

Margaret Friesen

The Staff Training and Development Program, 1991-2007, University of British Columbia Library

I. Start Up

Organization:

A staff training and development committee was formed in 1991. The committee prepared a report and plan for staff development and launched the program in 1992. In 1995, Margaret Friesen was appointed Coordinator (50%) of Staff Training and Development.

Erik de Bruijn and Margaret Friesen described this comprehensive plan and program in a chapter “Investing in Human Resources: Staff Training and Development at the University of British Columbia Library” in *Advances in Library Administration and Organization*, volume 14, 1996 (JAI Press). This description included the goals and objectives of the program, as well as the program phases (or levels of training and development):

- Orientation
- Skills training for the job
- Reinforcement/enhancement of learned skills
- Training for changing roles
- Career development (advanced/specialized)

In 2000, a Task Group on Travel Funding recommended that the Librarians Travel Fund program be folded into the Staff Training and Development Program for a trial period. This program was later extended to 2004.

In 2005, a revised Library Staff Professional Development and Training Program was approved, with Margaret Friesen and Deborah Austin as Co-chairs of an advisory committee. Margaret Friesen continued to manage the program as Coordinator of Staff Training & Development to 2007.

Three library-wide training needs surveys were conducted: 1991, 1993, 2000.

II. Program

Annual reports summarize the plans and programs for the years 1992/3 through 2007. The following annual reports are appended:

1996-7, 1997-8, 1999/00-2006/07

Most of these reports were also posted to the staff intranet at <https://staffinfo.library.ubc.ca/development/stdc/hist/>

a. Courses: Scope

The list of program courses (appended) and training suppliers illustrates the comprehensiveness of the program from 1992 to 2007:

- audience
 - all employee groups, librarians, management & professional, library support staff
- phases of training and development
 - from orientation through advanced/specialized
- breadth and depth of learning
 - including information resources and provision, management, technology, all subject and format specialties, employee relations, personal development, customer services, library services, health & safety, and many more
- collaboration with campus suppliers
 - Human Resources - MOST Program, Continuing Studies, TAG, SLAIS, etc.
- collaboration with professional associations
 - Association of Research Libraries, BCLA, etc.
- variety of venues
 - from local hands-on training and "distinguished speaker series" to one-of-a kind international conference venues

b. Highlights: Projects and Trainers

Library-wide training working groups were formed for three big projects:

- DRA Training Task Group, 1995-7
- ILS Training Working Group (Voyager), 2003-5
- UBCO Library Integration Project Training Working Group, 2005

This community of trainers contributed teaching and coaching expertise to library staff, a legacy visible not only internally, but also on campus. The process of developing this community of trainers was described in the article "Building the Bridge as You Walk on it: Developing UBC's Community of Trainers", published in *ARL* 194, Oct. 1997, p. 8-9.

c. Other Highlights

These are described in more detail in the annual reports:

1996-8	Preparing staff for two major changes: the move to Koerner Library and the implementation of the new automated library system DRA. Courses: <ul style="list-style-type: none">Facilitating Change (ARL Seminar)Managing Personal Change and TransitionConflict Resolution
1999/00	Electronic Resources (E.R.) Series Health and Safety series (9 topics) Drawing the Line (employee relations)
2000/2001	Referral Skills (Customer services) Library-Wide Open Houses (cross-unit knowledge and understanding)

	Health & Safety: Ergonomics
	Media Copyright (Epp, Mitter)
2001/2002	Library Overview Training Series (LOTS): The Plan Are we Losing Our Minds? (Kunin Colloquium)
2002/2003	Library Overview Training Series launched
2003/2004	Learning by Design: Voyager Training
2004/2005	Learning by Design 2: Voyager Training SLAIS/UBC Library Distinguished Speakers Series
2005/2006	SLAIS/UBC Library Distinguished Speakers Series (Michael Geist, Heather Joseph) Library Trends Workshops launched
2006/2007	Across the Desk, Across the World (intercultural communications) Performance Management (Library Human Resources)

