensive needs assessment to determine professional development needs related to the delivery of public library early learning and literacy services.

#### **Target audiences**

- Library system leaders and staff (in particular for outreach, youth and technology services)
- Library leaders and staff (in particular topics related to laws, policies, evaluation, planning, funding, community engagement, technology, digital literacy)
- Library trustees and decision makers (basic duties and responsibilities, governance, funding)
- Libraries, archives, museums, historical societies, other non-profits with unique and rare research materials/collections

#### **Needs**

- Community Engagement Strategies (Includes lifelong learning, workforce development, literacy)
- Leadership, Planning, Evaluation
- Technology and Digital Literacy

#### **CE strengths**

We do well at infusing Outcomes Based Evaluation techniques into State Library programs and offerings. There are some great resources on our website.

#### **CE weaknesses/challenges**

We continue to strive to increase our regional, state, national partnerships with others in order to effectively assess and then meet the huge, ongoing need for professional development in our State.

#### **Strategic priorities**

The State Library’s strategic priorities for CE are aligned with New York State’s new Statewide Vision and Plan for Library Services ‘Creating the Future” and our LSTA Five Year Plan.

#### **Funding / Sustainability**

The State Library’s programs and services are currently supported with State and federal (LSTA) funds. Sources of support for the State Library have decreased significantly in the past few years. Our expectation is that both sources of funding will be constrained for the foreseeable future. While \$4 million in State Aid was restored in State FY 2013-14, state funding for the library systems is still approximately 16% below statutory levels.

#### **Key partnerships**

- Library systems
- Statewide associations/groups such as NYLA and others
- IMLS

#### **Goals for this meeting?**

Brainstorm new strategies and approaches to professional development that leverage partnerships and resources for improved results/outcomes for library staff, library users and local communities.

## Amy Gipson

### Program Officer, Global Libraries, Bill & Melinda Gates Foundation

[www.gatesfoundation.org](http://www.gatesfoundation.org)

I am currently a Program Officer on the Global Libraries team where I am a member of our Training & Leadership initiative. My work at the Bill & Melinda Gates Foundation began in 1998 as a technology trainer for West Seattle Learns, a community technology center. For the foundation's U.S. Library Program, I managed a nation-wide internship program for nearly 100 students of Library and Information Science. Previously, I was a Librarian at the Seattle Public Library focusing on Teen Services. I've also worked as a consultant for the Starbucks Foundation supporting their Youth Leadership and Literacy grant programs. In addition, I've worked as a program manager for the RealNetworks Foundation. Every day I am humbled by how much our grantees and partner organizations accomplish—and proud to be part of the Bill & Melinda Gates Foundation's efforts to strengthen public libraries and communities around the world.

### CE related services or programs

As a private foundation, we support grantees and partners in areas of shared priorities and that meet Global Libraries overall vision of ensuring that all people have access to information through technology in public libraries. We provide support to the following organizations:

- U.S.
  - OCLC (WebJunction (2002-present) and Geek the Library (2008-current))
  - COSLA (PAT Community (2011-current))
  - Edge Initiative (2011-current)
  - ALA
    - Turning the Page (2008-2012)
    - *Under Consideration*: Promise of Libraries Transforming Communities
- International
  - IFLA (Building Strong Library Associations) (2011-current)

In addition to our grant funding, we manage a limited number of projects directly that provide ongoing leadership development and training for library staff, including the following:

- International Network of Emerging Library Innovators (INELI)
- Global Libraries Work Groups (communities of practice made up primarily of our international grantees): Training, Technology, Impact Assessment, Advocacy

### Target audiences

Overall, the goal of Global Libraries is to ensure that all people, especially those in disadvantaged communities around the world, have access to information through technology in public libraries. We also target people who would not otherwise have access at home or work.

Specifically pertaining to CE, we target all public library leaders and workers at all levels (librarians and non-librarians alike). That said, our investments vary by country and are tailored to take into account the condition of library staff skills, the capacity of supporting library organizations, and the priorities of each government for individual and community development. Historically in the US we have invested a great deal in funding for direct librarian training. At this time our current focus for training is less in directly supporting librarian skill development and more in providing support to organizations involved in training and for providing these organizations with new tools and frameworks particularly with regards to innovation.

### Needs

Global Libraries solicited information and ideas from a wide range of stakeholders in the library field using an

online survey. The survey generated over 4,200 responses between Oct 2012 and Jan 2013 with a majority of responses coming from the US. Below is a summary of the most frequently provided responses to the survey questions:

- What is the role of the future library when information will be primarily accessible via a device?
  - “Trained Librarians” was cited as the most important
  - “navigating and curating information” was most frequently mentioned
- What are key attributes of future library?
  - “Trained librarians” and “Visionary, effective leadership” were rank ordered as two most important attributes
- How might support and funding from the Global Libraries Initiative most effectively help libraries develop these attributes?
  - “Collaborative efforts between/among libraries to test innovative new services and share results with field” and “Training and skills development for library workers” were both most frequently mentioned and rank ordered highest in response to this question.

### **CE strengths**

- Convening and collaboration support
- Supporting communities of practice and networks
- Sharing knowledge with the field

### **CE weaknesses/challenges**

- Sharing what we’re learning as we learn it
- Across GL and the world / bringing U.S. and International communities together
- Working together, leveraging, avoiding duplication or redundancies.

### **Strategic priorities**

Training & Leadership Initiative:

*Vision:* Public libraries and leaders are adept at bringing the benefit of information and technology into the design and delivery of library services to meet the evolving information needs of individuals and communities.

*Mission:* Identify and support high-potential training opportunities and collaborations that help library leaders and staff more quickly adopt and integrate innovative trends, tools, and services and that help create a culture of curiosity, creativity, and collaboration in support of public libraries.

Priority Areas for Training & Leadership initiative:

- Support efforts to identify, nurture and develop library leaders who are equipped to create, lead and manage high-impact libraries today and in the future. Increased attention will be given to supporting library leaders who serve low-income or marginalized communities.
- Support efforts that foster a culture of innovation, receptivity to change and risk taking within public libraries.
- Foster collaborations that strengthen the library field, share and ignite innovation, and increase efficiency.
- Engage stakeholders in creating a progressive vision of future libraries and ignite commitment to realize

### **Key partnerships**

U.S.: OCLC, ALA, COSLA, ULC, IMLS

International: IFLA, Beyond Access, national governments, International NGO’s

## Goals for the meeting

This is a wonderful opportunity to learn more about current CE efforts in the U.S., as well as future or anticipated needs, trends, projects—from key partners and stakeholders in the field. In addition, we'd like to use our presence as a way to demonstrate Global Libraries support for the CE work of our partners.

## Susan Hildreth

### Director, Institute of Museum and Library Services (IMLS)

<http://imls.gov>

I most recently served as the City Librarian of the Seattle Public Library and spent almost 30 years in California where I served as the State Librarian and worked in a number of public libraries, including San Francisco and Sacramento. Ensuring that our library workforce has the skills and competencies that they need to effectively serve the 21<sup>st</sup> century public is a high priority for me. I am very interested in what we will learn from our colleagues and, in particular, would like to identify gaps where IMLS and other partners can contribute and have an impact in moving the library/cultural heritage field forward.

### Organization profile

The mission of IMLS is to inspire libraries and museums to advance innovation, lifelong learning, and cultural and civic engagement. We provide leadership through research, policy development, and grant making. IMLS supports key issues of national concern.

### CE related services or programs

IMLS supports a wide variety of CE services and programs through our support of State Library Administrative Agencies (SLAAs), our competitive grant programs including Laura Bush 21<sup>st</sup> Century and National Leadership program and our partnerships and cooperative agreements that focus on specific topics. Several of the last are underway or under consideration, addressing eHealth, open government, immigration, workforce development, digital literacy etc.

### Target audiences

We serve a wide variety of target audiences. One of the LSTA purposes as stated in the legislation is “to enhance the skills of the current library workforce and to recruit future professionals to the field of library and information services.” Through the Laura Bush 21<sup>st</sup> Century program, our specific targets in past years have been doctoral and master’s students, particularly focused on creating a more diverse professional workforce. Within the Grants to States Program, one of the established priorities is “providing training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services.” From the knowledge we gain from our work together, we anticipate an additional focus on support of continuing education for current staff.

### Needs

- Ability to identify the needs of the community served and develop service portfolios to meet those needs.
- Ability to be flexible, identify unique opportunities, take risks, develop prototypes, test and modify quickly.
- Ability to deal with a wide variety of digital formats and effectively shift from print to digital world and all that may entail.

### CE strengths

IMLS has funds to support CE programs with wide impact. We have the ability to partner with expert

organizations and/or facilitate relationships between organizations that have complementary resources. We also have the authority and the platform to convene discussions on a wide variety of topics on a national scale.

### **CE weaknesses/challenges**

IMLS, with its limited funding, must support the greatest CE needs of our profession. We have to determine the priorities and develop the programs more quickly in a world where transformation is accelerating, opportunities are fleeting most of our audiences need “just in time” delivery of services and information. We also must ensure that our funds are being invested in activities that are effective and sustainable, with the latter especially challenging.

### **Strategic priorities**

Ensuring that IMLS-supported programs are meeting critical needs that move the field forward. Also ensuring that programs could be scaled regionally or nationally, if warranted, and with plans for sustainability.

### **Funding / Sustainability**

Primarily funds are annual federal appropriations. Some partnership activities may be supported by additional non-federal funds, including registration revenue. Project grants are provided for 2-3 years generally, with very limited options for renewal. Ongoing funding is very hard to project and the availability of funds can be affected by the federal budget cycle.

### **Key partnerships**

- COSLA/SLAAs – could be redundancies from state to state in CE efforts
- National library associations, including OCLC and ALA – redundancies in various ALA divisions/units
- Grantees – wide variety of capacity, expertise, scalability and sustainability

### **Goals for the meeting**

- Start to define sustainable CE business models
- Set some priorities: what are the practical, achievable needs across professions and associations?
- Identify CE content that can be promoted and/or re-purposed OR Defined some criteria for appraising such content
- Identify some entities with dedicated and extensible capacity for CE
- Facilitate some new (low cost?) collaborations and partnerships
- Define some possible grant proposals for short term funding
- Plan next steps to broaden the conversation and expand the partnerships

## **Chrystie Hill**

**Chrystie Hill, Community Relations Director for OCLC**, is a librarian, writer, and community-builder. In my role I get to work with private and public funders to deliver innovative programs that empower public libraries to lead their communities to a vibrant future. It's the best job ever. I'm passionate about the role that public library staff learning has in cultivating community leadership, and I'm proud to have been a part of the WebJunction program since we launched it in 2003. I'm the lead for our cooperative agreement with IMLS to host the CE summit and will be our facilitator for the day.

Please see OCLC organization profile at the end of this report.

## Holly Hinman

### Director, Infopeople

<http://infopeople.org>

I have an M.A. in Library Science from the University of Chicago and have worked in academic, special, law, and public libraries over a very long career. I was director of the Metropolitan Cooperative Library System for 12 years and subsequently served as Library Services Manager in Beverly Hills and Library Director in Burbank before starting Infopeople at the request of State Librarian Gary Strong in 1994. It has been an honor to serve as Infopeople Director as it has evolved over the years. I take special pride in the development of the Eureka Leadership Program, which in five years has produced almost two hundred incredible new leaders for California libraries.

### CE related services or programs

Infopeople is a multifaceted project that provides continuing education for California library staff; supports other LSTA and statewide library projects; plans, coordinates, and provides logistical support for special State Library events; offers various kinds of technical assistance to libraries; explores library applications of new technologies; develops and shares resources and original web content; and facilitates statewide communication among libraries. The 2013/14 learning program includes over 150 continuing education events including 37 online courses (instructor-led asynchronous, live online, and blended), over 55 live webinars, 36 podcasts, 2 self-paced tutorials, at least 26 face-to-face workshops, one virtual conference, a six-day Eureka! Leadership Institute, and a 2-day Eureka! Anniversary event. This year Infopeople will also pilot direct-to-public training in partnership with the California Preservation Project. The content of the overall training program addresses needs identified by Infopeople and the State Library through an annual assessment process. The most recent assessment indicated that areas of great need were for training in: technology; supervision/management; new service and programming models; civic engagement; services to youth, especially school readiness/early literacy and support for and work with the school system. The instability of the library workforce has created a special need for training in basic skills for all levels of employees, from library director to page.

### Target audiences

Our target audience is, broadly, anyone in the California library community, including staff in all types of libraries, volunteers, trustees, library school students, consultants, and unemployed librarians. Within that broad framework, approximately three-fourths of our audience is from the public library sector. While we design our program for California, the online courses and webinars are open to anyone and both have significant out-of-state registration. One of our recent webinars, which focused on a unique program that San Francisco Public Library has developed to serve the homeless, attracted 595 people including some from every state (including Alaska and Hawaii) and Canada. The Eureka! Leadership Program is restricted to professional librarians in California who have 10 or less years of professional experience.

### Needs

Please see above. The key sources we use to identify needs are a broad-based online survey conducted annually or semiannually, which this year was supplemented by a separate survey of California public library directors. The directors' survey revealed that 70% of California public library director are new to their positions in the last three years, and for 70% this is their first director's position. They expressed a need for leadership development and also for assistance in learning basic managerial skills such as budgeting.

### CE strengths

Both our online courses and webinars are very popular both within California and nationally. We have over 13 years of experience in delivering both.

### **CE weaknesses/challenges**

Our surveys consistently reveal that while learners have become more comfortable with online instruction, they still prefer face-to-face. We can deliver high quality face-to-face instruction, but, because of staffing and travel constraints at the local level, we can't get people to attend them. Judging from our participation in another project (the Staff Innovation Fund), the only way to overcome this challenge is to provide not only free training but also funding for substitute time and travel expenses.

### **Strategic priorities**

- To improve the quality of life of the people of California by upgrading the performance and effectiveness of California libraries
- To provide the California library community with the skills, tools, and resources needed to deliver high-quality service in a rapidly changing environment
- To develop a new generation of leaders for California libraries and the library profession
- To help California library staff become leaders in the communities they serve
- To promote libraries as a force for positive change in society.

### **Funding / Sustainability**

Mostly through LSTA, although we do charge fees for the online course and face-to-face workshops, and also search out partnerships to help pay for some of the training. Infopeople is one of the priority programs of the California State Library but probably could not continue without LSTA funding.

### **Key partnerships**

- California State Library – for funding and program development
- Other statewide projects and training partners, such as Califa, California Preservation Program, etc.
- The cadre of Eurekaans – not only are they changing communities through exciting new projects, they are transforming the California Library Association

### **Goals for the meeting**

I'm so sorry I can't attend. I look forward to any reports or follow-up from the meeting.

## **Bob Horton**

**Bob Horton, Associate Deputy Director for Library Services, IMLS**, manages the discretionary grant programs. Before this, I spent 15 (long, cold) years in Minnesota, where I was director of the library, publications and collections division of the MN Historical Society. I very much look forward to hearing more about we can all collaborate across programs, institutions, boundaries and professions to make the best use of our resources for continuing education.

Please see IMLS organization profile at the end of this report.

## Brenda Hough

### ALA's LearnRT and TechSoup for Libraries

<http://www.ala.org/learnrt/>

<http://www.techsoupforlibraries.org>

I am an independent library consultant. I am currently the Vice-President of LearnRT and will take over as President at ALA 2013 in Chicago. I also work with TechSoup for Libraries, writing content for the web and facilitating webinars.

### CE related services or programs

*ALA's Learning Round Table:* Delivers programs at national library conferences (ALA Annual, ALA Midwinter, PLA). Training Showcase at ALA Annual. Quarterly newsletter, featuring CE and training ideas.

*TechSoup for Libraries:* Gathers technology success stories from public libraries around the country and shares them in articles, a blog, and webinars. TechSoup for Libraries is actively involved in the Library Edge project, gathering and creating resources in collaboration with other members of the coalition.

### Target audiences

*ALA's Learning Round Table:* staff development and continuing education providers

*TechSoup for Libraries:* staff in public libraries

### Needs

*ALA's Learning Round Table:* networking with other staff development and CE providers, sharing resources and ideas with other staff development and CE providers, advocacy for staff development and CE

*TechSoup for Libraries:* practical ideas, resources, and inspiration (related to library technology)

### CE strengths

*ALA's Learning Round Table:* Bringing together librarians who are involved in CE and staff development at national conferences. Providing a newsletter that contains useful information targeted at these audiences.

*TechSoup for Libraries:* Sharing stories that might not otherwise be heard (great examples of both practical and inspiring technology strategies and solutions in public libraries). TechSoup for Libraries is a project of TechSoup Global, a 501(c)(3) nonprofit devoted to making technology and technology education available and affordable to nonprofits and libraries all over the world. Connection to this more broadly focused organization provides technology knowledge and resources that strengthen the library project.

### CE weaknesses/challenges

*ALA's Learning Round Table:* Provide more learning activities and networking opportunities beyond those that happen at national conferences. Need to find a better way to share resources. Would like to create a clearinghouse for resources. Some libraries struggle to produce training materials that have already been developed by someone else. Keeping it current is the big issue. Whether it is the actual resources or a list of providers, there is always the problem of currency.

### Strategic priorities

*ALA's Learning Round Table:* To promote quality CE and staff development for all library personnel. To help members network with other staff development and continuing education providers for the exchange of ideas, concerns and solutions. To serve as a source for staff development continuing education assistance, publications, materials, training and activities. To advocate for quality library staff development and continuing education at both the local and national levels.

## **Funding / Sustainability**

*ALA's Learning Round Table:* Membership dues, conference activities

*TechSoup for Libraries:* Grant funded

## **Key partnerships**

*ALA's Learning Round Table:* American Library Association, WebJunction

*TechSoup for Libraries:* TechSoup Global

## **Goals for the meeting**

*ALA's Learning Round Table:* Increased understanding of the broader picture of CE in the country and awareness of opportunities for the Learning Round Table to meet needs and make a difference.

*TechSoup for Libraries:* Increased understanding of the broader picture of CE in the country and awareness of opportunities for TechSoup for Libraries to meet needs and make a difference.

## **Kristen Laise**

### **Vice President, Collections Care Programs, Heritage Preservation**

[www.heritagepreservation.org](http://www.heritagepreservation.org), [www.connectingtocollections.org](http://www.connectingtocollections.org)

Kristen Laise is Vice President of Collections Care Programs at Heritage Preservation, a non-profit organization with a mission to preserve the nation's heritage for future generations through innovative leadership, education, and programs. She directed the Heritage Health Index ([www.heritagehealthindex.org](http://www.heritagehealthindex.org)), the first comprehensive survey on the condition of U.S. collections. In response to the findings of the survey, IMLS launched *Connecting to Collections* ([www.imls.gov/collections](http://www.imls.gov/collections)). In her capacity at Heritage Preservation, Ms. Laise has worked with IMLS on several of the *Connecting to Collections* projects that addressed the critical need for preservation training at smaller museums, libraries, and archives. In 2011, IMLS and Heritage Preservation launched the *Connecting to Collections* Online Community ([www.connectingtocollections.org](http://www.connectingtocollections.org)), a hub for collections care information and online learning. The Community now has more than 3,000 members and regularly conducts webinars and online courses that serve hundreds of participants.

### **CE related services or programs**

Heritage Preservation worked with IMLS to produce a series of *Connecting to Collections* conferences, workshops, and webinars on preservation issues that were identified by the Heritage Health Index. We also worked with IMLS to select the texts and materials to include on the *Connecting to Collections* Bookshelf that was distributed to more than 3,000 institutions nationwide and identified the websites featured on the *Connecting to Collections* Guide to Online Resources.

We are continuing this work through the *Connecting to Collections* Online Community. On the Online Community, Heritage Preservation offers monthly hour-long webinar "live chat events" with preservation experts. These webinars are free, require no pre-registration, and are designed to be an easy, drop-in learning experience where museum and library professionals hear a brief presentation by a conservator on a specific topic and can ask questions they may have. Webinars are recorded and archived on the site and we have done more than 30 to date. These events also drive people to the *Connecting to Collections* Online Community, which has a member discussion form and a library of links to trusted online information about preservation.

Heritage Preservation noticed that the *Connecting to Collections* programs served more museums and historical society staff than library and archives staff. And yet, we know from the Heritage Health Index data that public libraries, especially in smaller communities, serve as important repositories of historical collections and that they had great preservation needs. Therefore, we applied for and received a Laura Bush 21<sup>st</sup> Century Librarian grant to

develop a series of online courses to reach out specifically to libraries and archives. In 2013, we began our series of *Caring for Yesterday's Treasures—Today* courses and have held one course per month from January-May 2013. Three more courses will take place in fall 2013. Each course includes four to six, 90-minute webinars taught by a conservator or preservation librarian. Participants have the option to complete homework assignments after each webinar and if they do, they will earn a certificate of completion and digital badge. The response and level of participation has been overwhelmingly positive, with 280-385 certificates of completion being awarded for each course to date.

### **Target audiences**

Museums, historical societies, libraries, and archives that do not have a conservator or preservation librarian on staff. We are especially accommodating of institutions that have a small or all volunteer staff. Most of our participants are mid-career professionals and they range from being certified archivists or collections managers with some training and much hands-on collections care experience to individuals with no academic training in library science or museum studies. Because our programs are often the first time that our instructors have taught in an online forum, in some ways, they are a secondary audience of our projects.