Appendix: Annual Reports

Page

4	1996/97-97/8	Annual Report
6	1999/00	In Common Cause: Furthering Learning and Research
10	2000/01	Room to Grow
17	2001/02	To See the Trees and the Forest: a Structured Training Series for All
22	2002/03	The Learning Cycle: Staff Training/Development and User Instruction
25	2003/04	Learning by Design: Voyager Training
29	2004/05	Learning by Design 2: Beyond Go-live Day with Voyager
32	2005/06	Participation in Teaching and Learning (with Appendix B: Special Events)
37	2006/07	Participation in Teaching and Learning

40 Appendix: List of programs and courses 1991-2007

Author Margaret Friesen:

Chair of the Staff Training Committee, 1992 – 2005

Staff Training and Development Coordinator (50%), 1995-2007

Co-chair of Library Staff Professional Development and Training Program, 2005-07

Chair of the DRA Training Task Group, 1995-97

Chair of the ILS Training Working Group (Voyager), 2003-5

Subcommittee chair of the UBCO Library Integration Project Training Working Group, 2005

Member of the MOST Committee, 1994-98.

Summary prepared: January 2010

With assistance from Bailey Diers, SLAIS Co-op Student

Annual Report on Training and Development (1996/7 and 1997/8)

An active training and development program continues to support staff members as they manage and use new information technologies, accommodate changing work responsibilities, deal with financial restraint, cope with the need to reorganize and develop new services and teach information technologies to students, faculty and staff.

In its fifth year of programming, the Library's Staff Training and Development program supported 248 sessions or courses for 1,339 participants. These training activities were expanded in the program's sixth year, when a record-breaking 454 sessions for 3,201 participants were supported.

In the past two years, the program focussed especially on preparing staff for major changes in two areas:

- the move of Humanities/Social Sciences, some Circulation and Processing staff from the Main Library and Library Processing Centre to the new Koerner Library, and
- the implementation of the new automated library system, DRA.

This colossal systematic training program on the four DRA applications consisted of 209 formal sessions (18 modules) presented by over sixty librarians and library assistants and attended by 2649 participants, an average of 12 modules per staff member.

Three staff training and development initiatives were undertaken specifically to help staff deal with change and transition. Senior managers attended a two-day Association of Research Libraries (ARL) seminar on site on *Facilitating Change*. Staff members attended two practical sessions on *Managing Personal Change and Transition* and *Conflict Resolution*. Three computer skills courses were customized for staff and brought in-house through contracts with Continuing Studies. In the following year, two programs were brought in-house, tailored to the library's environment: *Employee Relations* for library managers, and *Customer Services* for public service staff.

Implementation of DRA was the catalyst for bringing the ARL Training Skills Institute to campus to develop the training and presentation skills of a group of fifty trainers. In addition, this latter program achieved a number of related benefits: it crossed boundaries of levels of staff and functions in the Library, it developed a sense of community among the trainers and it identified a pool of talent for programming and presentation of training events for the future. The time, effort and funds devoted to equipping the DRA trainers with new teaching techniques and skills in the previous year paid off. Skills learned in the TSI were applied to the design of other in-house programs such as customer services and ergonomics, as well as in the planning for the revised library instruction programs for students, faculty and staff.

Individualized training was provided to several hundred participants in each year in a variety of subjects, as diverse as the library's specialists themselves, such as, information technology, media literacy, advanced cataloguing, marketing, research tools, management/leadership/supervisory skills, specialized information databases, data libraries, electronic texts and teaching tools, ergonomics, medical librarianship, business information sources, performance measures, government information files, interlibrary loan, presentation

skills, archives and records management, publishing. The full range of computer skills courses offered by Continuing Studies Computer Skills program and the communications and organizational skills offered by the MOST program were supported.

In addition to the DRA training sessions, in-house trainers presented over one hundred seminars over two years in such diverse subjects as internet access, goal setting, performance reviews, the collective agreement, peer training, cataloguing, budget preparation and monitoring, new microforms technology, disability awareness, emergency preparedness and designing web pages.