### **Needs**

1. Access to free or low cost training. Heritage Preservation's current online course series is free to participants, thanks to support from IMLS. In our evaluation, we ask participants "If there had been a charge for this course, what would you have been willing to pay for it?" thinking that registration fees might help support further courses. At least half have explained that they would not have been able to pay anything. Some are volunteers or staff at institutions with small budgets, but others are state or federal government employees whose training budget has been reduced or eliminated.
2. Practical and immediately applicable information. Participants appreciate learning about broader concepts but the specific needs at their institution brought them to the course. Fortunately, most of these questions are common and may be answered by referring them to existing resources so that we don't lose focus on the course material or disinterest participants for whom this is not an issue.
3. Managing many demands. Many institutions in our target audience are struggling to keep their doors open and serving the public must be their top priority. This can leave fewer resources for collections activities, especially collections management and preservation activities that can be time intensive (e.g., cataloging, rehousing, or digitizing).

### **CE strengths**

Heritage Preservation has established relationships with a network of conservators and preservation professionals and can call upon them to serve as instructors. We have a thorough understanding of the challenges our audience faces and have learned how to effectively present technical preservation information in a way they can understand and use. The *Connecting to Collections* Online Community now has 3,000 members making it possible for us to publicize future educational opportunities easily and quickly.

### **CE weaknesses/challenges**

So many individuals need this training and need it delivered in a low-cost manner that we are grateful for the option of online learning. However, online learning is limited in not allowing hands-on demonstrations or meaningful connections with the instructors. While we attempt to answer all our participants' questions, it is not always possible or feasible. We need more ideas on how to motivate and inspire our participants but perhaps make them more responsible for their own learning. We are also challenged by the extent of the need—we could offer courses every month for years and maybe still not serve our entire audience or address all the questions they have.

### **Strategic priorities**

We have been very pleased with the capabilities of online learning for our topic and our audience so we want to continue to learn about low-cost ways we can continue to offer Massive Open Online Courses. Our first series of online courses has alerted us to additional needs for education—especially in the area of digitization and digital preservation and we will prioritize this if we do more courses. We may consider dividing future courses into two levels so that we can pitch the content to individuals with similar training and experience.

### **Funding / Sustainability**

Funding from the Institute of Museum and Library Services has supported the creation and ongoing maintenance of the *Connecting to Collections* Online Community and our current online course series. Although Heritage Preservation may investigate other grant funding sources and online advertising to fund our continuing education programs, they will likely never be self-supporting. As mentioned above, few members of our audience are able to pay more than \$20-\$50 per webinar. Even knowing that a modest fee is associated with continuing education opportunity may be enough to dissuade some of our audience that we most need to reach.

### **Key partnerships**

1. Our webinar producer, Learning Times. Although they are a paid contractor, they have taught us much about using this format.
2. We have partnered with regional conservation centers, or used individuals involved in these groups as instructors and to some degree this has helped promote our programs and reduced redundancies. That said, we are aware of similar preservation programs that are being offered by other associations, centers, or individuals and do wonder if this is confusing to our audience. Few however, are available at no charge.
3. IMLS. Conferences like this one, WebWise, and other contacts that we have made through our program officers are essential to planning effective programs.

### **Goals for the meeting**

I would like to learn more about what technologies others are using for online learning. Are there other models for engaging busy professionals who may only be able to step away from their desks for a few hours or away from their institutions for a few days? How we keep the learning going after they leave us?

## **Barb Macikas**

### **Executive Director, Public Library Association**

[www.pla.org](http://www.pla.org)

PLA works to strengthen public libraries and their contributions to the communities they serve. I am honored to work with a great board of directors and staff to implement our vision. The incredible range and pace of change libraries have and will continue to experience challenge us to provide the best training and resources possible for our diverse membership. I'm very much looking forward to seeing you all in a few weeks and to our conversation!

### **CE related services or programs**

PLA's mission is to enhance the development and effectiveness of public library staff and public library services; continuing education is at our core. PLA provides a range of CE in a variety of formats.

#### Face-to-face:

- The [PLA conference](#), held biennially, offers programs and pre-conferences on topics proposed and selected by public librarians on 8-10 training tracks.
- Preconferences at [ALA conferences](#) and standalones like weeklong "[Bootcamp](#)" management training as well as leadership training

- [Programming \(18-24 programs\)](#) at ALA conferences

#### Virtual:

- Monthly (minimum) [webinars on current topics](#) of high interest such as e-books, digital media, early literacy, presentation skills, maker-spaces, etc. Webinars are interactive and available via [archive](#) following live presentations.
- [Longer virtual \(6 week\) training](#) via Moodle
- Virtual conferences: [Virtual Spring Symposium](#) and Virtual PLA Conference
- [Turning the Page 2.0](#) advocacy training via blended learning or self-paced
- Self-paced [“service response” workbooks](#)
- Facebook forums, Q&A sessions with leading practitioners on a variety of topics

#### **Target audiences**

PLA is a national organization that provides CE for public librarians and library staff at all levels and for all sizes of libraries, so a large and diverse audience. Though training is not limited to PLA members, given our membership is composed primarily of urban and suburban librarians, these are the markets we work in most. We are attempting to provide options for smaller libraries but financial and time constraints for these libraries are barriers.

#### **Needs**

These come up consistently in evaluations as well as in discussion with PLA leaders:

- Leadership/management
- Future of libraries/managing change/technology
- Advocacy/external partnerships

#### **CE strengths**

PLA is a national leader in provision of practical, comprehensive continuing professional education. With engaged membership groups to recommend focus and assist in content development, we are able to provide strong, highly relevant training for librarians. We have the capacity to market and manage a significant quantity of training in formats from large conventions to smaller, interactive webinars.

#### **CE weaknesses/challenges**

1. For CE planning, need to be more outward focused (what others in library CE community and beyond are doing).
2. Analysis of evaluation data. We collect a lot of it and look at it short term, not much aggregation or formal longer-term evaluation. Not sure if we're collecting what we need.
3. Specifically related to virtual/webinars, how to develop programming that isn't redundant. The technology of webinar production continues to become easier so there are more and more providers. Librarians have time for only so many webinars; how to provide most effective content for them in a crowded marketplace?
4. How to best use technology to provide training; both how PLA uses it and helping the profession to take advantage of training technology; what is their capacity?
5. How to provide content to libraries with limited resources. In order to provide training/content we need to charge and that limits how much smaller libraries can participate.

#### **Strategic priorities**

PLA's strategic goals: 1. Advocacy and Awareness: PLA is an essential partner in public library advocacy; 2.

Leadership and Transformation: PLA is the leading source for learning opportunities to advance transformation of public libraries; 3. Literate Nation: PLA will be a leader and valued partner of public libraries' initiatives to create a

literate nation; 4. Organizational Excellence: PLA is positioned to sustain and grow its resources to advance the work of the association. Specific to CE:

- Leverage and extend reach of PLA conference training to extend beyond the 4 days of the meeting to maintain conversations; expand impact of training.
- Bring on more content partners to PLA conference to enrich experience and training opportunity.
- Integrate trainings where possible (TtP, Edge, leadership) internally and with partners.

### **Funding / Sustainability**

CE is self-supporting in most cases via registration fees. Some webinars are presented free as either a membership benefit or as a service to the profession, e.g., <http://www.ala.org/pla/onlinelearning/webinars/publishingportal>. In addition to registration fees, some training and conferences are subsidized by vendor support through advertising, exhibiting or sponsorships. For leadership and advocacy training, grant funding has supported training. Funding is sustainable but scale is changing, library budgets have shrunk and/or libraries are more conservative with spending against a backdrop of increasing competition within the CE provider community and beyond it (technology orgs, social services, etc.).

### **Key partnerships**

- PLA leadership/membership
- Grant Funders: Gates Foundation and IMLS
- ALA units including Association for Library Services to Children for early literacy and Public Programs Office for community engagement

### **Goals for the meeting**

- Learn about other organizations' priorities and challenges, places where we complement and where we compete.
- Identify partnership/collaborative opportunities.
- Identify gaps and redundancies in training.
- Create on-going dialogue related to library CE across organizations.

## **Jamie Markus**

### **Library Development Manager, Wyoming State Library**

<http://will.state.wy.us/>

I am the Library Development Manager at the Wyoming State Library. For the past eight years, I have been involved library continuing education on the state and national level. I am the Past President of the Wyoming Library Association and a permanent member of its Conference Program Planning Committee. I maintain a calendar and create a monthly list of free library continuing education events that many other state libraries adapt to use within their states. <http://www.wyominglibraries.org/calendar.html>

### **CE related services or programs**

The Wyoming State Library offers more than 60 library continuing education webinars each year. We also host a number of live training events both on our own and in conjunction with the Wyoming Library Association. We average more than 10,000 views of our archived webinars and a live attendance of nearly 1,000 librarians at our events annually. That is not bad for a state with less than 800 library workers.

### **Target audiences**

Public, Academic, School, and Special librarians.

**Needs**

- Training and materials that can be viewed on demand, when needed.
- Technology training and trends.
- Real advocacy training that goes beyond platitudes.

**CE strengths**

We know how to reach our audience. Wyoming is a rural state that operates on a single ILS. We have 23 county library systems, 7 community colleges, and one university. We are highly connected to each other. I know what will work in Wyoming just as well as I know what will not work.

**CE weaknesses/challenges**

I don't have the money or time to create library continuing education events for the small groups who need specialized training. For example, Wyoming does not have the non-English speaking population that other states have. The vast majority of those Wyoming residents live in only three counties. I can't afford to spend my resources to create librarian training to support non-English speakers for only three counties, when I can just as easily target another library skill that will meet the needs of more county library systems. (Of course, in cases like these, I can usually find an online course or webinar for the small groups. However, that type of training usually does not speak to the direct needs of rural Wyoming).

**Strategic priorities**

Figure out what my constituents want and need and budget and plan accordingly.

**Funding / Sustainability**

A mix of state and federal funds. Yes, as much as any other funding source.

**Key partnerships**

Other State Libraries' free CE offerings. (Redundant at times, but that allows for more voices to be heard on similar topics. Inefficient in that we have no centralized listing of these programs).

Free offerings from other library-related and non-library-related organizations.

**Goals for this meeting**

A game plan of how to work together to create and/or share library CE that makes sense for most audiences and most states' library communities.

**Maura Marx**

**Maura Marx, Deputy for Libraries, IMLS**, is just starting my third week at IMLS. For the past 10 years I've been interested in/working on the digital shift in libraries, both public and academic (and "other" ...). I'm very much looking forward to hearing from all of you, and to seeing where we might identify some areas for collective action!

Please see IMLS organization profile at the end of this report.

## Nancy Y. McGovern

### Head, Curation and Preservation Services, MIT Libraries

<http://dpworkshop.org>

I've been head of Curation and Preservation Services (CPS) at MIT Libraries for just over a year (I was responsible for developing digital preservation programs at ICPSR and Cornell before that). CPS includes a growing set of life cycle services for analog and digital materials in library, archival, and special collections here. I started presenting electronic records workshops in the early 1990s and have been pretty continuously involved in and committed to curriculum development and delivery for continuing and academic education since. I'm the director of the Digital Preservation Management workshop ([dpworkshop.org](http://dpworkshop.org)) series that celebrates its 10th anniversary this year. I've served on the faculty of the DigCCurr Institute (just started year 5) and the first round of the e-science institute. I developed the DPOE modules and train-the trainer program for LC. Since around 2000, my roles have included a mix of research, instruction, and practice - incorporating research results and practical examples into workshops and courses. Looking forward to the meeting!

### CE related services or programs

I am the director of the Digital Preservation Management workshop that is now hosted at MIT Libraries – the website (<http://dpworkshop.org>) provides information about the audience and content. We now offer one five-day workshop per year plus, typically, two or more three-day workshops. This is the 10<sup>th</sup> anniversary year of the DPM workshop.

### Target audiences

The DPM workshop audience is managers (interpreted broadly) of digital content (DigCCurr is geared towards curators who are interested in learning about tools and good practice; DPOE is geared towards a really novice audience). We use a two-step application-registration process for DPM to confirm our intended audience.

#### Needs

- Decision making as technology changes (obsolescence as a manageable and avoidable problem);
- Formalizing practice (e.g., developing policies, documenting workflows);
- Building capacity (e.g., adding content types, developing and retaining skills, scaling up to manage more content – size and number).

### CE strengths

We present a framework (standards-based, extensible, and holistic – organizational, technological, and resources) that allows them to develop a sustainable digital preservation (and curation) program. We provide the results of an ongoing scan of community research and developments, so numerous of examples and exemplars. Our modules can be re-sequenced into combinations that work in various contexts (team building for single institutions, professional development for individuals, credit options for graduate students). We engage local instructors when we take the workshop on the road. We've used a train-the-trainer approach to developing our instructors.

### CE weaknesses/challenges

We could always use better exercises that engage users. There is a greater need than our program can fill. Achieving well-formed, well-documented, and shared curriculum is an objective.

### Strategic priorities

I devote a lot of energy to continuing education. I developed the Digital Preservation Outreach and Education (DPOE) modules and train-the-trainer program for the Library of Congress. I am or have been on the faculty of a number of programs: DigCCurr Institute since 2009 and the first round of the e-science Institute. The DPTP

program in the UK is based on our DPM workshop. For me, a combination of research, instruction, and practice enables a sustainable curation and preservation program.

### **Funding / Sustainability**

For the DPM workshop series, we have received four grants from NEH: to establish, extend, move, and now assess our program. Grant 3 included developed a sustainable cost model. We have been offering workshops without grant support since 2010. The cost model covers costs for each event plus basic costs to update, prepare and keep current – the cost model does not and is not intended to cover whole or even steady portions of FTE.

### **Key partners**

DigCCurr faculty - Cal Lee, Helen Tibbo, Carolyn Hank. Many programs are geared towards managers – our DPM program and a number of others. DPOE addressed that by trying to develop practical content for a novice audience and an objective was to develop outreach materials for the executive level that is responsible for funding decisions – that’s still a gap.

### **Goals for the meeting**

Explore opportunities for collaboration, sharing curriculum, and developing training plan resources for students, practitioners, trainers, researchers, etc. A discussion of roles – instructors, trainers, sponsors.

## **Timothy Owens**

**Senior Program Officer in State Library Programs, IMLS.** Prior to joining IMLS in 2011, I served as a Library Development Consultant at the State Library of North Carolina for 14 years. I look forward to the conversation and the meeting next month!

Please see IMLS organization profile at the end of this report.

## **Mark A. Puente**

**Director of Diversity and Leadership Programs, Association of Research Libraries**

<http://www.arl.org/index.php>

A former music librarian, I have served as director of ARL diversity recruitment and leadership development programs since March of 2009. Prior to joining ARL I served as Coordinator of Digital Projects and Special Collections for the Music and Performing Arts Library at the University of Illinois at Urbana-Champaign. I have worked in a variety of functional areas in a variety of institutions including the University of Arizona, the University of North Texas, and the University of Tennessee, Knoxville. Prior to becoming a librarian I was a private voice instructor in my hometown of San Antonio, TX.

### **CE related services or programs**

ARL offers numerous webcasts and webinars delivered through a propriety platform. These are “one-shot” offerings utilizing both web interface and (for the latter) phone connections. They are created for both smaller, closed groups (participants in leadership development programs, MLIS students, etc.) as well as much larger groups, primarily from academic/research library settings. These CE events are offered throughout the program areas of ARL to include Statistics and Assessment, Public Policy, Scholarly Communication, and Diversity and Leadership. Content may be related to grant activity, to programs or services offered (e.g. LibQUAL, Scholarly Communication Institute, mentor training), or to hot button issues that arise that are of strategic concerns to the membership. ARL also offers numerous “in-person” events in support of programmatic activity. In most instances

these are delivered through an “institute” model, that is, multi-day events, utilizing program faculty involved in both synchronous and asynchronous interaction. Virtual tools are used to promote interaction both before and after in-person events.

### **Target audiences**

The primary target audience is the ARL membership, that is, staff (MLIS credentialed and not) from the 125 member institutions in the US and Canada. Resources are frequently used by academic and research library entities that extend well beyond the membership, including international constituencies. ARL Diversity programs serve MLIS students from traditionally underrepresented groups enrolled in MLIS programs throughout the US and Canada.

### **Needs**

Within the context of CE, the most important needs addressed are related to:

- 1) Library assessment and articulation of value within the context of a research intensive environment,
- 2) Informing and developing constituencies around key strategic issues of relevance to the academic and research library environment (e.g., public policy, open access, digital preservation, authors’ rights, recruitment and staffing),
- 3) Diversity and succession planning. These priorities are identified and driven by the ARL membership and executive staff and are articulated in the ARL Strategic Plan: <http://www.arl.org/about/strategic-plan>

Needs are further prioritized based on program designs of grant projects as well as other issues that emerge in higher education.

### **CE strengths**

The largest asset is the pool of experts who serve as trainers and faculty drawn from ARL member representatives (directors), faculty and staff at member libraries, higher education associations, philanthropic organizations, and other entities. ARL also leverages its resources and relationships with other thought leaders and policy makers in a variety of arenas to produce content that is current, innovative, and that challenges assumptions regarding practice and theory for the LIS profession. ARL’s brand also holds significant weight within certain communities, adding to the reach and influence.

### **CE weaknesses/challenges**

ARL is a relatively small organization that seeks to address a wide range of needs and issues with somewhat limited human resources and technology infrastructure. Building broader partnerships more consistently might improve the reach of CE efforts as well as improve upon delivery platforms or otherwise improve upon business models for greater efficiency. Assessment of the effectiveness of these programs can be regularized and improved upon with increased capacity or more robust collaborations.

### **Strategic priorities**

- 1) Produce high quality content that supports the strategic priorities of member organizations (libraries and archives)
- 2) Provide training and resources that support grant- funded projects in myriad ways and that disseminate information about project outcomes, and
- 3) Help to create and sustain learning communities and promote innovation and entrepreneurial mindsets.

### **Funding / Sustainability**

CE programs are funded through a variety of mechanisms including ARL member dues (regular and special allocations), grant funding, (i.e., CE programs underwritten in part or fully through IMLS or the Mellon foundation), and cost recovery. Financial support for CE projects will remain stable and, perhaps, increase with improved pedagogy and further evidence of the effectiveness of training.

## **Key Partners**

- 1) ALA
- 2) ACRL
- 3) IMLS

## **Goals for the meeting**

Learn from the successes of other efforts and identify opportunities for collaboration. Also, to gain better insight about technologies used by other organizations and other effective strategies for sustaining learning communities over time.

## **Katherine Skinner**

### **Executive Director, Educopia Institute**

[www.Educopia.org](http://www.Educopia.org)

Dr. Katherine Skinner is the Executive Director of the Educopia Institute, a not-for-profit educational organization that hosts inter-institutional, collaborative programs for the production, dissemination, and preservation of digital scholarship. She is the founding program director for the MetaArchive Cooperative, a community-owned and community-governed digital preservation network founded in 2004 that now preserves content with 60 institutions in four countries. She also directs the Library Publishing Coalition project, a two-year initiative to create a new organization to support library publishing and scholarly communications activities in conjunction with more than 50 academic libraries. Skinner received her Ph.D. from Emory University. She has authored and co-authored three books and numerous reports and articles. She regularly teaches graduate courses and workshops in digital librarianship topics (e.g., DPOE, NDSR) and provides consultation services to groups that are planning or implementing digital scholarship and digital preservation programs.

### **CE related services or programs**

We're beginning to develop training materials around three topical areas: ETD lifecycle management, Newspaper preservation, and Digital Publishing. We'll be doing workshops (in person and virtual) and webinars in the next year on each of these topics.

### **Target audiences**

Primarily academic/research libraries, archives, graduate schools.

#### **Needs**

- Digital preservation/curation
- Data management
- Publishing

### **CE strengths**

We're nimble and we're engaged with a broad network of powerful thinkers. Channeling that energy into affordable solutions, including "train-the-trainer" styled options, is where we will excel.

### **CE weaknesses/challenges**

We're nimble, which also means we're little. We don't have hefty resources (time/staff included) to invest. This necessarily limits what we can/want to do.

### **Strategic priorities**

Facilitate and catalyze communities of practice.

## **Funding / Sustainability**

Our programs and services start on seed/grant funding as projects and mature within an established amount of time to self-sustaining membership/participation fee-driven programs. These funds are as sustainable as anything can be expected to be in today's volatile market!

For our CE offerings, we are experimenting this year with grant-funded and seed-funded resources. We have not determined whether we will continue to build additional CE offerings—and if we do, we're likely to do so in conjunction with university partners.

## **Key partnerships**

We partner primarily with universities and academic consortia. NDLTD, LC, and our own programs (LPC and MetaArchive) will be the partners with whom Educopia will work most closely to deliver our initial spectrum of CE offerings.

## **Goals for the meeting**

I'm still learning what the summit is about. As of now, my main goals are to continue to build my knowledge/understanding of how library/archive continuing education programs are changing and my connections to others who share my interest in "spreading the gospel" as far and wide as we can and at rates that audiences can actually afford.

## **Sharon Streams**

### **Senior Program Manager, WebJunction (OCLC)**

<http://www.webjunction.org>

I have been on the WebJunction team since 2007. I began my career doing government research for a large corporate law firm in Washington, D.C., which inspired me to go to library school and learn how to be a stellar information detective. I then spent 12 years working for an international engineering society, ultimately managing the book, magazine and online publishing division. In 2007 I decided to concentrate on the web-based world of information delivery and communication, which led me to OCLC.