Non-routine training methods included a distance education tutorial conducted by electronic mail, an audioconference piped into the Biomedical Communications Centre, learning from vendor demonstrations offered at the Z39.50 conference and at DRA training sessions and an open-house “show-and-tell” format to demonstrate new microforms/digital scanning technology. Additional tools were added to the trainers’ repertoire. The library purchased its own camcorder and related equipment to permit trainers to tape case studies for presentation and analysis. A web page for staff was designed to highlight the library’s staff training and development program and link it to MOST (Human Resources Management and Other Skills Training) and Continuing Studies course information.

In 1997, in addition to funding from the Staff Training and Development budget (\$60,000), the Librarians’ Travel Grants Committee allocated \$9,320 to 13 individuals to partially fund attendance at conferences and meetings of scholarly or professional societies, while \$50,385 from the administrative travel budget permitted another 37 individuals to attend 46 meetings or conference sessions as representatives of the Library.

Margaret Friesen, Staff Training & Development Coordinator, 1998

In Common Cause: *Furthering Learning and Research*
Eighth Annual Report on the Staff Training and Development Program
For the Year Ending March 2000

“The UBC Library recognizes that its staff - librarians, management and professional staff, support staff, and student staff - are its most important resource in supporting the research and learning needs of the UBC community. The Library is committed to attracting and retaining excellent staff at all levels, and to providing them with the training and development they need to fulfil their responsibilities.” (*Furthering Learning and Research: a Strategic Plan for the UBC Library*. Draft, April 2000).

In its eighth year of programming, the Library’s Staff Training and Development (ST&D) Program supported 247 sessions or courses for 2,366 participants, an average of thirteen hours of instruction per staff member (FTE).

Forty trainers presented ninety percent of the formal training in 163 in-house sessions. Eighty-three percent of the activities covered four main topics:

- Customer services
- Information resources and services
- Health and safety
- Information technology

Customer services

Members of the Staff Training and Development Committee identified this topic as a priority training need for several services. The training designs for two modules, *Referral Skills* and *Telephone Courtesy*, were undertaken in-house and presented in 5 sessions to 55 participants. Repeat sessions are planned, as well as a third module directed at circulation staff.

Information resources and services

Staff members need training similar to what the Library offers its students and faculty with the *Information Connections* curriculum. Some of the same modules were spun off into the Electronic Resources (E.R.) series and designed specifically for library staff. In addition, 13 trainers from 5 different information/reference services conducted 23 sessions for recently hired graduate academic assistants (GAA’s), an average of 9 hours of training per GAA. Topics included orientation to the reference collection, access to library resources (web-based and print), electronic texts, government publications and others. Finally, life sciences library staff members were treated to training on statistical information resources, designed specifically for them by the data librarian.

Health and safety

Nine topics on health and safety were presented in 25 sessions to 709 participants. The range of topics included: disaster and emergency preparedness, fire safety, general health and safety, personal security, and ergonomics. The sessions for 170 student staff members included a segment on the appropriate use of technology. Repeat sessions are planned for each quarter as new staff members are hired.

Information technology

New system-wide computer program installations require system-wide relearning or updating. Systems staff tackled the training need by scheduling 65 sessions on the new NT software for 362 participants. Simultaneously, a dozen Systems Authorized Library Support Staff (SALS) were identified and trained to solve computer hardware/software problems at the unit level.

Access and accountability

Cross-unit DRA-related training continued at the introductory and intermediate levels for distributed services in cataloguing, circulation and interlibrary loan/document delivery/media services. Two topics on financial accountability, one on accessing cost information for serials subscriptions and one on “taming the budget”, were also repeated.

Internal/external partnerships

Learning opportunities turn up in many forms. Four vendors demonstrated their products and services to 76 participants. The Asian Library brought its workshop on CJK products and technologies to the newly refurbished Dodson Room and attracted a full house, including 40 library participants, as well as faculty and student researchers. Thirty participants attended the Library Lecture, presented by Dr. Colin Steele, University Librarian, Australian National University. The Vancouver Online Users Group program on WebCT attracted a sell-out crowd from the region, including 20 UBC library participants.

The program on employee relations, *Drawing the Line*, was brought in-house and presented by the University’s Human Resources advisors and CUPE 2950 president to supervisory library assistants. The University’s Organizational and Training Development office provided free courses on such topics as *Breaking Down Racism*, *Disability Awareness*, and *Selection Interviewing*. This year 52 library participants attended six of these sessions.

The Library’s orientation program, introduced last year and developed fully this year, includes both internal and external sponsors. The first phase, the University-wide orientation program, introduces UBC to all new faculty, librarians and support staff. The second phase introduces the Library to its new staff. Twelve new recruits have completed the entire orientation program.

Campus resources

Seven percent of this year’s learning activities took place on campus. The three main sources for training are Human Resources’ Organizational Training and Development (MOST program), Continuing Studies Computers & Technology Programs, and the UBC Centre for Teaching and Academic Growth (TAG). Computer skills programs attracted 28 participants to 16 sessions. The MOST program, in addition to the free courses mentioned above, attracted 45 participants to 22 different topics. TAG courses were both taken and given: UBC librarians taught 8 courses and 12 librarians attended 3 courses. The Library Information Skills Training (LIST) program is a regular offering of the MOST program and is taught by the Information Services librarian.

Off-campus training resources

Some learning needs are matched with training resources from off-campus. This year 71 participants attended 34 different sessions off-site. The range of courses and venues varies from year to year, depending on which events come to town. This year’s attractions were the Serials

Cataloging Cooperative Training Program, the Art Libraries conference and the Medical Library Association/Canadian Health Libraries Association conference and workshops.

Finally, one-of-a-kind learning activities for library staff mirror the “distinctive learning, outstanding teaching and leading-edge research”¹ specialities on campus. For example, library specialists received support for training in such topics as archives, data librarianship, distance education library services, electronic texts, instructional design, intercultural communications, interlibrary loan and media services, statistical information resources, systems development and web design.

The common cause

The Library’s Staff Training and Development Plan provides the framework for matching learning needs with training activities. Although the Plan was developed some years ago, its guiding principles and goals are still congruent with the Library’s current strategic plan. Trainers learn and they, in turn, pass on their knowledge to others in the common cause of furthering learning and research at UBC.

Appendix 1. Staff Training and Development Program Participation 1999/2000

Margaret Friesen
Staff Training and Development Coordinator
May 2000

¹ *Furthering Learning and Research: a Strategic Plan for the UBC Library* (April 2000 draft), 4.

Appendix 1.
Staff Training and Development Program Participation
1999/2000

Courses	Session Numbers	Teaching Hours	Participants Numbers	Participants Hours
A. Cross-unit In-house				
Cataloguing	2	4	9	18
Circulation	2	3	29	44
Customer Services Training Series	5	7	55	71
Financial Information Training Series	7	7	51	51
Health & Safety Orientation	25	54	709	1070
Human Resources-Employee Relations	2	3	38	54
Information/Reference	43	64	657	925
Interlibrary Loan/ DocDel/Media Services	1	2	20	30
Systems	68	70	398	413
Vendor presentations	5	7	78	105
Other	3	7	90	200
Subtotal A: In-house	163	228	2128	2981
B. Campus Venues				
Continuing Studies Computer Skills	18		28	338
Organizational Training + Development	31		127	638
TAG	3		12	72
Subtotal B: Campus	50		167	1046
C. Off-site Venues	34		71	666
Total participation	247		2366	4693

Room to Grow: People and their Training Programs
Ninth Annual Report on the Staff Training and Development Program
For the Year Ending March 2001

“The UBC Library recognizes that its staff - librarians, management and professional staff, support staff, and student staff - are its most important resource in supporting the research and learning needs of the UBC community. The Library is committed to attracting and retaining excellent staff at all levels, and to providing them with the training and development they need to fulfil their responsibilities.” (*Furthering Learning and Research: Implementing the UBC Library’s Strategic Plan 2000-2003, March 2001*)

In support of the research and learning needs of the UBC community, the library provides all-season staff training and development programs to match the disparate learning needs of its staff. Training designs are created for specialist and non-specialist alike in technical and non-technical subjects. Programs are offered in-house, on campus or off-campus.