### **CE related services or programs**

OCLC provides free service-related training for all members online. WebJunction is a focused public library program that provides free content, webinars, workshops, conferences, and other learning resources to all library staff. WebJunction uses a mix of online and in-person formats for these services, with a focus on collaboration and social learning. Members sponsored by their state libraries also receive exclusive access to self-paced online courses, representing a mix of content from WebJunction, Skillsoft, Lynda.com, and Library U. State libraries can promote and track use of the service, and some use it to support certification programs. All grant (time-limited, subject-specific) programs implemented by WebJunction include some aspect of staff learning and development; this supplements site content and activity beyond the core.

### **Target audiences**

OCLC training serves all members, which represent a huge and diverse mix of library and cultural institutions around the globe. WebJunction serves public library staff, with an initial focus on small and rural library staff supporting library technology in the U.S. Since, WebJunction has expanded its scope to include all public library staff, and content / programs now also include library services and management.

### **Needs**

- Keeping communities connected to internet / technology

- Managing change towards the “future library” / community engagement
- Customer service / advocacy
- Public access to digital content (e-books)

*Sources: OCLC member survey (2011), WJ member survey (annual), Global Libraries stakeholder engagement and focus group report (2013), PFLTS (2012)*

### **CE strengths**

OCLC has enormous scale and operational capacity. We are able to take on large, technology-intensive, content-rich programs and deliver them on time and within budget. We have strong strategic relationships with the primary funders of library programs in the U.S. We have similarly strong operational partnerships that share our target audiences, and can work with us to design and deliver programs. WebJunction has a dedicated, passionate staff that’s knowledgeable about public library needs, and skilled in delivering programs to address those needs. WebJunction’s culture and history is one of collaboration, partnership, and deep engagement with the library community. Since 2003, WebJunction has reached nearly 70% of all U.S. public libraries and 69% of all U.S. small and rural public libraries.

### **CE weaknesses/challenges**

WebJunction relies on state library partnerships and revenue to sustain and promote our programs. WebJunction awareness and use is highest in states where we have state library partners actively promoting our offerings; but lower in states where we do not have active champions. State libraries pay a fee to be WebJunction partners, and can get frustrated with the technical infrastructure that supports our programs; the technology is difficult to maintain and sustain without large, ongoing investment. Some state libraries interact with WebJunction only as a “vendor” of a “learning platform.” I see it as a program supported in large part by OCLC and the Gates Foundation (and one that the whole field could use, take advantage of, and contribute to). WJ is working to lighten the burden of constantly upgrading the technology platform, and to improve perceptions and overall collaboration with state library agencies along these lines.

### **Strategic priorities**

Themes OCLC will address; there may be a staff learning component in each, TBD:

- Transform the library
- Advocate and engage in the community
- Lead and partner in the community
- Use technology to achieve community outcomes

Functional themes WJ will address in regards to CE service explicitly:

- Deep collaborations / coordination with public library staff CE providers
- Leverage significant operational support from Gates Foundation through 2017
- Renewed, sustaining relationships with state libraries or others that serve our audience

### **Funding / Sustainability**

OCLC is owned and governed by members; the WebJunction program is roughly supported in thirds by OCLC, the Gates Foundation, and our partners in the library community (including state libraries). The state library revenue is renewed by each state library annually. The Gates Foundation and OCLC are committed to the program through 2017.

### **Key partnerships**

- Gates Foundation / IMLS (both operations and program funding)
- State Libraries / COSLA

- Public library staff that donate their time and expertise to our community

**Redundancies:** local state library CE efforts could be better coordinated to make best use of LSTA funding; one training delivery platform could be identified, since they are so expensive to update and maintain; library-specific content could be produced systematically to eliminate separate, similar processes across the field.

### Goals for the meeting

Specific ideas for mutual collaboration and coordination of existing resources so that we can best meet public library staff needs together.

## Joseph Thompson

**Role and Organizations:** Incoming Vice President/President Elect, RUSA (Reference User Services Association of ALA); Chair, Maryland's Library Associate Training Institute (LATI) Oversight Committee

### RUSA – Online Learning

<http://www.ala.org/rusa/development/onlinece>

### Maryland's LATI

[http://www.merlincommunity.org/index.php?option=com\\_content&task=view&id=16&Itemid=131](http://www.merlincommunity.org/index.php?option=com_content&task=view&id=16&Itemid=131)

Hello everyone! I was a late addition, but I'm still so sorry to be posting the day before our meeting! My name is Joe Thompson and I'll be representing RUSA (the Reference User Services Association), a division of the American Library Association. I was elected this spring as RUSA's Vice President/President Elect. The job I've held for 5 years is Associate Director for the Western Maryland Regional Library, which is a state-funded organization that provides a variety of support services for the public library systems of 3 counties. One service we provide is staff development. Prior to my current job I was the coordinator of Maryland's statewide chat/virtual reference service, Maryland AskUsNow! and trained all of the service providers over that period of time. Of the many professional roles that I currently play, one is in chairing Maryland's Library Associate Training Institute (LATI) Oversight Committee. This is our long-standing state-sanctioned program that trains people with Bachelor's degrees to perform many common librarian roles at our public libraries. Our LATI Coordinator is now in the process of matching our curriculum with the ALA-APA program LSSC. I'll look forward to meeting you all in person tomorrow in Northern Virginia!

### CE services or programs

RUSA and its sections provide face-to-face continuing education opportunities through programs, discussions, and events at the ALA Annual Conference and ALA Midwinter Meeting each year. I'm also chair of RUSA's Conference Program Coordinating Committee, so should note that there will be 16 RUSA programs taking place during the ALA Annual Conference in Chicago in just a few weeks. These range over many topics and include ILL, reader's advisory, Smart Investing @ your library, and a presentation by Lee Rainie of the Pew Internet and American Life Project – to name a few. RUSA also offers online learning through multi-week courses and webinars. See <http://www.ala.org/rusa/development/onlinece>. These are offered at a discount for members, and in fact some of the webinars are currently being offered for free. RUSA committees also develop and maintain guidelines that serve libraries as documentation of best practices, as well as "best of" lists of books and web sites.

Maryland's LATI program is provided to Maryland Public Library staff, who are required by state law to complete 90 contact hours of continuing ed. within their first 2 years of employment as Library Associates. The course is

provided partially face-to-face and partially online. Topics include model reference behaviors, reader's advisory, programming, and service areas including business and legal references.

### **Target audiences**

RUSA's audience is very broad, made up of library staff who tend to have an interest in one of RUSA's six section areas: BRASS (Business), CODES (Collection Development), History, MARS (Reference Technologies), RSS (Frontline Reference), and STARS (Resource Sharing).

Maryland LATI is provided to Maryland Public Library staff who have bachelor degrees and are in Library Associate positions. Those with an MLS do not participate. Completion of LATI is required within the first two years of employment in order to be eligible for participation in the State Teacher's Retirement and Pension System.

### **Audiences Needs**

RUSA: The greatest need varies depending on the position held by the RUSA member, and in general these needs have been identified at the section level through surveys of the membership.

LATI: The curriculum has been established based on a study and subsequent report developed by a consultant in 2008. To a great extent the curriculum was determined based on the needs identified by Maryland's public library directors and their staff development coordinators.

### **CE strengths**

RUSA has a long history of developing face-to-face programs at the ALA Annual Conference that have drawn solid attendance. The multi-week online courses have been offered for at least 5 years (though I'm not confident of exactly how long), and the Reference 101 course has been one of the most popular. The short one-shot webinars are a relatively new offering, only over the past few months. This has been determined to be an important growth area for the division, in the context of many RUSA members being unable to travel to conferences due to limited or no funding for continuing education from their employers.

LATI: The balance between face-to-face and online classes is reported by the LAs themselves to be appropriate. Maryland's LATI serves as one of the leading examples of a statewide training program for library paraprofessionals.

### **CE weaknesses/challenges?**

RUSA: Evaluative and historical data regarding program attendance is either non-existent or only available at the section level. This makes it a challenge to predict membership needs and likely attendance numbers. More RUSA members still need to be trained and be supported so that their comfort level providing/facilitating online instruction and discussions is increased. Only recently have program organizers been asked to determine learning outcomes (this is now done at the time that organizers complete a program proposal).

LATI: We've been very successful adapting the program each cohort to meet the changing needs of the participants. As we now update the LATI curriculum, we find that there are more topics that perhaps should be included, yet it is a challenge to figure out how to fit additional content into the limited timeframe available. Some libraries have also expressed interest in sending their MLS-degreed librarians through the program in order to inculcate them into Maryland's public library statewide culture, however there aren't enough seats available to be able to accommodate these additional individuals at this time.

## **Strategic priorities**

Based on direction offered in the strategic plan, RUSA is moving toward offering more webinars. One of my interests as incoming president is to make sure that we are addressing the needs and interests of the members as we develop new continuing ed. opportunities.

Maryland's LATI is approximately halfway through the process of thoroughly reviewing the curriculum, the first full review since 2008.

## **Funding and sustainability**

RUSA: The division itself is funded through membership, advertising (in the division's journal RUSQ), and program/course/webinar registration. Like many of the other ALA divisions, membership continues to slip.

LATI: Funding to pay for the coordinator and virtual assistant is provided through a grant from the Division of Library Development and Services, Maryland State Department of Education. This is an IMLS LSTA grant.

## **Key partnerships**

RUSA: The RUSA office staff are shared with the ACLSA division. Support for some RUSA programs comes through grants. An example includes Smart Investing @ your library which partially supported by FINRA. There are potentially redundancies in program development across ALA. It would be ideal if program organizers could see other programs being organized across ALA in order to partner or find ways to eliminate the duplication.

LATI: The program works very closely with the public libraries, depending on their local supervisors, trainers, and use of library meeting rooms for face-to-face classes at no charge.

## **Goals for this meeting**

Ideas for how RUSA can best identify the continuing education needs of its members and formulate methods to have them addressed.

## **Jay Turner**

### **Director of Continuing Education and Training, Georgia Public Library Service**

<http://georgialibraries.org/lib/training/>

I've spent the past seven years supporting staff learning in public libraries. Over the course of my 17-year library career, I've done a little bit of everything: shelving books, assisting customers on the front lines, working with teens, planning successful events for staff and the public, supporting technology initiatives, consulting with library administrators on implementing or improving training programs.

### **CE related services or programs**

GPLS meets the training and development needs of 63 public library systems and their 3,100 staff members by providing a blend of live, instructor-led CE programs alongside a burgeoning e-learning initiative. We achieve this through a blend of instructor-led programs and consulting services, self-paced e-learning, web conferencing and video streaming. Details of these programs are below.

Instructor-led programs (in-person and online):

GPLS provides multi-day intensive training boot camps geared toward administrators and functional managers with emphasis on teaching hard skills and promoting dialog about emerging trends in given subject matter, and individual workshops to help a library meet training and CE needs. Workshops and seminars are used to support general continuing education and reinforce technical skills for working with the Evergreen ILS used by 90% of Georgia's public libraries.

#### Self-paced E-Learning

GPLS will provide Skillsoft's Skill Choice Complete library and Lynda.com for the entire FTE count for public library staff in Georgia, as well as utilizing the Skillport learning management system (LMS) to deliver this content and custom assets specifically for libraries (self-paced courses, webinar archives, job aids, podcasts, etc.), manage GPLS's instructor-led training programs, and enable individual library systems to use Skillport as their own internal LMS free of charge.

#### Web Conferencing and Video Streaming

Georgia is a geographically dispersed state, so to help keep travel cost down while encouraging collaboration and learning within and between library systems, GPLS provides public libraries in the state access to WebEx Enterprise Edition (Meeting Center, Training Center, Support Center, and Event Center). We also use free online streaming services, like Livestream, to augment our capabilities for streaming meetings to a virtual audience.

### **Target audiences**

GPLS is responsible for designing, implementing, and evaluating a comprehensive training and continuing education for Georgia's 63 public library systems, which encompasses roughly 3,100 FTE. Within the sphere of public libraries, our primary target audiences are library directors, degreed librarians, paraprofessionals, and support staff.

#### **Needs**

- Staying current with emerging technologies and strengthening existing tech competence
- Staying current with trends and disruptions that affect how libraries serve their communities
- Marketing, outreach, and advocacy

### **CE strengths**

Georgia has come a long way in establishing a learning culture that embraces e-learning. We continue to leverage relationships within the University System of Georgia and devote time and resources to evolve our e-learning program. Since I am a department of one, the assets I bring on behalf of my organization are passion, creativity, and technical skill in course design and multimedia asset creation.

### **CE weaknesses/challenges**

- Increasing participation in CE, particularly among paraprofessionals and support staff
- Addressing communication bottlenecks that prevent staff at all levels/locations from hearing about CE opportunities
- Budget constraints / lack of specified CE budget
- Functioning as a department of one (solely responsible for creating content, delivering presentations, and administering our CE program)

### **Strategic priorities**

- Staff in Georgia's libraries will have access to relevant, convenient, and enriching CE programs
- Support core competencies in staff at all levels
- Leverage technology to cultivate a community of learning

- Enhance executive leadership capacity

### **Funding / Sustainability**

Our programs and services are funded by a blend of federal and state dollars. For FY14, Skillport and Lynda.com will be funded exclusively with state money. WebEx services will be funded by LSTA. While I'm hopeful GPLS will be able to continue to support the full range of CE programs we provide (after all, CE accounts for one of the smallest expenditures in the GPLS budget, yet has great reach and value) I do worry about the sustainability of state funds and LSTA grants. Funding for higher ed, which covers the state money my agency receives, has been flat or cut for five straight years. Our LSTA grant has taken a sizeable reduction due to sequestration. The future looks grey.

### **Key partnerships**

- University System of Georgia: GPLS is part of the university; therefore, we can take advantage of economies of scale when it comes to procuring some assets that support library CE. WebJunction partner states have access to some Skillsoft content and a limited number of Lynda.com licenses. Some state libraries use the same authoring tools to create e-learning. There is an opportunity for better coordination and content sharing.
- Other SLAs: The CE community within SLAs is very active and always looking for ways to share content and resources. A core group of engaged, active leaders within this community are spearheading a network of exchange, but there is plenty of room to grow. Having a low-cost, unified, national platform for content management and delivery (with a set of standards for quality) would help SLAs not constantly reinvent the wheel.
- Informal network of training and CE professionals: Since I do not have a fixed budget for CE, I work closely with my network of colleagues in public and academic libraries to get as much quality, free CE support as possible.

### **Goals for the meeting**

I would like to identify potential partnerships for my agency that support CE that we are not currently leveraging. I also look forward to learning about CE needs profession-wide, rather than in my own backyard.

## **Beth Yoke**

### **Executive Director, Young Adult Library Services Association (YALSA)**

[www.ala.org/yalsa](http://www.ala.org/yalsa)

Beth Yoke, CAE, has served as Executive Director of YALSA since 2004. At YALSA she has overseen the expansion of YALSA as well as the implementation of new initiatives such as the Young Adult Literature Symposium and the *Journal of Research on Libraries and Young Adults*. Prior to working at YALSA, Yoke worked as a university librarian at Fairmont State University, as a school librarian in Stafford, VA, and an elementary school teacher in New Orleans, LA. Beth Yoke holds a Masters in Library and Information Science from LSU.

### **CE related services or programs**

Current formats:

- Monthly webinars
- E-courses 3x per year
- Programs at ALA Annual & Midwinter
- Licensed institutes
- Young Adult Literature Symposium
- "YALSA Academy" videos on YouTube

- Twitter chats
- Google Hangouts
- Curriculum via training kits & canned presentations

Formats in development:

- Digital badges
- MOOC via P2PU

Content: information to help librarians and library workers be effective at serving teen patrons, with a focus on skills and knowledge that are presented in YALSA's Competencies for Librarians Serving Youth:

[www.ala.org/yalsa/guidelines/yacompetencies2010](http://www.ala.org/yalsa/guidelines/yacompetencies2010)

### **Target audiences**

1. Teen services librarians
2. Secondary school librarians
3. Youth services librarians
4. Public library support staff
5. Public library generalists
6. School library support staff
7. LIS graduate students
8. Library administrators

### **Needs**

- Leadership and management skills
- Advocacy skills
- Capacity: funding for training (both travel & registration), time off for training, access to tech for training

### **CE strengths**

- Track record for delivering quality training
- Being cost effective
- Contacts, such as at state library agencies
- Leadership/governance in place that recognizes CE as a priority
- Infrastructure to plan and deliver CE
- Knowledge of emerging technologies for delivering CE
- The drive and passion to provide CE to our constituents

### **CE weaknesses/challenges**

#### **Weaknesses**

- Reach – with only about 33% of public libraries having one or more FTEs that are teen specialists, there is a very large population of public library staff that we are not reaching with our CE
- Marketing – not enough staff or resources to do a lot of promotion of our CE
- Evaluation – not enough staff or resources to do in-depth evaluations, just on the fly stuff
- Quality control – there is a lot of CE out there being done around teen services that is not coming from YALSA and may or may not be adequately incorporating best practices in CE and/or YALSA's guidelines, standards and curriculums

#### **Challenges**

- Competition – everyone and their brother is offering CE, much of it at no cost to attendees
- Distinguishing our CE from all of the other offerings that are out there – why isn't there an award or seal of approval sort of thing for e-courses, webinars, etc.?

- Funding – the vast majority of our CE is funded by charging fees to participants, which is a barrier for many librarians and library workers

### **Strategic Priorities**

From YALSA's Strategic Plan:

Goal 3: Continuous Learning and Professional Development

YALSA members and those in the library community who work for and with teens and young adults have the knowledge and skills they need to effectively serve them.

Objective 3a: Significantly increase the number of library workers trained in teen and young adult services.

Objective 3b: Teen and young adult services librarians and secondary school librarians stay up to date on their skills and knowledge.

Objective 3c: Significantly more trainers at the regional, state and local levels use and promote YALSA's portfolio of national guidelines and competencies.

Objective 3d: YALSA has significantly expanded its portfolio of continuing education (CE) opportunities by incorporating new and flexible methods of delivering CE.

Objective 3e: YALSA members and others serving teens and young adults who keep up to date on their knowledge and skills are recognized for their proficiency.

### **Funding / Sustainability**

Mainly by charging fees to participants – we've seen a drop off in participation since 2008, and we have scaled back some of our CE as a result. We can keep offering CE, but we're reaching a smaller audience.

### **Key partnerships**

- the Digital Media and Learning competition (MacArthur is a major funder of the DML effort)
- connectedlearning.tv
- Educator Innovator project

### **Goals for the meeting**

- Find ways to build YALSA's capacity to deliver CE to a bigger audience
- Explore the possibilities of strategic partnerships, especially those that would increase each partner's reach and effectiveness
- Learn about other CE efforts and best practices that YALSA may be able to adapt
- Discuss the development of a vision for future continuing education. Libraries are undergoing a sea-change from being places that provide content to spaces that also facilitate the creation and sharing of content. It's like we're morphing from a grocery store to a kitchen. Librarians and library workers need an entirely new skill set to achieve that, and if we don't provide it, then libraries won't be successful in this transformation and will cease to be relevant.

## Appendix B: Aggregated Responses Used in Summit Discussions

Question Category	Aggregated Responses
<b>Target Audiences</b>	<ul style="list-style-type: none"> <li>• U.S. and Canada</li> <li>• International</li> <li>• Low-income/marginalized communities</li> <li>• Library workforce of all types</li> <li>• State government employees</li> <li>• Academic libraries and their staff</li> <li>• Research libraries and their staff</li> <li>• Digital content managers and interested parties</li> <li>• Small museums and archives</li> <li>• Public libraries and their staff</li> <li>• Public library paraprofessionals</li> <li>• Public library support staff</li> <li>• Urban and suburban public libraries</li> <li>• School librarians</li> <li>• Library administrators/directors</li> <li>• Professional librarians</li> <li>• Organizations involved in training</li> <li>• CE providers</li> <li>• Graduate schools</li> <li>• LIS students and emerging professionals</li> <li>• Post-Master's</li> <li>• Post-baccalaureate</li> </ul>
<b>Audience Needs</b>	<ul style="list-style-type: none"> <li>• Assess community needs, deliver services</li> <li>• Planning, evaluation</li> <li>• Rapid innovation, nimbleness, adaptability</li> <li>• Leadership and management skills, new director training</li> <li>• Collaboration, cooperation, sharing</li> </ul>

	<ul style="list-style-type: none"> <li>• Marketing, outreach, advocacy skills</li> <li>• Assessing and communicating value of the library</li> <li>• Diversity and succession planning</li> <li>• Understanding of and participation in issues of strategic importance</li> <li>• Community engagement strategy</li> <li>• Shift to digital</li> <li>• Technology competence</li> <li>• Keeping up with technology</li> <li>• Digital preservation</li> <li>• Digital literacy</li> <li>• Data management</li> <li>• Capacity to learn (time, money, access)</li> <li>• Formalizing work practices</li> <li>• Scaling capacity</li> <li>• Core library skills training</li> <li>• Trained librarians</li> <li>• Updated skills</li> <li>• Broaden skills</li> <li>• Publishing</li> <li>• Free or low-cost training</li> <li>• Working effectively with limited resources</li> <li>• New models for services/programs</li> <li>• Practical solutions, resources, ideas</li> <li>• Youth services, school readiness, early literacy, working with the school system</li> <li>• Basic skills for new staff at all levels</li> <li>• Networking and sharing among CE providers</li> <li>• Advocate for CE</li> </ul>
<b>Organizational Strengths</b>	<ul style="list-style-type: none"> <li>• Funding</li> <li>• Cost-effectiveness</li> <li>• Networking</li> <li>• Partnering</li> </ul>

	<ul style="list-style-type: none"> <li>• Convening</li> <li>• Scaling nationally</li> <li>• Collaboration</li> <li>• Multiple perspectives</li> <li>• Brand</li> <li>• Experience (time in the field)</li> <li>• Passion, creativity</li> <li>• Nimbleness</li> <li>• Convening CE providers</li> <li>• Buy-in, support of CE as high priority</li> <li>• Quality/effectiveness of CE offerings</li> <li>• Quantity of CE offerings</li> <li>• Variety of CE formats</li> <li>• CE online tools</li> <li>• Webinars</li> <li>• Online courses</li> <li>• E-learning</li> <li>• CE creation skills</li> <li>• Knowledge of technology</li> <li>• Affordable solutions</li> <li>• Able to train the trainers</li> <li>• Best practices</li> <li>• Combinable modules</li> <li>• Localization of content</li> <li>• Pool of subject matter experts</li> <li>• Marketing reach</li> <li>• Newsletter</li> <li>• Sharing stories from the field</li> <li>• Outcomes-based evaluation</li> </ul>
<b>Organizational Challenges</b>	<ul style="list-style-type: none"> <li>• Funding constraints</li> <li>• Limited staff resources &amp; time</li> <li>• Needs are too great, must prioritize</li> <li>• Rapid response to needs/changes</li> </ul>

	<ul style="list-style-type: none"> <li>• Keeping CE current</li> <li>• Centralizing, coordinating learning resources</li> <li>• Partnering to assess and meet needs</li> <li>• Sustainability</li> <li>• Sharing knowledge</li> <li>• Sharing curriculum</li> <li>• Coordinating efforts for efficiency and reach</li> <li>• Increase opportunities for CE providers to network and learn</li> <li>• Competition/redundancies with other CE providers</li> <li>• Variable quality of CE offerings across the field</li> <li>• Improve online learning</li> <li>• Communication/marketing CE</li> <li>• Decrease in CE offerings</li> <li>• Evaluation improvements</li> <li>• Strategic use of technology for training delivery</li> <li>• Charging learners decreases usage</li> <li>• Decrease in participation</li> <li>• Learner motivation – stretching beyond comfort zone, being accountable for learning</li> <li>• Increase learner engagement with content improvements</li> <li>• Learner preference for face-to-face over online</li> </ul>
<b>Strategic Priorities</b>	<ul style="list-style-type: none"> <li>• Move the field/libraries forward</li> <li>• Vision and realization of future libraries (transform the library)</li> <li>• Support innovation, creativity, curiosity</li> <li>• Improve library effectiveness, service, leadership, force for positive change</li> <li>• Grow library leadership</li> <li>• Support integration of emerging tech, tools, services</li> <li>• Increase skills of library staff</li> <li>• Library staff have up to date skills</li> <li>• Support CE</li> <li>• Advocate for CE</li> </ul>

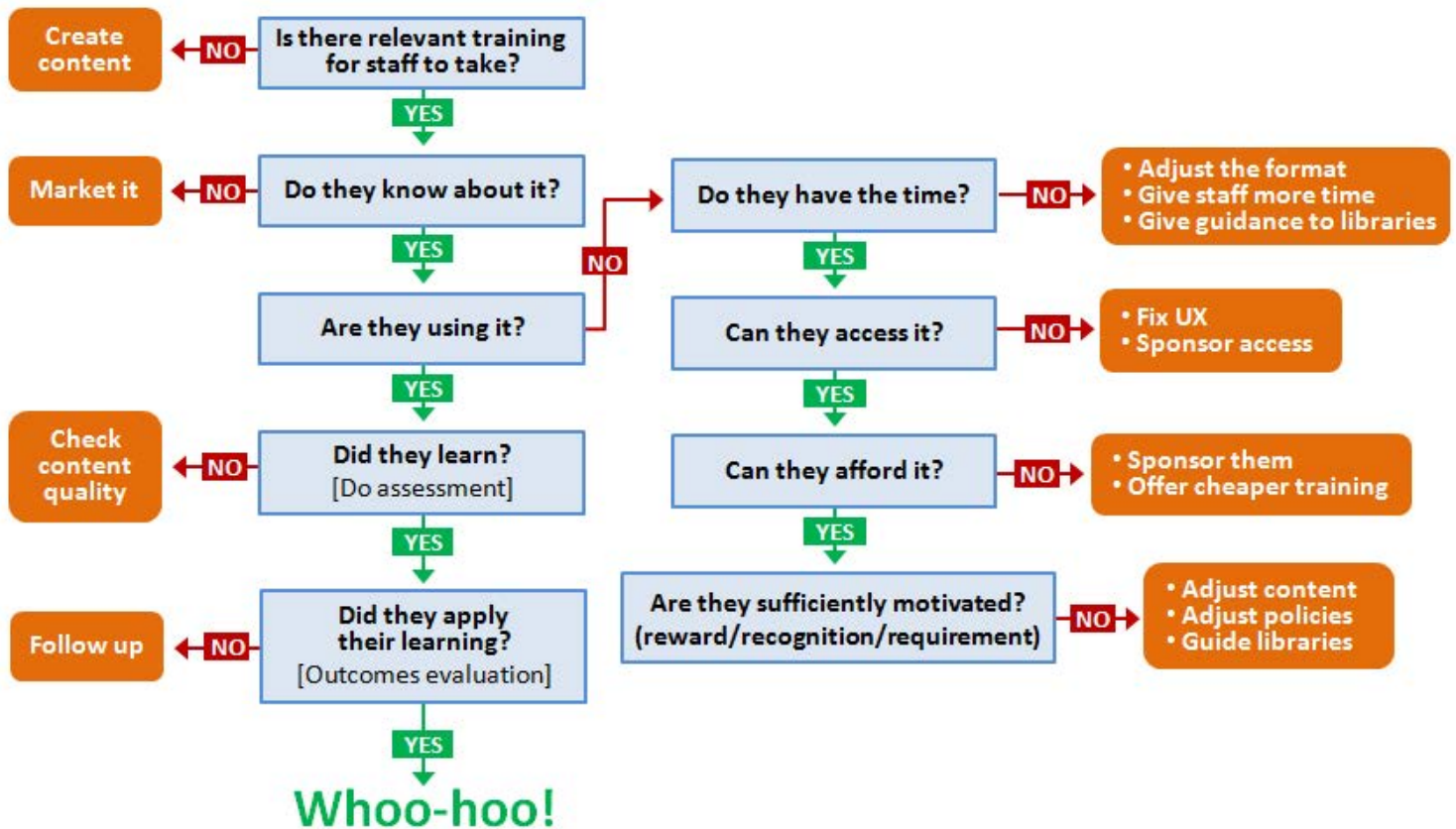
	<ul style="list-style-type: none"> <li>• Support collaboration</li> <li>• Scale</li> <li>• Sustain</li> <li>• Increase partnerships</li> <li>• Improve integration</li> <li>• Online training</li> <li>• More trainers</li> <li>• New methods of CE delivery</li> <li>• Shorter courses</li> <li>• Online tools</li> <li>• Facilitate communities of practice</li> <li>• Low-cost MOOCs</li> <li>• Produce high-quality content</li> <li>• Recognition of successful learners' competency</li> <li>• Expand reach</li> <li>• Leverage technology</li> <li>• Enhance executive leadership capacity</li> <li>• Training/resources for grant projects and evaluation</li> <li>• Create and sustain learning communities</li> </ul>
<b>Goals for meeting</b>	<ul style="list-style-type: none"> <li>• Sustainable CE business models</li> <li>• CE priorities</li> <li>• CE content identified</li> <li>• CE capacity identified</li> <li>• Potential new grants</li> <li>• Initiate and continue discussion</li> <li>• Learn what others are doing</li> <li>• Increase reach of CE</li> <li>• Support CE</li> <li>• Digital literacy</li> <li>• Share ideas, successes</li> <li>• Share speaker resources</li> <li>• Share curriculum/content</li> <li>• Collaboration/replication</li> </ul>

	<ul style="list-style-type: none"> <li>• New partnerships</li> <li>• Learn best practices for CE</li> <li>• Vision of CE's future to prepare library workers for sea-change</li> <li>• Identify areas of competition</li> <li>• Identify CE gaps</li> <li>• Identify how can LIS programs meet CE needs</li> <li>• Develop training plan resources</li> <li>• Discussion of roles in CE</li> <li>• Identify technologies for online learning</li> <li>• How to engage/support busy learners</li> </ul>
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## Appendix C: Pre-Reading Information

### Flowchart of Learner Needs & Solutions

(WebJunction)



**BILL AND MELINDA GATES FOUNDATION**  
**LIBRARY SURVEY FINDINGS**  
*April 2013*

**Executive Summary**

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The Global Libraries Initiative of the Bill & Melinda Gates Foundation is exploring a variety of strategies to accelerate change in US public libraries. To guide this work, the team solicited information and ideas from a wide range of stakeholders in the library field using an online survey. This memo is intended to provide brief highlights from the survey; the full report, “Summary of Stakeholder Survey Results” is attached.

To understand needs, opportunities and roles for libraries in the future, five plus years from today, an online survey was distributed to as broad and diverse a library constituency as possible via library support organizations as well as to more than ten well-respected bloggers. The survey generated over 4,200 responses between October 2012 and January 2013. Results from the initial 3,195 responses were used to develop the “Summary of Stakeholder Survey Results” in December 2012. Additional survey responses received after December were tabulated and no significant differences from the initial analysis were found.

Via the survey, the Global Libraries Initiative was interested in gaining high-level insight into three questions:

1. What is the role of the future library when information will be primarily accessible via a device?
2. What are key attributes of a successful future library?
3. How might support and funding from the Global Libraries Initiative most effectively help libraries develop these attributes?

Below is a summary of the most frequently provided responses to the survey questions.

- What is the role of the future library when information will be primarily accessible via a device?
  - *“Navigating and curating information”* was most frequently mentioned; and,
  - *“Trained librarians”* was cited as most important.
- What are key attributes of future library?
  - *“Trained librarians”* and *“Visionary, effective leadership”* were ranked ordered as two most important attributes.
- How might support and funding from the Global Libraries Initiative most effectively help libraries develop these attributes?
  - *“Collaborative efforts between/among libraries to test innovative new services and share results with field”* and *“Training and skills development for library workers”* were both most frequently mentioned and rank ordered highest in response to this question.

As a follow up to the survey, the Global Libraries Initiative conducted focus groups with library leaders in the US to discuss the survey findings and identify topics and opportunities to explore more deeply with additional library stakeholders in the spring and summer of 2013.

# Global Libraries Program

## Summary of Stakeholder Engagement Survey Results

BILL & MELINDA  
GATES *foundation*

**January 2013**

# Purpose of Survey

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- To understand needs, opportunities and roles for libraries in the future (5+ years from today), the survey solicited input from a broad sample of library stakeholders. Three primary questions were explored in the survey:
  - What will be the role of libraries in the future when most information in the world can be accessed via a device?
  - What attributes should libraries have to be successful in this future?
  - How can Gates Foundation support and funding most effectively help libraries develop these attributes?
- Survey results will also inform areas for additional learning and exploration in Phase 2 of the stakeholder engagement project.

# Survey Methodology

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- Web-based survey sent to members of library support organizations including: ALA, ULC, COSLA, WebJunction, and Lyrasis, as well as to more than ten well-respected bloggers in the public library community (Appendix A).
- Analysis conducted on 3,195 completed surveys
  - Responses filtered by those affiliated with libraries and those not affiliated;
  - Responses of those affiliated with libraries > 6+ years compared to those <5 years;
  - Responses to open-ended questions were analyzed by key words and phrases and then grouped under common themes;
  - Responses compared to one another to identify reinforcing themes as well as contradictions or discrepancies.

# Findings--Highlights

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- Respondent Profile (based on 3195 completed surveys)
  - Nearly all (87%) affiliated with the library field with a tenure of 6+ years
  - Vast majority (87%) from the United States
- Role of library in future
  - Help navigate and curate information (most frequently mentioned)
  - Trained librarians (most important)
- Most important attributes of future libraries (rank ordered)
  - Trained librarians
  - Visionary, effective leadership
- Recommended funding priorities (rank ordered & frequency)
  - Collaborative efforts between/among libraries to test innovative new services and share results with field
  - Training and skills development for library workers

# Findings--Highlights cont'd

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- If only one recommendation for funding priority
  - Training for staff (leadership, advocacy, technology and general)
  - Marketing and advocacy efforts
  - Innovative practices (services)
  - Collaborative efforts and shared resources
  
- Differences based on respondents demographics:
  - No significant differences responses from respondents affiliated with the library field based on length of tenure.
  - Small differences when comparing answers of respondents affiliated with the library field to those not affiliated with the library field:
    - Those affiliated with the library field identified opportunity for Gates Foundation to support collaborative efforts and testing innovative and promising library services as “**very important**” whereas those not affiliated with the library field did not.
    - Those affiliated with the library field were much more likely to rate **all** characteristics listed in the survey as “**important**” to “**very important**” to the success of a library. Respondents not affiliated with the library field spread their responses more evenly across the scale.

# Respondent Demographics

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- 87% of respondents are formally associated with a library or the library field (e.g. library staff, library trustee, staff of a library support organization, etc.).
- 87% of respondents are from the United States.
- 13% of respondents outside of the US and reside in the following countries:
  - Canada, United Kingdom and Australia/New Zealand = 9%
  - 71 additional countries = 4%

# Respondent Demographics cont'd

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- Types of affiliation with library field

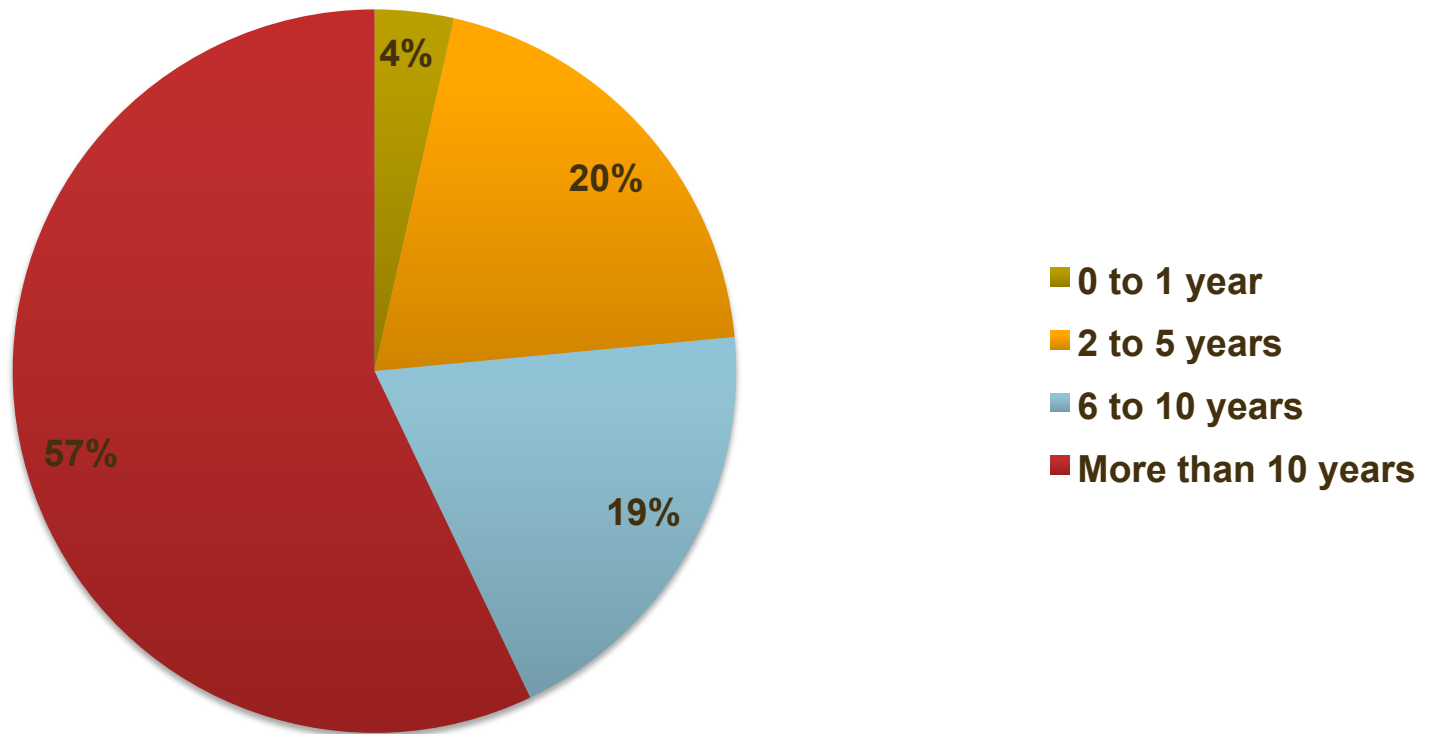
*Note: Percentages add up to more than 100% because a respondent could mark more than one way he/she is affiliated with a library.*

- 87% work in a public library;
- 15% are academic librarians;
- 8% work for a library support organization (i.e. a state library, state library association, ALA, PLA, IFLA, etc.);
- 6% are library trustees;
- 3% are either retired librarians or are studying to be librarians;
- 2% are members of a Friends of the Library organization.

# Demographic Information of Survey Respondents

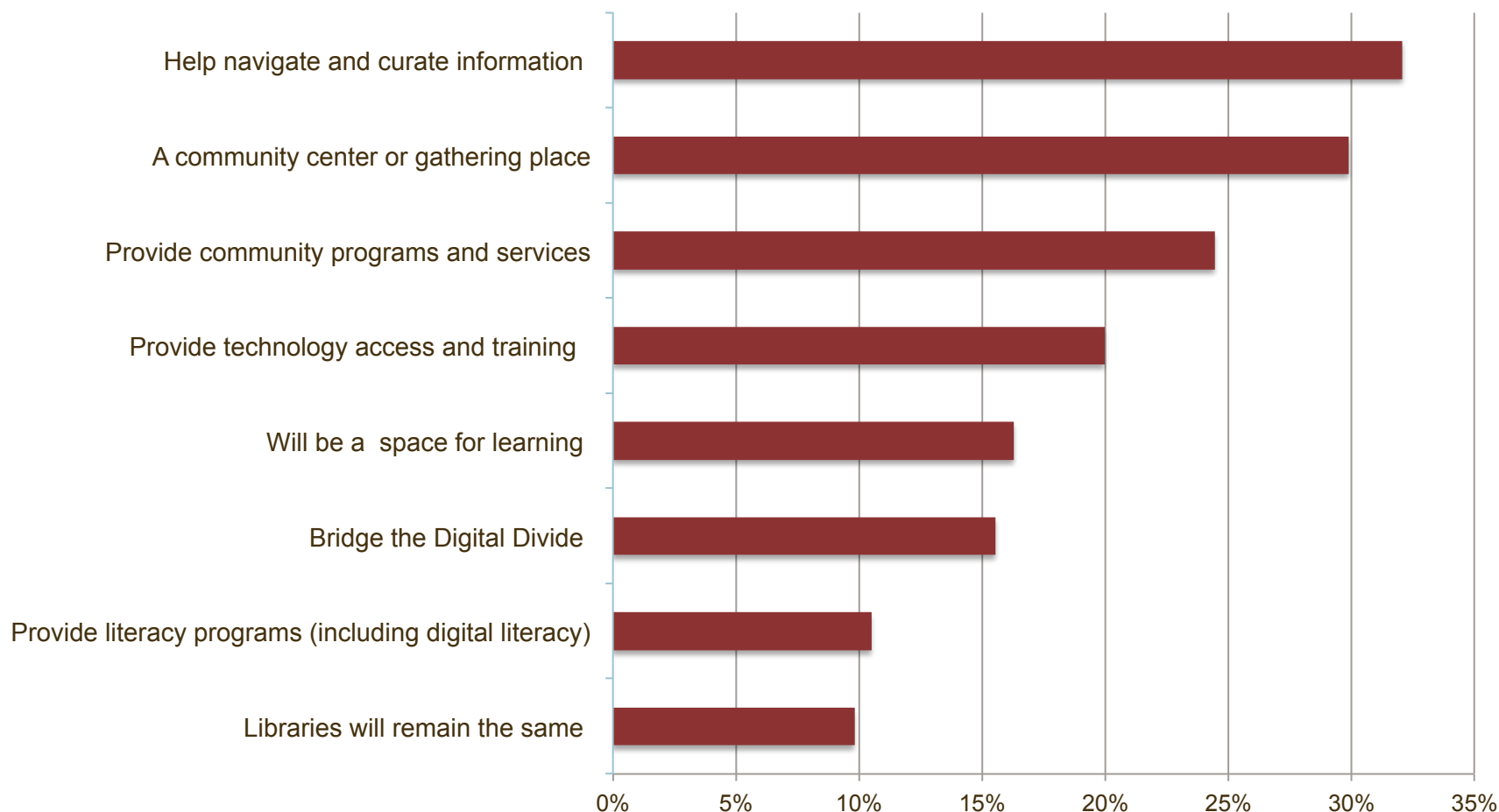
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The chart below illustrates how long respondents have been associated with either a library or the library field, with 76% being in the field six years or longer.