This year the Staff Training and Development Committee took stock of its program selections by conducting a survey. Staff were asked to indicate their participation rates, reasons for participation or non-participation, and priorities for training. The results of the survey indicated that many existing programs are valued, considered to be relevant, and perceived to contribute to career development. The survey responses also revealed a few gaps in training programs at the overview level. These are identified in the relevant sections below and will be addressed in future programming.

In the ninth year of programming, the Library’s Staff Training and Development (ST&D) Program supported 394 sessions or courses for 2261 participants.

In-house programs

More than forty trainers presented 88% percent of the formal training in-house in 267 sessions, an average of 11 hours of in-house training per staff member (FTE). Ninety-two percent of the in-house activities covered seven main topics, directly related to the library’s mission and values:

- Customer services
- Information resources and services
- Teaching/instruction
- Preservation of the collection
- Employee relations
- Orientation to the library
- Health and safety

Some programs are tried and true. Perennials include the Information Services Electronic Resources Series, the Customer Services Series, the Cataloguing Skills training programs and the five modules of the Health and Safety Orientation program.

Customer services

Repeat sessions of *Borrower Services*, *CircPlus* (including interlibrary loan/media services), *Referral Skills* and *Telephone Communication Skills* were presented in 13 sessions to 97 participants. Student trainers from the Disability Resource Centre presented two sessions on *Disability Awareness* to 40 participants. An identified gap in training for customer services is the

lack of an overview course on communication skills, to ensure a uniformly high standard of behavioural skills in dealing with customers and co-workers.

Information resources and services

The popular Electronic Resources (E.R.) Series sold out all of its 16 sessions with 506 participants attending. This series covered topics on e-journals, e-reserves, navigating the web and online reference resources. In addition, 13 trainers from 5 library units presented 30 hours of training sessions for recently hired graduate academic assistants (GAA's). Topics included orientation to the reference collection, access to library resources (web-based and print), electronic texts, government publications and others.

These excellent courses are targeted primarily at frontline information services staff. An identified gap in training is the lack of an overview course on the Library and UBC web sites for staff who are not on the frontline. The course would include training on access protocols, structures, definitions and web links. It would enable all staff to work from a common understanding of how the library's information resources appear to the customer and to see how their particular work fits into the total library and university landscape.

Without preparatory functions in acquisitions, cataloguing and serials control, information services would have little to show. Ongoing training in these technical services is necessary as new staff members are hired, functions are decentralized or systems are changed. This year, catalogue librarians and paraprofessionals concentrated the training on the Asian language cataloguing group who had recently moved into a new location and were setting down their own roots in a new environment.

Non-specialists in both public and technical services would also gain confidence in their referral skills by viewing the technical processing panorama. An identified gap in training is the lack of an overview session on technical services for these generalists, with stepping stones to guide them through the sequential maze of library processing functions.

Support for information technology skills training is a continuous need. Some of this training takes place in formal classes. However, much of the ongoing coaching and problem solving occurs informally at the unit level, in consultation with Systems Authorized Library Support Staff (SALS), information services and library systems specialists.

Two training gaps were identified. One is the lack of an overview session on the library's online systems that would explain how all the pieces ---functions, views, vocabulary, modules --- fit together. The other is a brief overview session on computer literacy from the ground up, to be scheduled as soon as possible after a new staff member is hired. This session would not duplicate what most new recruits know already about hardware and software, but rather feature any new elements that are unique to the library's particular computer environment.

Teaching/instruction

Twenty-one UBC librarians took advantage of ten different high-quality instructional skills workshops offered by the Centre for Teaching and Academic Growth (TAG). Reciprocally, librarians also taught courses for TAG, The Library Information Skills Training (LIST) program,

offered through the Organizational Training and Development (OTD) programs, and the bi-monthly University-wide Orientation sessions. The teaching tips they learned in the field were shared with others in a Teaching Liaison Group “Institute”.