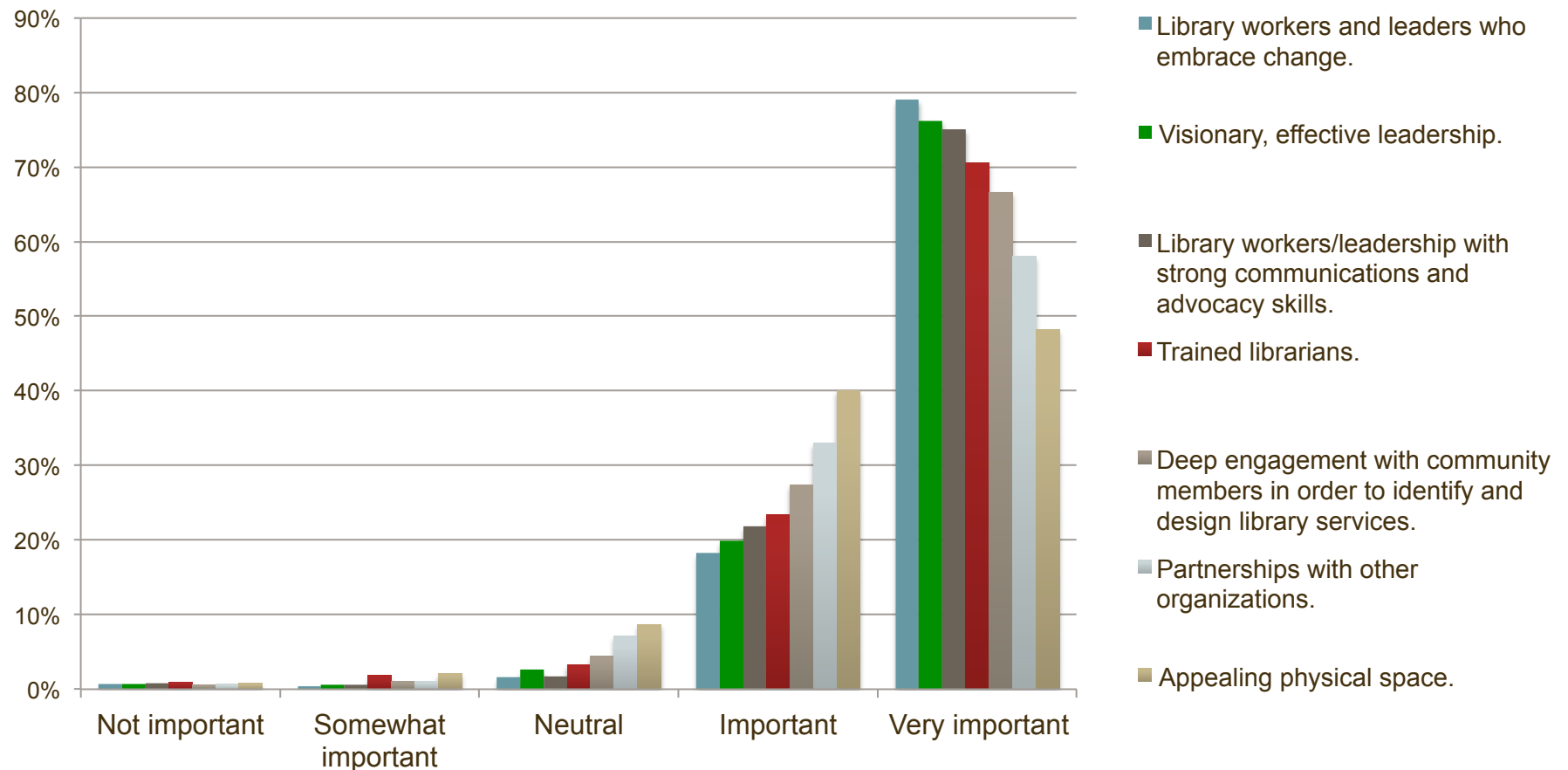
## What is the role of the the public library in the future when most information in the world can be accessed by a device and how will it be different from the role of the public library now?

A total of 2,283 people or a little over 70% of all survey respondents answered this question. Below are the most frequently cited answer themes.



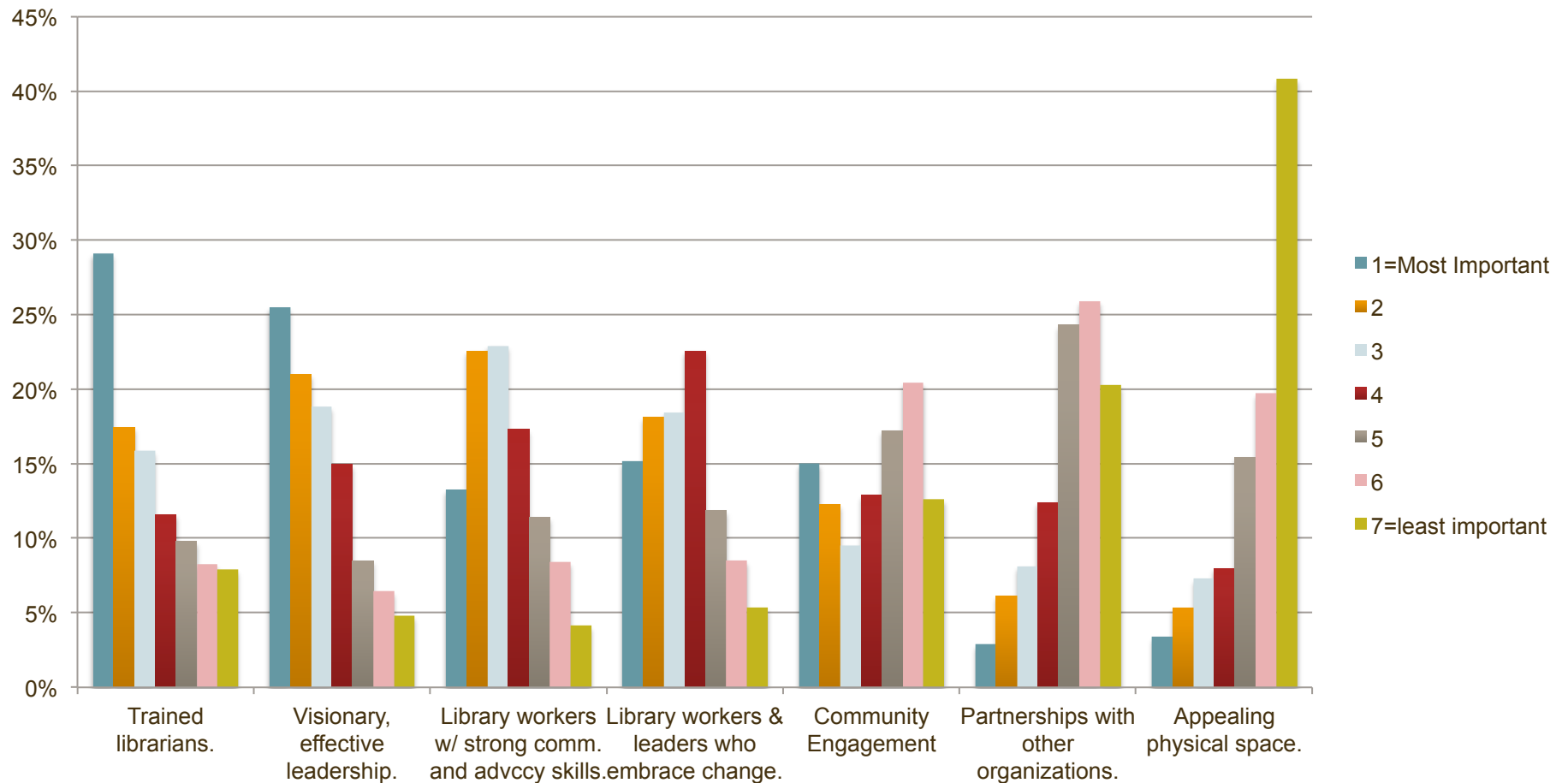
# How important are characteristics (listed below) to the success of a future library?

- Most characteristics were rated as “**very important**” or “**important**” to the success of future libraries, yet:
  - **Library workers and leaders who embrace change** and **visionary, effective leadership** were rated most frequently as being “**very important**” by respondents;
  - Appealing physical space and partnerships with other organizations were rated as relatively “less important” than other characteristics;
  - About 9% of respondents wrote in the “other” category with the majority reinforcing the importance of training.



## Rank order each characteristic in terms of how important it is to the success of the future library.

- When forced to **rank order** the importance of each characteristic, priorities changed slightly from previous question:
  - Trained librarians** moved up to the top from 4<sup>th</sup> and **workers who embrace change** dropped from 1<sup>st</sup> to 4<sup>th</sup>
  - Appealing physical space** continued to lag as “least important”

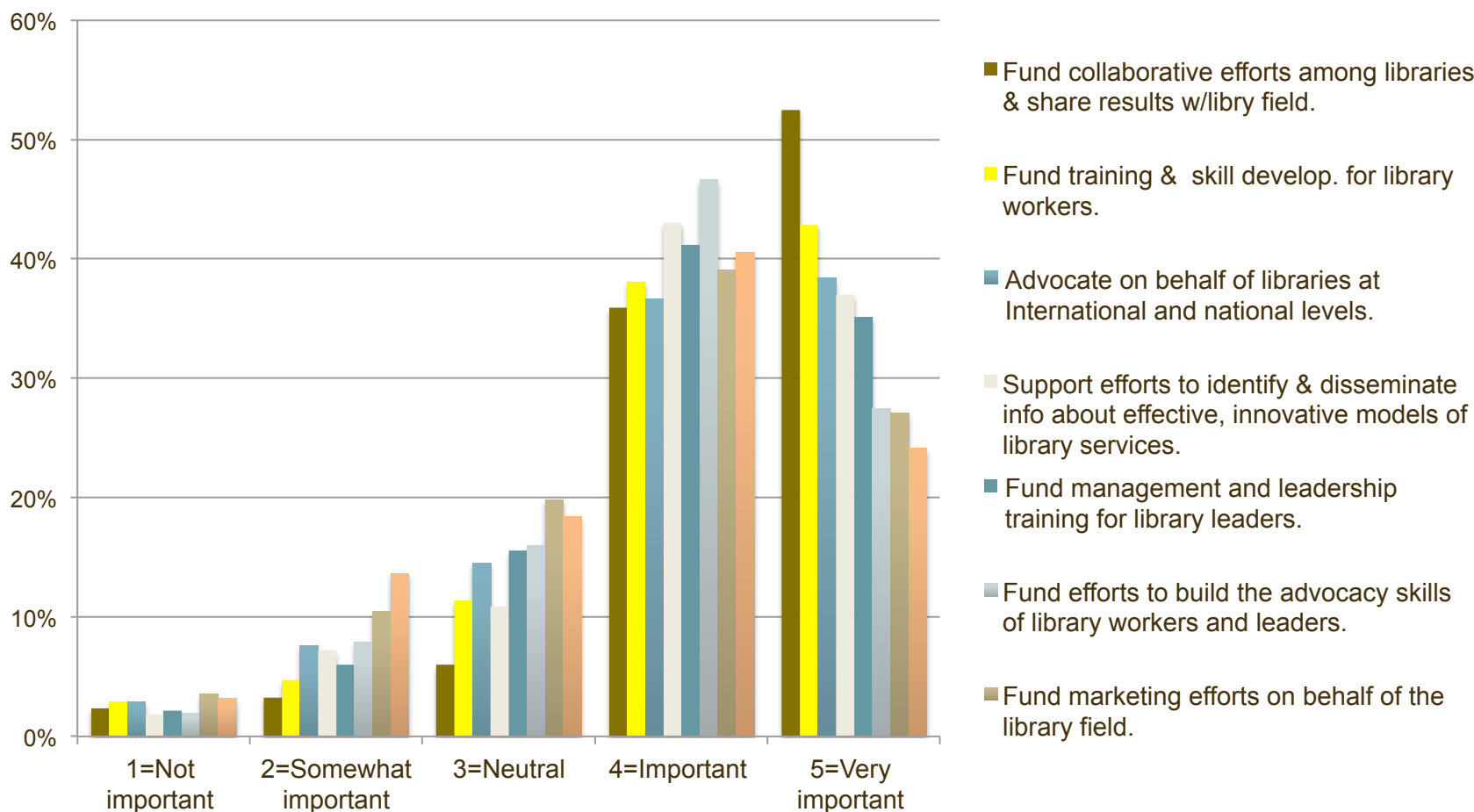


# Comparison of Responses

How important is each characteristic for a library's success in the future? <i>(Listed in order of how frequently each characteristic was listed as "very important to important.")</i>	Rank-order each characteristic in terms of its importance to a library's success in the future.
1. Library workers and leaders who embrace change.	1. Trained librarians.
2. Visionary, effective leadership.	2. Visionary, effective leadership.
3. Library workers & leaders with strong communications and advocacy skills.	3. Library workers & leaders with strong communications and advocacy skills.
4. Trained librarians.	4. Library workers and leaders who embrace change.
5. Community engagement.	5. Community engagement.
6. Partnerships with other organizations.	6. Partnerships with other organizations.
7. Appealing physical space.	7. Appealing physical space.

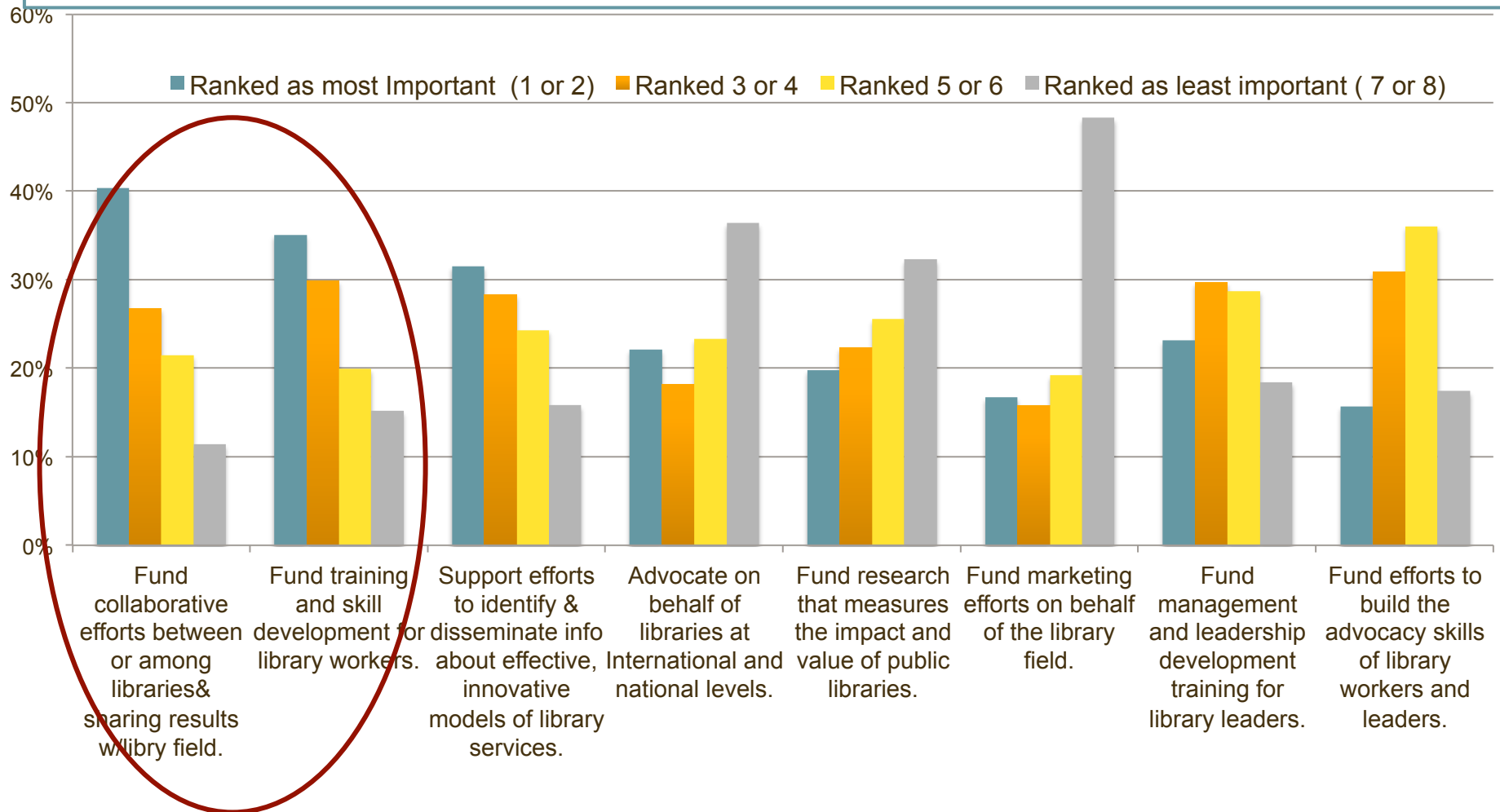
# Where should the Gates Foundation direct its future support?

- Most funding options were rated as “**very important**” or “**important**” to the success of future libraries, yet:
  - Funding **collaborative efforts** was rated much more frequently than all other options as being “very important” followed by funding **training and skill development for library workers**.
  - Approximately 7% of respondents offered additional suggestions in the “other” category with **funding technology** being the most frequently cited recommendation.



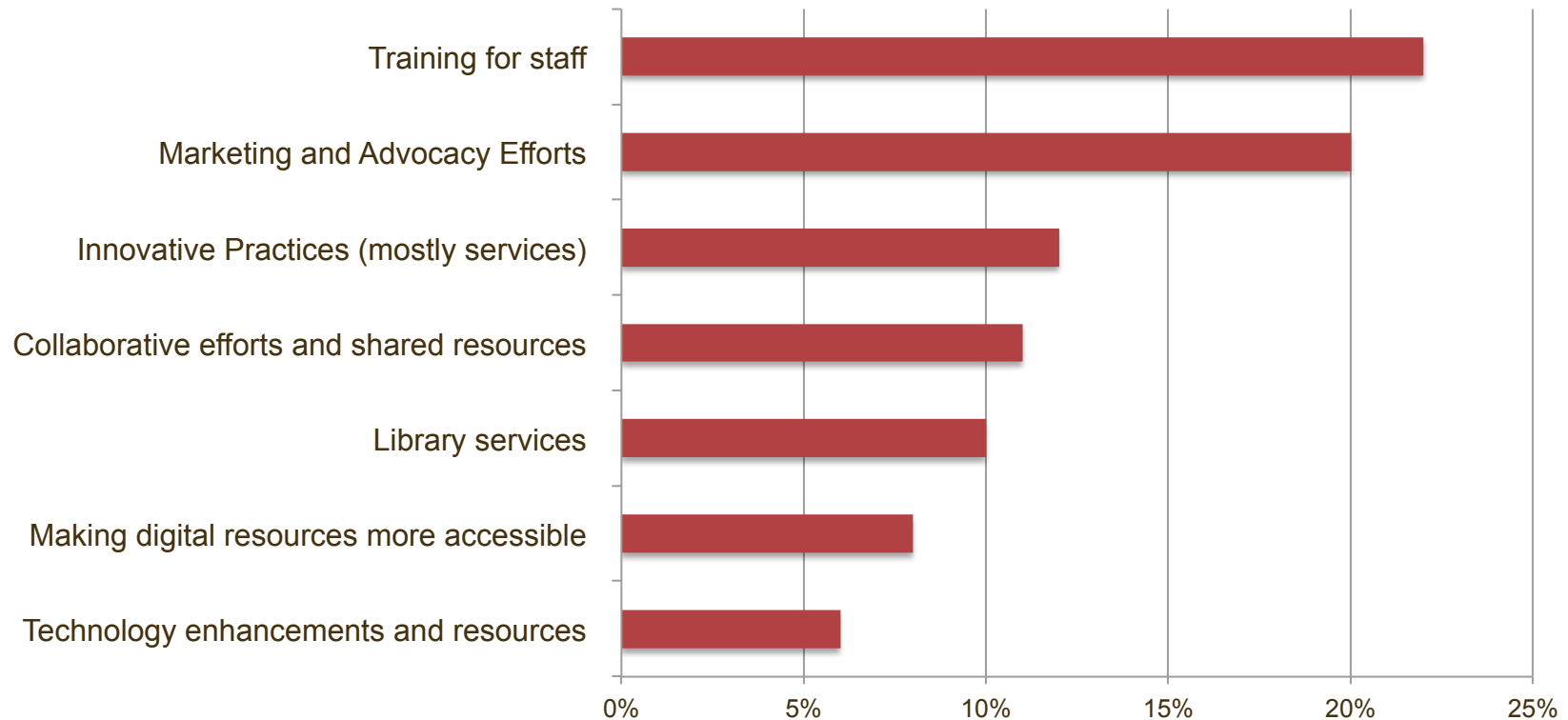
# Rank order recommendations for Gates Foundation future support

- When required to **rank order** their recommendations, there was no change from the previous question with funding for collaborative efforts and funding training and skill development for library workers remaining the top two recommendations.



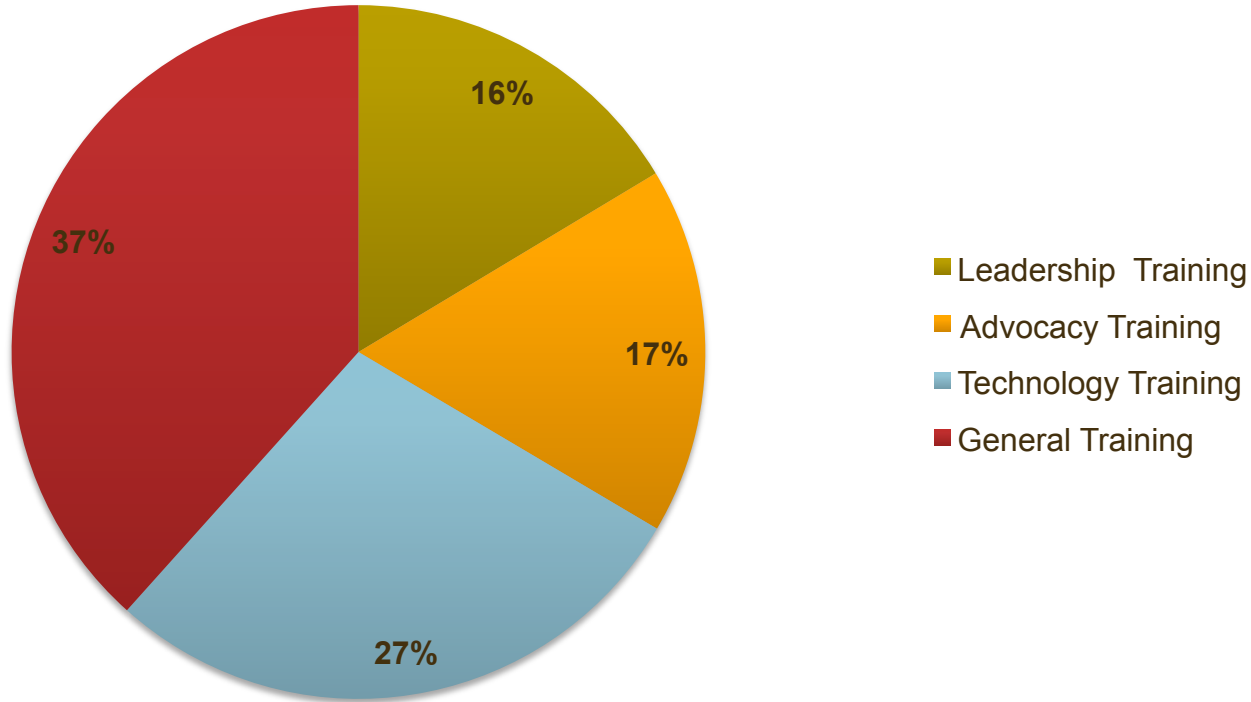
# If ONLY ONE recommendation to Gates for future library funding, what would it be?

- Responses varied from previous questions:
- **Training for staff** cited most frequently.
- **Funding for collaborative efforts** dropped to fourth from first place.
- **Advocacy** and **marketing efforts** both mentioned frequently in response to this question, though did not rank high on the list of funding priorities in the previous questions.



## What type of training for library workers do respondents recommend the Foundation consider supporting?

- Training for library leaders and workers was cited most frequently when asked to identify ONLY ONE area for Foundation support. Specific recommendations as to the type of training needed is summarized below:



# **Comparison of responses and areas of commonalities and differences...**

# What will be the role of the public library and how will it be different from the role of the public library now?

- It is interesting to note that a community center or gathering place was mentioned by a number of respondents as an important role of the future library. We can assume that this would require an appealing physical space, however, this characteristic was ranked as the *least important* when respondents rank ordered the characteristics that will enable a successful library of the future.

Most important characteristic for libraries' success in the future. (Listed in order of importance)	Role of the public library in the future (Listed in order of number of times mentioned)
Trained librarians	Help navigate and curate information
Visionary, effective leadership	A community center or gathering space
Engagement with community members to design and delivery library services	Provider of community programs and services
Library workers & leaders who embrace change	Provider of technology access and training
Library workers w/ strong communication and advocacy skills	Space for learning
Partnerships with other organizations	Bridging the Digital Divide
Appealing physical space	Provider of literacy program (including digital literacy)
	Libraries will remain the same

# Characteristics enabling the success of libraries versus what respondents think the Gates Foundation should support

- Funding collaborative efforts *among libraries* is cited as the the most important activity the Gates Foundation should support but partnerships with *other organizations* is considered as one of the least important characteristics needed for libraries' success.

Most important characteristic for libraries' success in the future. (Listed in order of importance)	Most important activity the Gates Foundation should support to help libraries succeed in the future. (Listed in order of importance)
Trained librarians	Fund collaborative efforts between or among libraries& sharing results w/library field
Visionary, effective leadership	Fund training and skill development for library workers
Engagement with community members to design and delivery library services	Support efforts to identify & disseminate info about effective, innovative models of library service
Library workers & leaders who embrace change	Advocate on behalf of libraries at International and national levels
Library workers w/ strong communication and advocacy skills	Fund research that measures the impact and value of public libraries
Partnerships with other organizations	Fund marketing efforts on behalf of the library field
Appealing physical space	Fund management and leadership development training for library leaders
	Fund efforts to build the advocacy skills of library workers and leaders

## Appendix A: List of Bloggers that Distributed the Survey Link

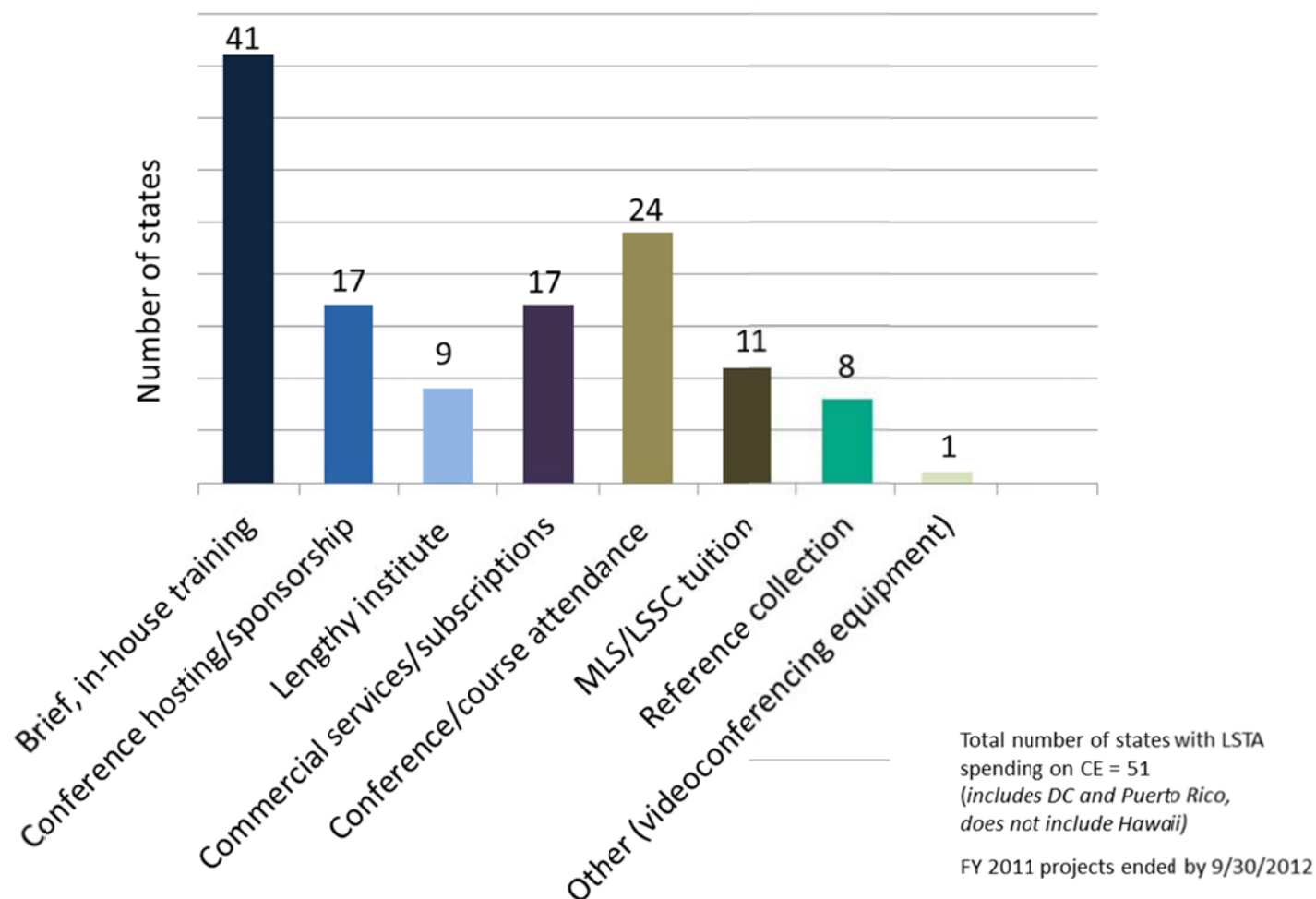
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Name of Blogger	Address of Site
Andy Poll	<a href="http://agnosticmaybe.wordpress.com/">http://agnosticmaybe.wordpress.com/</a>
Bobbi Newman	<a href="http://librarianbyday.net">http://librarianbyday.net</a>
Brian Herzog	<a href="http://www.swissarmylibrarian.net/">http://www.swissarmylibrarian.net/</a>
Brian Mathews	<a href="http://dbl.lishost.org/blog/">http://dbl.lishost.org/blog/</a>
David Lee King	<a href="http://www.davidleeking.com">http://www.davidleeking.com</a>
David Rothman	<a href="http://librarycity.org">http://librarycity.org</a>
Ellyssa Kroski	<a href="http://oedb.org/">http://oedb.org/</a>
Jessamyn West	<a href="http://www.librarian.net">www.librarian.net</a>
Kathy Petlewski	<a href="http://kpetlewski.wordpress.com/">http://kpetlewski.wordpress.com/</a>
Laurel Tarulli	<a href="http://laureltarulli.wordpress.com/">http://laureltarulli.wordpress.com/</a>
Richard Kong	<a href="http://www.richardkong.com/about/">http://www.richardkong.com/about/</a>
Rita Meade	<a href="http://www.screwydecimal.com/">http://www.screwydecimal.com/</a>
Sarah Houghton	<a href="http://librarianinblack.net/librarianinblack/">http://librarianinblack.net/librarianinblack/</a>
Steve Matthews	<a href="http://21stcenturylibrary.com/">http://21stcenturylibrary.com/</a>

# IMLS Grants to States Analysis

(IMLS)

## Selected IMLS Grants to States LSTA Spending on Continuing Education – FY 2011 By Number of States Pursuing Various Methods



Data comes from an analysis of 311 projects in the IMLS State Program Report (SPR) for the latest available year (FY 2011). Of this total, 277 noted “Staff Development and Training” as one of the primary services of the project; an additional 29 were identified through keyword searching (“continuing education”, “MLS”, etc.); and 5 were identified through browsing projects in states that were otherwise unrepresented. Below is additional context for each method:

**Brief, in-house trainings:** In person or webinar training generally lasting one day or less, with a target audience of library staff. Training could be part of a broader project (e.g., implementing e-readers, summer reading), and there are likely many more examples like this in the SPR. For this investigation, only projects identified in one of the three ways above were included. Trainings were generally conducted by state consultants, library staff, contract staff, and partners.

**Conference hosting/sponsorship:** In person or webinar training generally lasting several days, with a target audience of library staff. Expenses might include speakers, venue, technology infrastructure, materials, etc.

**Lengthy institute:** In person or blended training generally lasting more than one week, with a target audience of library staff. Expenses are similar to conference hosting.

**Commercial services/subscriptions:** Services/subscriptions purchased to facilitate continuing education. These included access to self-paced courses/webinars or tools used to manage in-house training programs (See p. 3).

**Conference/course attendance:** Paid attendance/travel to CE opportunities beyond in-house offerings, for individuals (or groups, in the case of one-time access to virtual training – ALA, PLA, etc).

**MLS/LSSC tuition:** Reimbursement for coursework leading to an MLS degree or Library Support Staff Certification.

**Reference collection:** Collection of print/electronic materials on professional development topics with a target audience of library staff.

**Other:** One state purchased videoconference equipment at host sites so nearby libraries could attend virtual training.

	Brief, in-house training (# of trainings)	Conference hosting/ Sponsorship (# of conf)	Lengthy institute (# of inst)	Training tools/ subscriptions (# of tools)	Sponsored attendance – conferences/ courses (# of people)	MLS/LSSC tuition (# of people)	Reference collection (# of collections)	Other
AK	3	2			103	2		
AL	1				2	11		
AR	19+			1				
AZ	84		2	1	32+	1	1	
CA	59	2	1	1	34+	88		
CO	75+						1	
CT	225			1			1	
DC					41			
DE	1							
FL	386		1	1	40			
GA	4			1				
IA			1	2				
ID		1		2	25	8		
IL		1		1				1
IN	multiple							
KS		1						
KY	148+				116+	26		
LA	58							
MA	35+	1						
MD	multiple		1	4	1			
ME	54							
MI	9	1			4	1		
MN	4							
MO	93	2						
MS	26+	1			484	4		
MT	129	1		1	3			
NC	2			2	208			
ND						3		
NE	139+	1			multiple			
NH		1			1			
NJ	1	1						
NM	2							
NV				4	6			
NY	450		1	6	21		2	
OH	9	1						
OK	62		1		39			
OR						15	1	
PA	49	2			62		2	
PR	15+							
RI	3+				1+		1	
SC	53				19	2		
SD	212		1					
TN	2			1				
TX	60+						1	
UT	4				11			
VA	30	1		1				
VT	10		1		2			
WA	61			3	64			
WI	4+							
WV								
WY	62	1						
<b>TOTAL</b>	<b>41 of 51 states (80%)</b>	<b>17 of 51 (33%)</b>	<b>9 of 51 (18%)</b>	<b>17 of 51 (33%)</b>	<b>24 of 51 (47%)</b>	<b>11 of 51 (22%)</b>	<b>8 of 51 (16%)</b>	<b>1 of 51 (2%)</b>

**Examples of training tools/subscriptions purchased with FY 2011 LSTA funds (by # of states):**

- WebJunction - 12
- Adobe Connect - 4
- Amigos - 4
- Lyris - 3
- Evanced - 2
- InfoPeople - 2
- LibGuides - 2
- WebEx - 1
- SurveyMonkey - 1
- BusinessDecision - 1
- Linworth Publishing - 1
- Symbaloo - 1
- SkillSoft - 1
- Maisie Online Learning Consortium - 1
- Moodle - 1
- Atomic Training - 1

## **IMLS LSTA Grants to States Program Investment in Continuing Education**

Between FY 2008 and FY 2010, \$9.8 million\* of LSTA Grants to States funds supported continuing education for library staff, trustees, and volunteers. On average, 30 states administered statewide services or subgrants that directly supported professional development. Continuing education activities included the design, development, and delivery of instructor-led or self-paced training on a variety of topics (see list of topics); attending local workshops and national conferences; purchasing equipment or licenses for virtual convenings; and funding scholarships or professional certifications.

\*Analysis of State Program Reports

## **Continuing Education Topics - IMLS Grants to States Five Year Plans 2013-2017**

51 states indicated general and/or specific need for continuing education. The “tags” below were extracted from the States’ five year plans. [http://www.imls.gov/programs/5year\\_plans.aspx](http://www.imls.gov/programs/5year_plans.aspx)

### **Services/Programs**

- Programming Support (9)
- Reference Services (3)

### **Services/Programs – Topics**

- “21<sup>st</sup> century skills” (2)
- Civic Engagement (4)
- Digital Literacy (9)
- Information Literacy (2)
- Emergency Response (1)
- Early Learning (3)
  - Literacy (15)
- Homework Help (1)
- Informal Learning (1)
- Learning Labs (1)
- Literacy (1)
- Parenting Education (1)
- Play (importance of) (1)
- Summer Reading (6)
- Workforce Development (8)

### **Collections - Activities**

- Acquisitions (1)
- Automation (2)
- Cataloging (2)
- Management of (4)
- Sharing of (7)
  - Interlibrary Loan (2)
- Digital Assets Management (1)
- Digitization (7)

- Disaster Preparedness (3)
- Preservation (1)

### **Collections – Topics/Format**

- E-government (5)
- Electronic resources (18)
  - Content Integration (1)
  - Customer Support (1)
  - Databases (4)
  - Delivery (1)
  - E-books (2)
- Genealogy (1)
- Health information (3)
- Legal Resources (4)
  - Library Laws (1)
  - Patent and Trademark (1)

### **Types of End-Users**

- Adults (2)
- American Indians/Native Americans (3)
- Diverse Populations (2)
- ESL (3)
- Blind/Visually Impaired/“special” populations (6)
  - Talking Books (2)
- Older Adults/Seniors (4)
- Youth (17)
  - Children (3)
    - Underserved (1)
  - Teens (4)
  - Young Adults (1)

### **Location-based Services**

- Correctional facilities (1)
- Out-of-school (1)
- School libraries (1)

### **Library Administration/Management**

- Government Relations (1)
- Grants Administration (6)
- Leadership Development (12)
  - Mentoring (1)
- Library Districts (1)
- Library Operations (15)
  - Controversial Issues (1)
  - Financial Management (2)
  - Governance (5)
  - Personnel (2)

- Policy Development (1)
- Library Resources (Training/Professional Materials) (23)
  - Communication Tools
  - Infrastructure Support (5)
  - Access to Local (“homegrown”) Training (2)
- Mentoring (2)
- Multicultural Training (3)
- Partnerships (3)
- Planning and Evaluation (12)
  - Community Needs (2)
  - Strategic Planning (2)
  - Subgrantees (1)
- Trends and Best Practices (6)

### **Library Infrastructure**

- CIPA (1)
- “Digital Inclusion” (2)
- E-rate (4)
- Hardware upgrades (1)
- Multimedia Tools (1)
- Network Management (7)
  - Cloud Computing (1)
- New/Emerging Technologies (14)
  - Apps/Gaming (1)
- Social Networks (3)
- Technology Training (14)
- Technology Upgrades (1)
- Telecommunications/Broadband (4)

### **Staff Competencies**

- Analytics – data collection/evaluation (5)
- “Basic” library skills (3)
- Certification (6)
- Research (1)
- Web Development (2)

### **Staff Types**

- Pre-professional (4)
- Trustees/Board Members (10)

# CE Coordinator Needs Assessment Summary

## (WebJunction)

July/August 2012

Through a **CE Coordinator Needs Assessment**, WebJunction sought to better understand the perspective of CE coordinators, trainers, and training managers on what training *they* think library staff need, as well as what *their own* needs are for delivering more effective training. The responses to this assessment provide a national perspective of current training needs, issues, and emerging trends from the perspective of the CE community. Responses to the survey were completed by 48 individuals.

In sharing these results with the CE community, WebJunction hopes to spark discussions and initiatives that lead to new training resources that are engaging and move library staff skills forward.

### Highlights of the results:

- The priorities for library staff training identified by CE trainers and managers aligned very well with the priorities identified in WebJunction's general member survey.
- Trainers and coordinators are using a variety of training approaches; they would like to be able to provide more quick how-to training, collaborative or learner-driven problem-solving, and in-depth skill development.
- In-person workshops are still the preferred format for delivering training to library staff, but live webinars and how-to videos are not far behind.
- The highest percentage of respondents selected "not enough staff time to take training" as the strongest barrier effective staff training; the second highest "strong barrier" is the "inability of staff to travel."
- To overcome identified barriers, respondents are most frequently applying new methods to motivate learners, trying new training methods, and looking for less expensive alternatives.
- When asked about their own training needs, the highest percentage of respondents chose "designing and delivering effective online training," followed by "designing and delivering a blended curriculum" and "new and emerging technologies."
- All respondents are either "very interested" or "somewhat interested" in trying out new training formats or strategies.

### Question 1: What is your position in the area of library training/learning?

CE Coordinator	56.7%
Training/Learning Manager	21.7%
Trainer	11.7%
Training Consultant	10.0%

A few respondents chose "other," indicating they are directors or in other coordinator or consultant positions.

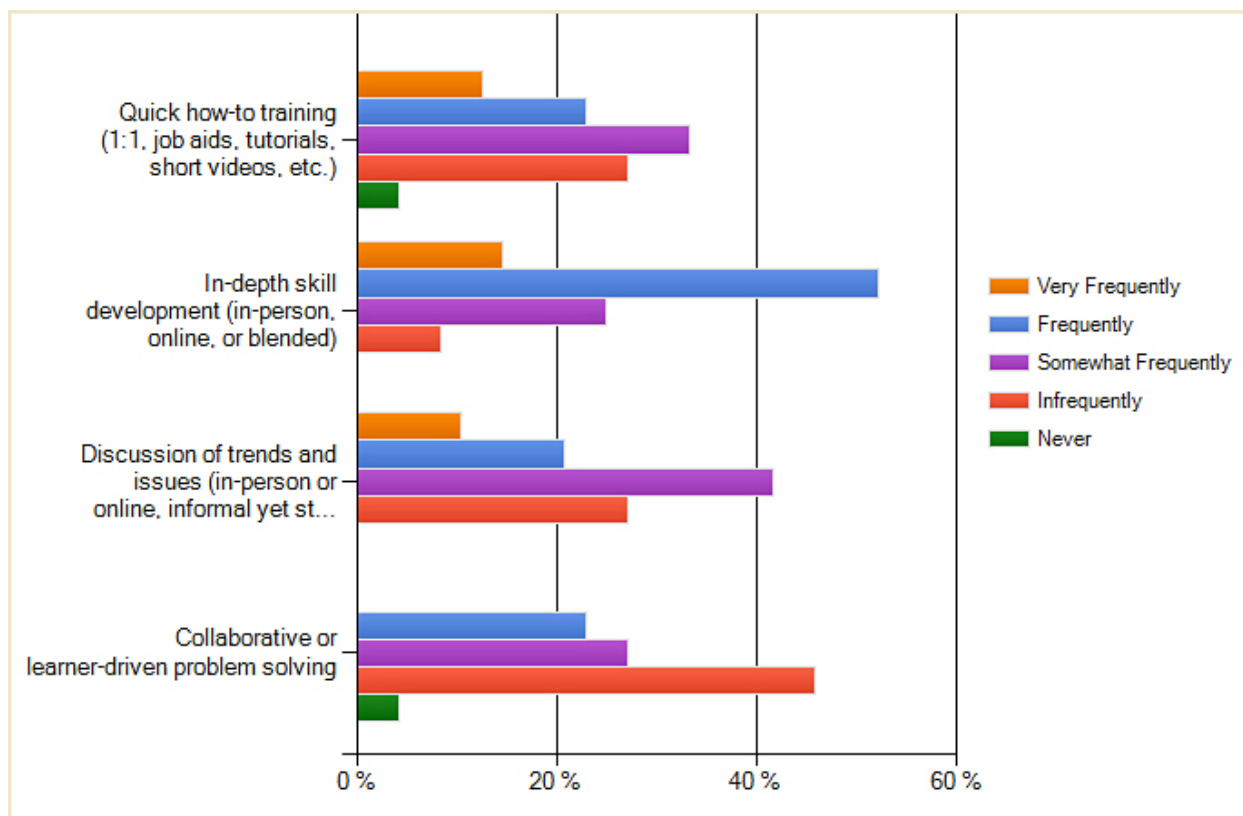
## Section 1: Training for Library Staff

**Question 2: For each of the 25 skill areas listed below, how would you prioritize library staff's current need for training?**

Answer Options	Low	Medium	High
How to adapt to change in job and profession	3	13	32
Providing excellent customer service	2	17	29
Advocating for the library	5	15	28
Choosing and using e-readers	2	20	26
Forming partnerships and collaborating with organizations	3	19	26
Improving communication with patrons and coworkers	2	23	23
Developing and managing electronic collections	3	22	23
Strategic planning and setting goals	5	22	21
Securing funding and doing the budget	9	20	19
Hiring, training, managing staff	4	26	18
Outreach to underserved populations	4	27	17
Using social networking sites and other Web tools	8	24	16
How to teach patrons basic skills	6	26	16
Developing or improving programs for patrons	2	30	14
Providing services to job seekers	7	28	13
Providing services to young adults/teens	8	27	12
Providing services to children	7	30	11
Improving Internet and Web skills	7	30	11
Maintaining public computers	12	26	10
Reference skills	6	33	9
Using ILS & library databases	13	27	8
Using common software and Office applications	17	23	8
Designing the library website	17	23	8
Library technical services, such as cataloging	19	21	8
Searching for government information	19	24	5

The largest percentage of respondents (67.7%) chose “how to adapt to change” as the highest priority for library staff training, followed by “customer service” (60.4%) and “advocating for the library (58.3%). Ratings indicate that the lowest priorities for staff training are “searching for government information” (39.6%), “library technical services” (39.6%) and “using common software and office applications” (35.4%). It should be noted, however, that all of those garnered between 44-50% ratings as a medium priority.

**Question 3: How frequently are each of the following training approaches used for staff training in your state or region?**



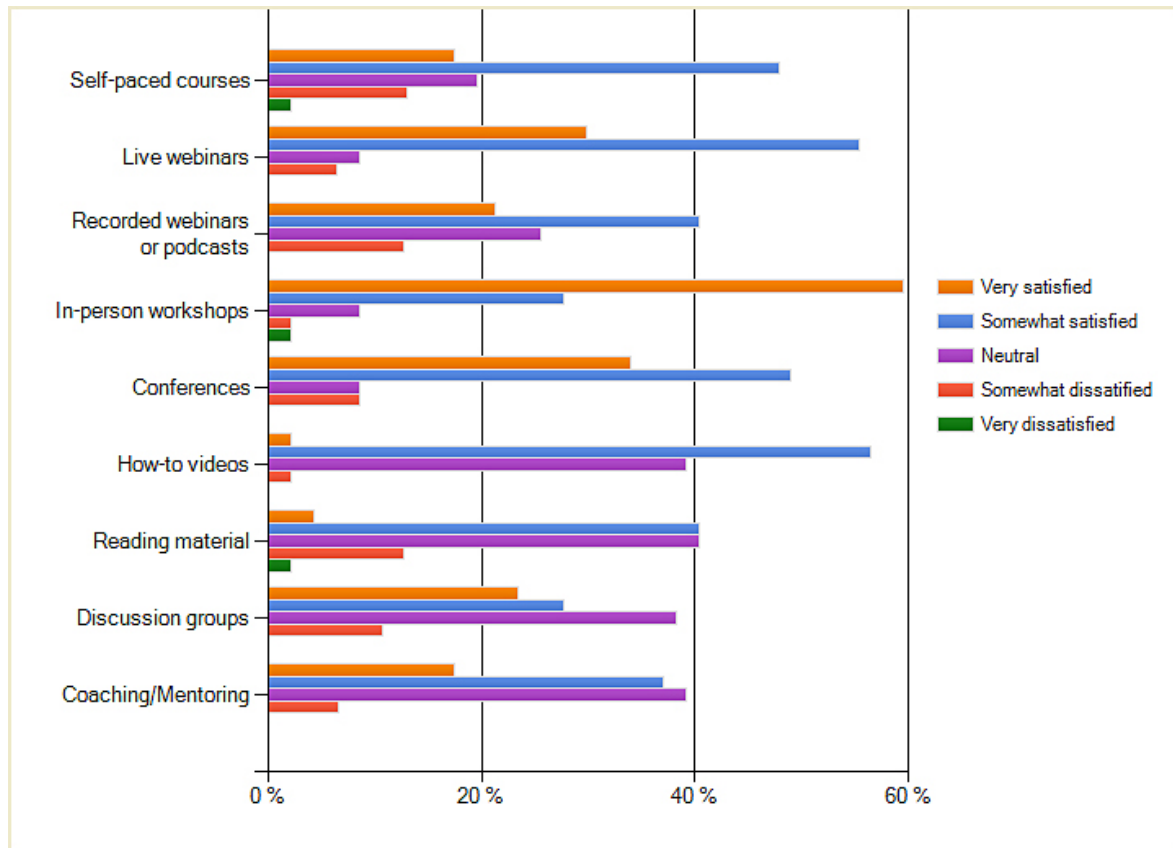
**Question 4: Of the approaches to training listed in question 3, which would you like to do more of?**

Quick how-to training (1:1, job aids, tutorials, short videos, etc.)	11
Collaborative or learner-driven problem solving	9
In-depth skill development (in-person, online, or blended)	8
Blend of more than one approach	6
Discussion and collaborative problem solving	4
Discussion of trends and issues (in-person or online, informal yet structured)	4

A few respondents elaborated on their preferences for training approaches:

- “In-person opportunities still seem to be the ones that really “stick” with participants. I’d like to see those offered as much as is financially possible, especially in the soft skill areas that don’t translate as well to the online learning format.”
- “All of them. We still do a little too much ‘see if the spaghetti sticks.’”
- “Learner driven, more creative approaches to elearning. Take a risk! Less formulaic and boring.”

**Question 5: How satisfied are you with the following training formats for delivering effective training to library staff?**

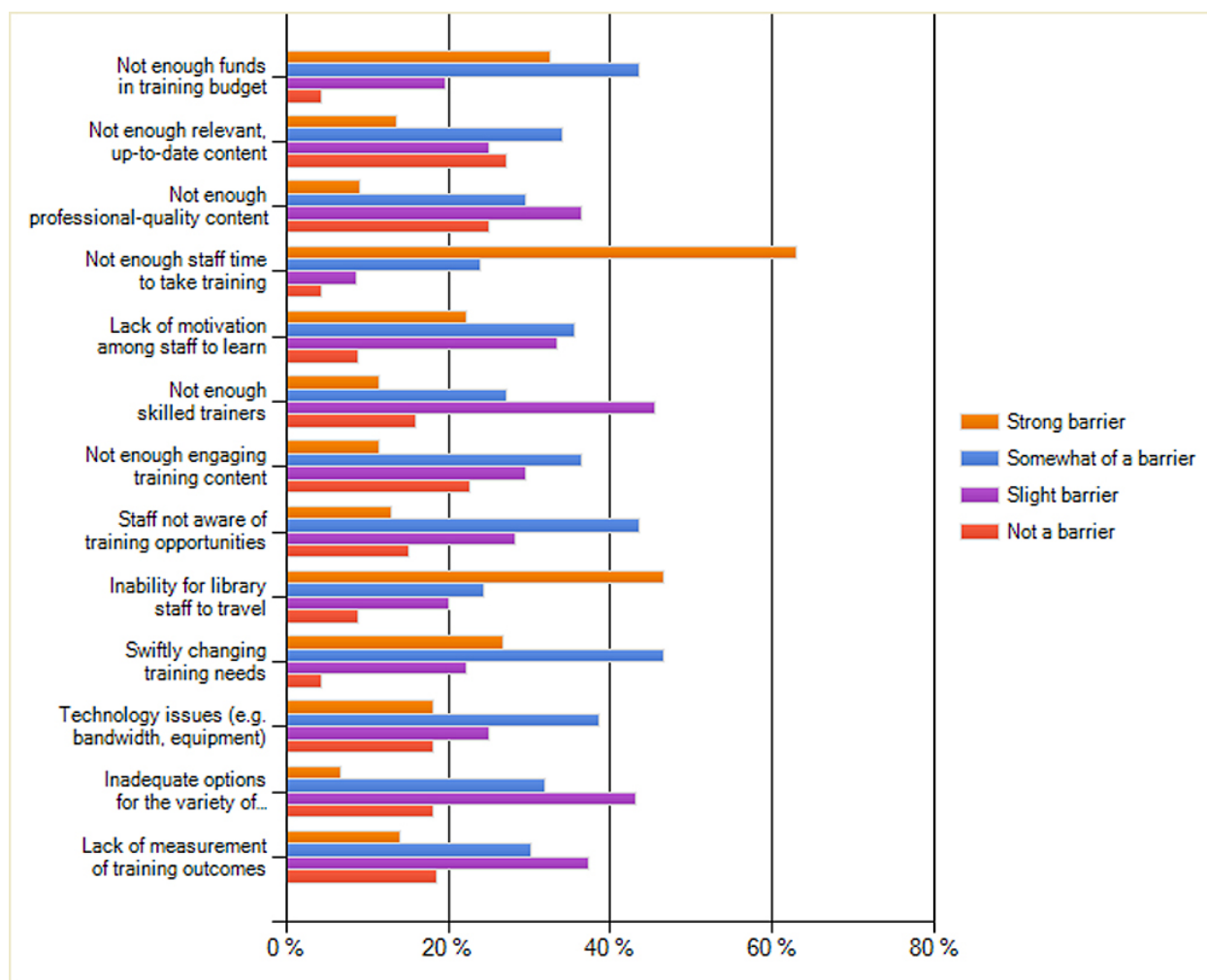


With a ranking of 59.6% “very satisfied,” in-person workshops are the leading preference for delivering staff training. If the responses for “very satisfied” and “somewhat satisfied” are combined, the choice of “live webinars” comes up strong with 85.1%, along with “conferences” at 82.9%. Self-paced courses may not be a strong first choice, but they garner a respectable 47.8% in the “somewhat satisfied” rating.

**Question 6: What are the top factors that contribute to your satisfaction with training for library staff? (Select up to 3.)**

Quality of instruction	78.7%
How much it costs	40.4%
How engaging the format is, level of interactivity	40.4%
Fit of topic to training plan	38.3%
Convenience of format	25.5%
Feedback from learners, surveys	25.5%
Outcomes evaluation, library user feedback	25.5%
How up-to-date the content is	19.1%
Reporting (e.g. test scores, completion rates, pre/post-assessments)	2.1%
Relationship with content provider (vendor, organization, consultant)	0.0%

**Question 7: To what extent do you see the following as barriers to effective training in your state or region?**



By far, the strongest barrier identified is “not enough staff time to take training” (63.0%). The second highest “strong barrier” is the “inability of staff to travel” (46.7%). However, if the “strong barrier” and “somewhat of a barrier” responses are combined, “not enough funds in training budget” shows up as significant with 76.1%, along with “swiftly changing training needs” at 73.4%.

An additional comment speaks to the importance of administrative buy-in:

- “I think the more a library's administration WANTS training to happen, the fewer & smaller the barriers suddenly become. They find a way.”

**Question 8: How are you currently working to address any of these barriers? (Check all that apply)**

Applying new methods to motivate learners	65.2%
Trying new training formats that are more effective for staff	60.9%
Looking for less-expensive training solutions	58.7%
Improving interactivity and engagement with learners	45.7%
Addressing technology issues (e.g. bandwidth, equipment)	45.7%
Replacing low-quality or out-of-date content	43.5%
Improving marketing efforts	43.5%
Training new trainers or pursuing training for self	39.1%
Working with libraries to increase time for staff training	32.6%
Advocating for increased training budget	23.9%
Addressing staff travel policy	8.7%

Additional comments elaborate on options for addressing barriers:

- Developing new programs
- Our approach has been JIT (Just In Time) training on strategic initiatives that we're implementing, such as the [statewide] Library Catalog, eBooks, etc. Once all of the infrastructure initiatives are in place, then we can develop the "new normal" of ongoing training. In the meantime we've been dependent on our very generous scholarship loan program (Masters, Bachelors, Doctorate) for routine professional development.
- Always looking for new trainers and topics
- We provide scholarships and travel reimbursement when possible. We are also doing more online to save time and costs.

**Question 9: How often does your state or region conduct some form of assessment for the continuing education needs of library staff?**

At least annually	28.3%
1-3 years	28.3%
3-5 years	15.2%
5-7 years	4.3%
Rarely or never	23.9%

Almost one quarter of respondents are in states or regions that rarely or never conduct library staff training needs assessments.

**Question 10: Which of the following was used when your state or region last conducted a training needs assessment? (Check all that apply)**

Survey results from your state or region	89.7%
Input from library directors	56.4%
Interviews with library directors, library staff, and/or library users	48.7%
Environment scan	35.9%
Direct observation	30.8%
Competencies	28.2%
Research results by other organizations (national or regional)	20.5%
Literature review	17.9%
Looking at model libraries	12.8%
Outside consultant	12.8%
Review of job descriptions	0.0%

Additional comments:

- “Broadband Training Opportunity Program/BTOP Coordinators interviewed library directors about job training for librarians”
- “As far as I know, there hasn't been a state-wide initiative. I've surveyed my member libraries in the past.”

**Question 11: Is your most recent needs assessment posted online for others to read?**

- <http://www.olis.ri.gov/pubs/ceoverview2010.php>
- <http://statelibrary.ncdcr.gov/ld/education/07CEReport.pdf>
- <http://library.utah.gov/programs/training/index.html> "Training needs assessment results" (bottom of page)

## Section 2: Training for Trainers

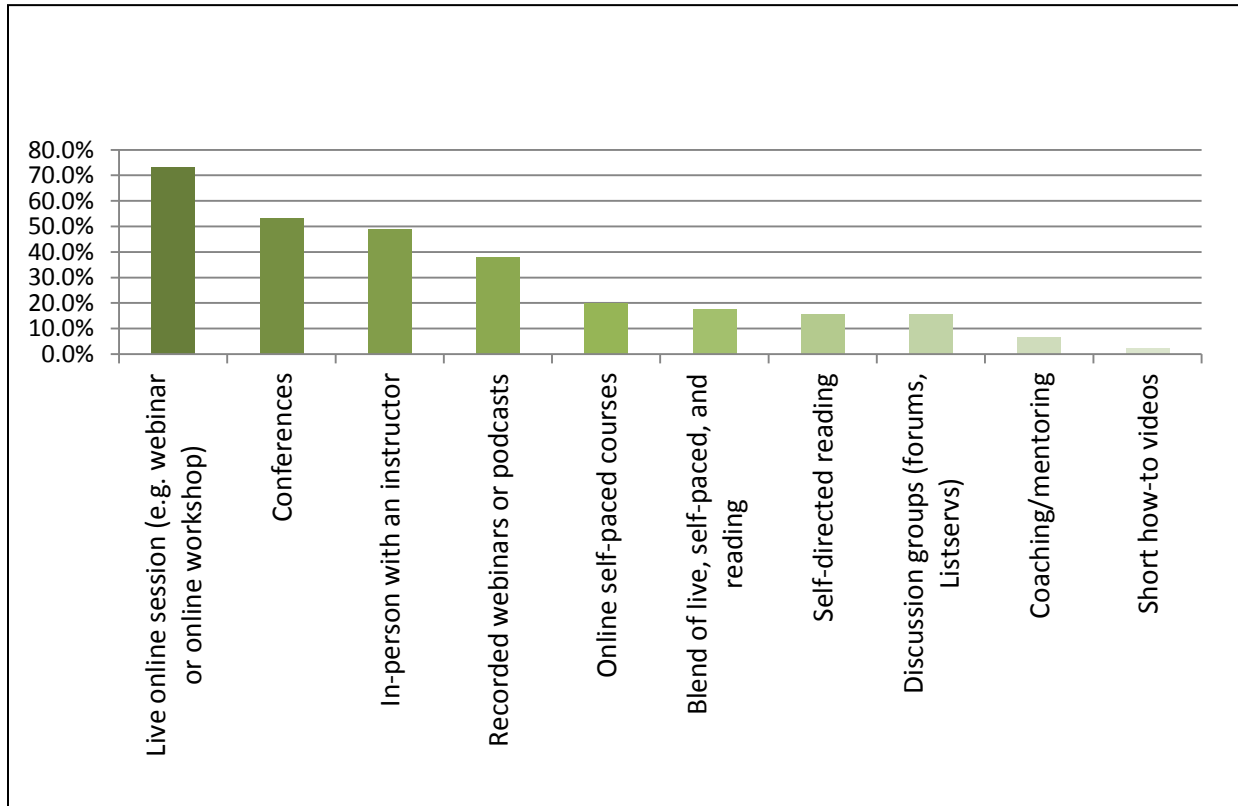
**Question 12: For each of the 19 skill areas listed below, how would you prioritize current needs for *your own* training? (Aggregate prioritized)**

Answer Options	Low	Medium	High
Designing and delivering effective online training	8	11	<b>25</b>
Designing and delivering a blended curriculum	6	16	<b>22</b>
New and emerging technologies	8	<b>18</b>	<b>18</b>
Evaluating training programs and assessing learner outcomes	10	18	<b>16</b>
Strategies and methods for increasing learner motivation and interactivity	6	<b>21</b>	16
Designing and conducting training needs assessments	11	<b>17</b>	16
Strategies and methods for fostering learner collaboration and personal responsibility	3	<b>25</b>	15
Helping library staff adapt to change	13	<b>16</b>	15
Basic instructional design skills	11	<b>20</b>	13
Using mobile apps for training	12	<b>19</b>	13
New and emerging library services	6	<b>26</b>	12
Partnership and collaboration	15	<b>18</b>	11
Getting the most out of just-in-time learning	15	<b>19</b>	10
How to coach/mentor and facilitate peer learning	14	<b>19</b>	10
Using social media and other marketing tools	<b>20</b>	18	6
Understanding how we learn (brain models, etc.)	16	<b>23</b>	5
Advocacy skills	18	<b>21</b>	5
Presentation skills (speaking style, nonverbal communication, etc.)	<b>24</b>	15	5
Interpersonal skills and attitudes	<b>22</b>	19	3

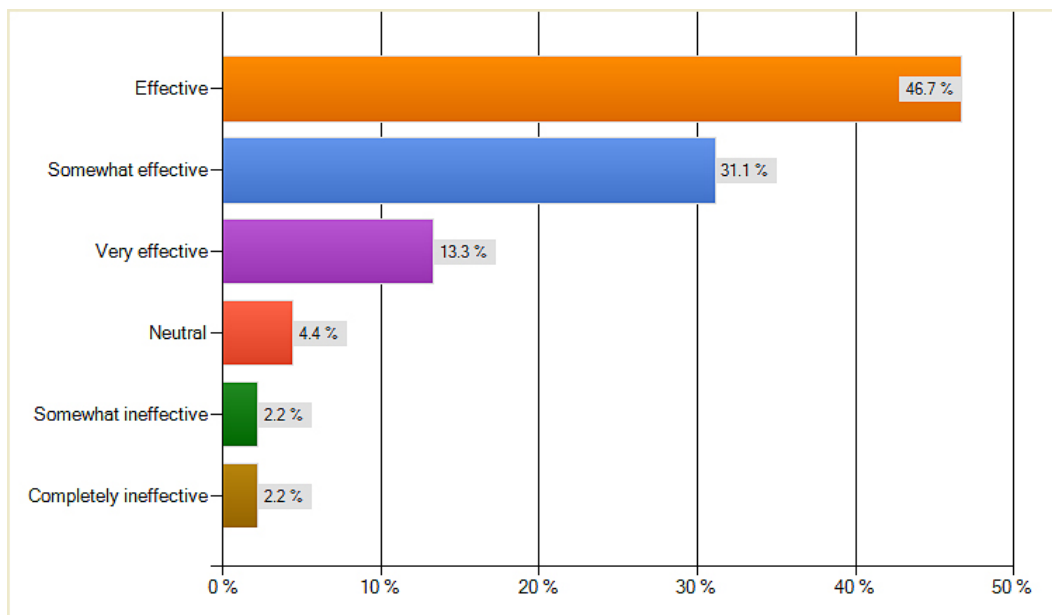
The largest percentage of respondents (56.8%) chose “designing and delivering effective online training” as the highest priority for their own training, followed by “designing and delivering a blended curriculum” (50.0%) and “new and emerging technologies” (40.9%). Combining responses for “high” and “medium” brings “strategies for increasing learner motivation” (86.3%) and “strategies for fostering learner collaboration” (93%) higher on the priority list.

Ratings indicate that the lowest priorities for training are “presentation skills” (54.5%), “interpersonal skills and attitudes” (39.6%), and “using social media” (45.5%).

**Question 13: Over the past 12 months, in what format has your training *primarily* been?**  
(Select up to 3)



**Question 14: How would you rate the overall effectiveness of this training, in terms of increasing your skills?**  
(Note: there were 0 responses for “ineffective” and “received no training.”)



**Question 15: How interested are you in trying out new training formats or strategies?**

Very interested	62.2%
Somewhat interested	37.8%
Neutral	0.0%
Somewhat disinterested	0.0%
Not at all interested	0.0%

**Question 16: What emerging training trends or formats are you most interested in?**

- Blended Learning (7); variations noted below:
  - How to be able to move from in person to online to blended, AS NEEDED based on each learning situation. Developing a more fluid, flexible approach to training delivery formats.
  - Blended learning -- effectively combining various formats -- while including appropriate incentives for completion.
  - blended, webinars that are interesting, skype type visits
  - Blending Interactive online with online self-paced online.
- Online webinars/workshops/courses (7); variations noted below:
  - Podcasts
  - Making live online session more interactive. (2)
  - How to develop quality self-pace online courses and tests.
  - Online self-paced courses; primarily how to get people to stay engaged in them. I don't personally care for them - it's the last thing on my own to do list - but I love creating them and wonder how I can be sure others are engaged and participating.
  - Online Mentoring
- Video (6)
  - Short how-to videos
  - Videos for learning
- Just-in-time, job aids (2)
- Using social media for training (2)
- Simulation
- Discussion groups with an instructional component, as a sort of virtual seminar.
- Using sites like Skillshare and Learn.ist. Creating my own modules for staff orientation and training.
- Anything that promotes interactivity, accountability, outcomes-based assessment
- For myself, in-person, conference and coaching trainings work best with my learning style.
- Designing needs assessment tools
- Proactive competency building

- Mobile learning, multimedia development

# Running the River of Lifelong Learning

(WebJunction)

[February 5, 2013, article](#) authored by WebJunction staffer Betha Gutsche that summarizes some of our investigation into trends in learning, with references to our interactive workshops at the 2012 CE Forum and 2013 ALA Midwinter.



[Photo: Study group by UBC Library on Flickr]

As libraries transform themselves to meet evolving needs, it is the people who work in libraries who are at the confluence of societal forces and who must act as the actual instruments of change. Change is a fast-flowing current. Though its swiftness may feel daunting, we need to find vehicles to support a continual effort to stay afloat and informed. If we don't want to get stuck in stagnant side pools, we all have to jump in to the river of lifelong learning.

Ideas about training and learning are also evolving. Increasingly, old notions and traditions are challenged in the light of new understanding about how the brain works and experiments in new educational strategies. With staff training high on the list of

imperatives in many a library strategic plan, the new approaches have implications for adult learning, for how library staff are trained, or more significantly, for how they learn. Beyond defining competencies and training needs, it is crucial to ignite the motivation to learn, to get all library staff to embrace their own sustained plunge into lifelong learning.

## Cracking the Motivation Myth

In his book [Drive](#) (and [TED talk](#)), Daniel Pink tackles this standard myth: "If you reward something, you get more of the behavior you want. If you punish something, you get less of the behavior you don't want." Studies at places like MIT, University of Chicago, and Carnegie Mellon have all exposed the fallacy of this notion, replicating over and over the finding that for tasks that call for even rudimentary cognitive skill, "a larger reward leads to poorer performance."

The extrinsic reward and punishment system—carrot-and-stick approach—is pandemic. Many organizations tie learning goals to performance evaluation, expecting that employees will strive for positive results and potentially higher pay, or act out of fear of losing a job altogether. This may seem to work on the surface but the learning may be minimal and superficial, not the kind of learning that leads to expansive thinking and transformation for the organization. Sometimes gifts of various sizes are offered as learning incentives. One library director gave all of his staff iPads, which they could take home for personal use; he was disappointed and mystified when many of them showed little curiosity about the new devices. In another example, a training manager exclaimed in frustration, "I offered my staff \$10 Starbucks cards if they would complete a simple tutorial. Only one person went for it. Why is that?"

Pink, backed by a host of studies, would say it is because people are not horses performing for carrots and fearing sticks. People respond to intrinsic (internal) motivations. Let's take a closer look at the three key ingredients of genuine motivation identified by Pink— autonomy, mastery, and purpose.

## Autonomy: Learning Like a Baby

Dr. John Medina is a molecular biologist, whose fascination with brain science led him to publish *Brain Rules* (book and [website](#)), a summary of 12 things scientists now know for sure about how our brains work. Rule #12 is particularly intriguing for thinking about how to design training for autonomy: “We are powerful and natural explorers.” We have been learning since birth. Babies are not expected to sit passively and listen to lectures (except for those subjected to Baby Einstein videos). They are encouraged to explore their environment, to experiment and fail, and try again and again. Exploration breeds curiosity to explore even more. Learning is an adventure. It doesn’t become a task until a child enters the traditional classroom.

Adults generally retain a deep sense of curiosity and urge to explore, though admittedly it may not be focused on things pertaining to gainful employment. Our brains are [wired for lifelong learning](#) so that we can continually adjust to a complex and changing world. Google supports the luxury-liner version of workplace autonomous exploration with its 20 percent time policy, which allows employees to spend 20% of paid work time to pursue whatever they like as long as it is Google-related. This policy seems unattainable in the library world. The challenge is to tap into adults’ natural curiosity and allow for autonomy in a way that still accommodates the relentless demands of staff scheduling and furthers the organization’s goals.

### *Autonomy strategies:*

- **Self-designed learning**

Set parameters of what is important to know in order to align with the library’s goals and to do a job well. Then allow staff to design their own paths to achieving the desired learning outcomes. The Toole City Library (UT) [Self-Directed Achievement](#) program transformed staff motivation to learn by asking them to set one training goal of their choice per week that can be achieved in one hour. The Whatcom County Library System (WA) offers a “Be Curious” Card to every staff member, which entitles them to take 1 hour/quarter out of their regular hours to learn something new of their choosing, something not required on a learning plan.

- **Personalization and the Flipped Classroom**

The [Flipped Classroom](#) strategy is a hot topic in K-12 education. It flips the traditional structure of in-class lecture and out-of-class homework. Students are assigned to watch an instructional video at home (either teacher-created or sourced elsewhere) for the lecture component. Back in the classroom, students work in groups to apply their learning (the “homework” piece). As a result, the teacher is freed to be more guide-on-the-side rather than sage-on-the-stage, and students receive more individualized attention. This strategy has direct application to face-to-face training in the library. It could also be applied to online training. Identify a cohort of learners, ask them to view a video or self-paced course on their own, and then bring them together to discuss the content and apply it to their work situations.

- **Digital badges**

Mozilla’s [Open Badges](#) project makes it possible for anyone to create, earn, and display digital badges as a visual, online recognition of achievements. Collecting badges to show off to supervisors or peers may seem like an extrinsic reward strategy. But think about all the former boy scouts and girl scouts you know who still speak with pride about the badges they earned and the levels they attained. There is something intrinsically fulfilling about the system. It becomes more game-like than performance requirement-like. YALSA (Young Adult Library Services Association) is [experimenting with digital badges](#) to stimulate learning and achievement with their members. By means of this simple and fun scheme, their goal is to improve teen library services throughout the country, which in turn empowers teens to lead more productive lives. It is worth watching the development of this inventive approach.

What these strategies have in common is that they have boundaries and structure. Autonomy does not equal anarchy. The learning is carefully choreographed to meet the organization's needs for training while also meeting the learners' needs for independent exploration.

## Mastery: Building Confidence and Competence

[Photo: Experienced library trainers Melissa Powell, [Biblioease](#) (CO), and Maurice Coleman, Harford County (MD) Public Library, at ALA Midwinter 2013; photo by B Gutsche]



We all want to master a new challenge right away, avoiding the slow, discouraging, and potentially embarrassing route to acquiring new skills. It rarely works that way. But people do doggedly pursue increasing levels of mastery in their hobbies, whether it's sports, musical instruments, crafts, gaming, etc. When the motivation to learn comes from within, they find positive reinforcement in small increments of improvement, and they have fun in the process. The question is how to transfer this kind of personal drive to the work environment, how to make workplace learning more accessible, compelling and even fun.

### *Mastery strategies:*

- **10-minute chunks**

Another brain rule from Dr. John Medina has to do with attention: "Audience attention drops precipitously at about 10-minute intervals. You must do something emotionally relevant at least every 10 minutes to regain attention." It is the curse of many a subject matter expert or teacher to attempt to load as much information as possible into the allotted period of instruction. Although it may seem like a good idea to turn on the fire hose of information, it actually overloads the brain and undermines the receiver's ability to absorb the knowledge. If you have one hour designated for training, trim the content and break it up into 10-15 minute chunks. Maximize attention within the chunks by clear identification of core concepts, connection of the concepts to what learners already know, and repetition of the concepts throughout the hour. Recognize the value of a 10-minute (or less) training opportunity. Watching a short video or tutorial may not even feel like training and it may be more effective to meet a just-in-time learning need.

- **Peer tutoring**

It isn't always the experts who make the most effective teachers. One library was struggling with staff members whose fundamental computer skills were just not showing the improvement they needed for job competency. Tech-savvy staff members and volunteers tried repeatedly to conduct classes and instill essentials skills. The breakthrough came when the library decided to use the "C" students as peer tutors, that is, other staff members who were just a couple of notches higher on the technology learning curve. It turned out that these tutors had a better understanding of the hurdles faced by their peers, in addition to feeling genuine empathy for the difficulty of the challenge. Not only did the struggling learners advance, the need to teach someone else caused the peer tutors to solidify their own understanding, which resulted in advancing their skills as well.

- **Collaboration is a game strategy**

Gamification is an increasingly popular idea, one that applies game-thinking and game mechanics to non-

game contexts in order to engage users and solve problems. In [Game-Like Qualities](#), Mary-Scott Hunter of Allen Interactions suggests that collaboration is often overlooked as an element of game play. Pair people up to learn together or design training so that coworkers need to seek each other out to fill in gaps in their knowledge. One information literacy instructor felt that her students were bored by the information-seeking assignments until she restructured the assignments to be done in teams in collaborative, scavenger hunt format.

- **Fail forward**

Gamers know that failure is part of the game—not just necessary but productive. An avid gamer recently exclaimed, “This new game is great. The more I fail, the faster I learn!” But in traditional training settings, students fear failure, fear looking stupid. In thinking about ways to make failure more fun, the [choose-your-own-adventure](#) children’s books provide an intriguing model. The stories are a series of scenarios for which the reader can choose a variety of outcomes, turning passive reading into an interactive, thought-provoking learning path. The learner is much more likely to remember her ill-advised choices when the outcome is being eaten by a shark or buried in an avalanche. Imagine customer service training delivered in this fashion.

## Purpose: Making a Better World

“People are natural purpose maximizers, not only profit maximizers,” Pink claims. “The companies that flourish are animated by purpose.” As utopian as it sounds, humans do aspire to higher purpose. We derive deep satisfaction from feeling part of something greater and loftier than ourselves. Educator [Will Richardson](#) recommends that we need to “support learners in doing work that is worthy of, can exist in, and can change the world.”

Libraries are in a prime position to capitalize on the intrinsic motivation of a sense of purpose. Many people working in libraries were drawn to the field precisely because of its greater purpose in a democratic society. There is an inherent passion for and emotional connection with the vision and mission of libraries. When staff members connect their incremental learning goals to the greater social good to which their work contributes, the training acquires meaning. Learning a new ILS system fuels the library’s purpose just as much as learning to advocate with elevator speeches.

## Leaping the Hurdles of Established Practice



[Photo: a 12-foot long graphic of a river is covered with a flow of post-it ideas about motivation and learning strategies. The ideas were generated at *Taking a New Look at Training and Learning*, a highly interactive session of discovery at ALA Midwinter 2013, hosted by WebJunction. See [http://www.webjunction.org/documents/webjunction/River\\_New\\_Learning.html](http://www.webjunction.org/documents/webjunction/River_New_Learning.html)]

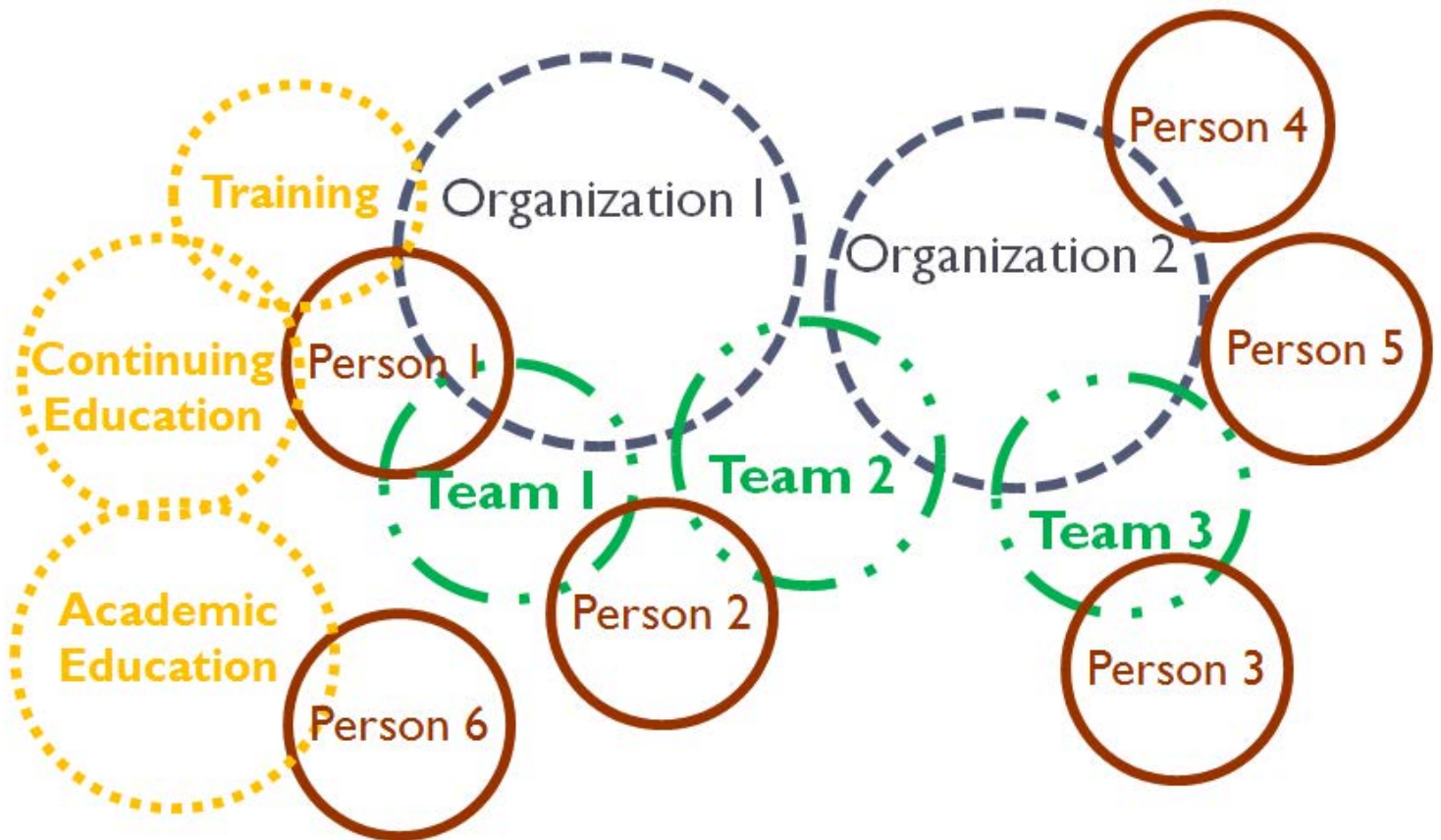
Intrinsic motivational strategies are learner-centric; the learner assumes a large share of responsibility for what and how they learn. For all of us who were schooled in the “brain dump and regurgitation” method of teaching, the shift arouses anxieties. In a recent thought-provoking discussion on the role of teachers and students, the objection was raised that students might not welcome the increased responsibility. There was a sense that, at least in academic settings, the students are paying to attend classes in order to be taught. “They are not here to teach you [the teacher].” For the teacher, discomfort comes from letting go of authority and trusting students to direct themselves; allowing learning to flow both ways undermines traditional roles as the expert source of knowledge.

The introduction of intrinsic motivational strategies does not let teachers/trainers off the hook. In fact it requires more thoughtful preparation and ongoing involvement as the supporting agent for the learners’ exploration. Rather than abandon the teacher’s knowledge and expertise, active facilitation of learning leverages it. “Through that process of facilitation, I need to be open to learning, but I also need to apply my expertise, skills and new approaches that best help my students/learners gain the most they can,” Zola Maddison observes. “Just because students say that they don’t want to be actively involved in their learning process, doesn’t mean we shouldn’t apply those approaches. I’m sure if you asked them, students wouldn’t want to take final exams either.”

In the spirit of our innate urge to explore, all of us at every level and position within the library field should wade into the river of lifelong learning. We’ll find most of our colleagues running alongside, devising new and novel ways to stay on top of the flow.

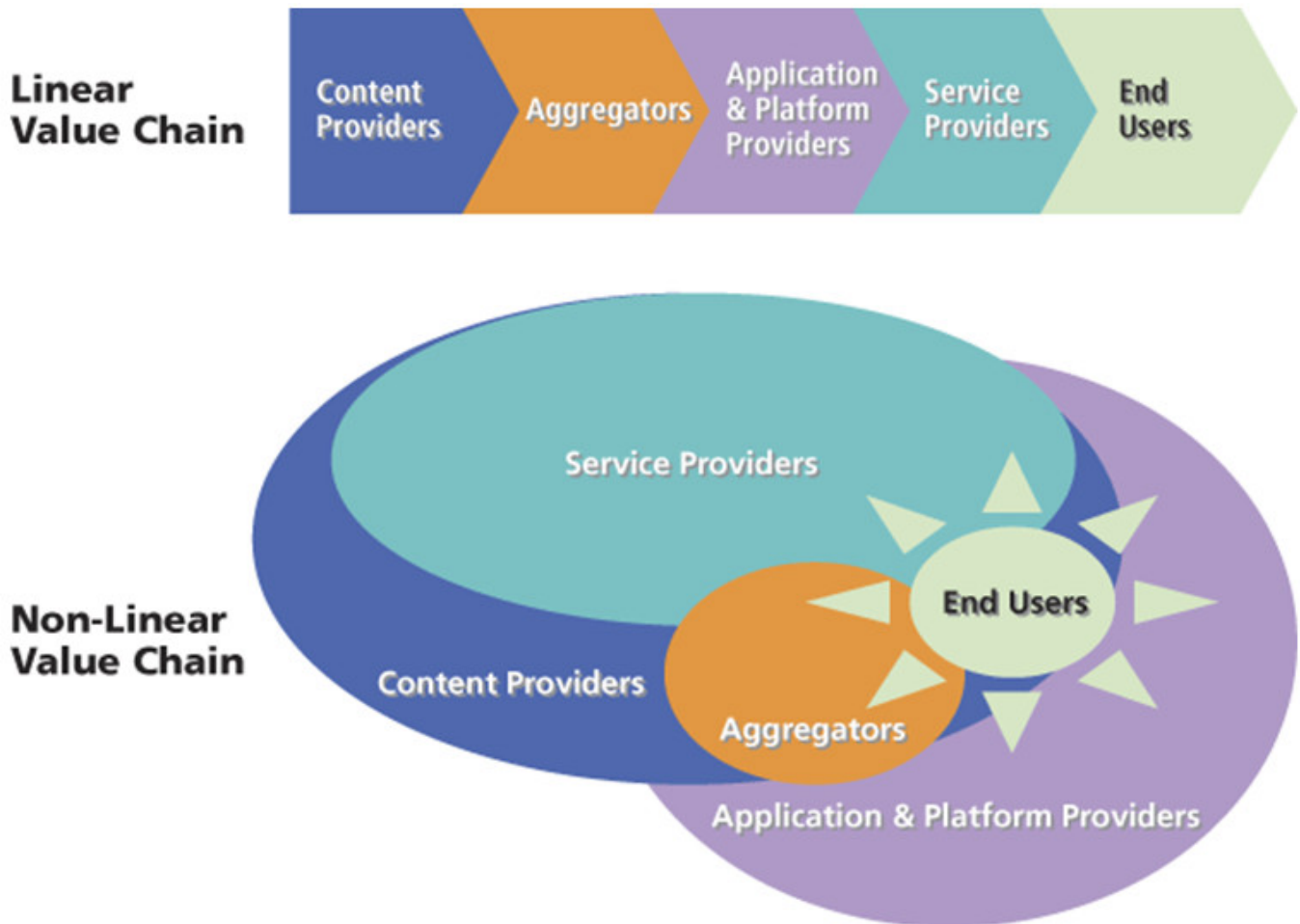
# Shared Responsibilities for Building Competencies

(Nancy McGovern)



# Content Delivery / Value Chain Model

(Sarah Chesemore)



**Source:** [http://connectedplanetonline.com/access/technology/content\\_delivery\\_chain\\_072606/](http://connectedplanetonline.com/access/technology/content_delivery_chain_072606/)

*This event was made possible in part by the Institute for Museum and Library Services. Further information on summit host organizations is provided below.*



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