Preservation of the collection

Three sessions on preservation were presented to 53 participants. An overview session, *Care of the Collections*, covered general procedures and was open to all library staff. The next level of training, a session on *Book Repairs*, was customized for the fifteen branch or unit staff members who are most directly responsible for the care of the collection in their respective libraries. These caretakers learned some specific techniques for repairing worn and torn books, as well as some appropriate strategies to use when assessing the need for and level of repairs, in consultation with the Mending Assistant and Assistant University Librarian for Collections.

Employee relations

University-wide sessions were held to brief managers and employees on the new CUPE 2950 contract, pay equity updates and job re-evaluation systems. Two programs were brought in-house. Human Resources advisors and the CUPE 2950 president reviewed the changes in the contract with 55 managers and supervisors and briefed 55 staff members on pay equity developments. In fall, 135 CUPE members and their managers attended campus wide training sessions on the re-evaluation phase of the job evaluation process. The always-popular *Selection Interviewing* workshop, offered by Human Resources, attracted 12 library managers and supervisors.

Orientation to the library

The first phase, the University-wide orientation program, introduces UBC to all new faculty, librarians and support staff. The second phase introduces the Library to its new staff. This year three new learning segments were added: a *Virtual Tour of the Library*, guided by the Information Services librarian; a *Welcome to the Library* meeting with the University Librarian; and library-wide *Open Houses* for novice and seasoned alike. All three events present opportunities to broaden views and contacts. In the pilot year, 43 new staff members took the virtual tour, 15 met the University Librarian close up, and 121 staff members clicked on the Open House online registration form for the venue of their choice. These 45-minute tours and talks will now become perennial, with gates opened twice a year in 24 library units/divisions.

Health and safety

The library’s *Health and Safety Orientation Series* is also a repeating series, presented three times a year as new staff members are hired. These sessions are mandatory for all staff and cover topics on health and safety policies and procedures, disaster and emergency preparedness, fire safety, personal security, and ergonomics. For student employees, a segment on the appropriate use of technology is included. In total, eleven sessions were held for 196 participants.

The health and safety topic of the year was “ergonomics”. Two special guests emerged as trainers and mentors. In April 2000, Dr. Lance Rucker was the guest speaker at the First Library Staff Training and Development Colloquium. In a most engaging and entertaining lecture, Rucker described and illustrated the risks of repetitive stress injury in the practice of dentistry and measures taken to reduce injury and risk. He also demonstrated the *ergoLogic™ Keyboard*,

an invention he pioneered as a result of his research and practice into ergonomics. The second guest trainer, Gina Agelidis (Ergonomics Program Officer, University Health, Safety and Environment), not only co-presented an in-house session on ergonomics but also followed up with expert individual and group consultations.

Collaborators, partners and networks

Teaching and learning opportunities crop up all over and in many forms. Two e-Library symposia in April and November drew faculty and staff, including 71 library staff, from all over campus to standing-room-only sessions. Four vendors of new and improved electronic collections demonstrated their products. The world of Asian library cataloguing was explained in an informative session on the conversion from the Wade-Giles to the Pinyin romanization system (Chinese characters into romanized letters).

The competing interests of creators and users were bared in a session titled *Media Copyright and Distributed Learning: Is Technology Beating the Law?* Mary Anne Epp and Niina Mitter, media library specialists from Langara College Library, described the current dilemma: the ease with which instructional materials can be adapted from one format to another, and the concomitant requirement to exercise due diligence in observing copyright laws while doing so. Finally, two staff members chose self-paced distance learning programs, designed by the Association of Research Libraries Office of Leadership & Management Services (ARL/OLMS) Online Lyceum.

Campus training resources

Nine percent of this year's learning activities took place outside the library but still on campus. The three main sources for training are:

- Centre for Teaching and Academic Growth (TAG).
- Continuing Studies Computers & Technology Programs
- Human Resources' Organizational Training and Development (MOST and other programs)

TAG's outstanding 3-day Instructional Skills Workshop attracted several librarians. The Continuing Studies computer skills programs attracted 50 participants to 18 sessions, primarily in spreadsheet applications, word processing and internet publishing. The MOST program attracted 127 participants to 49 different topics on communication, interpersonal and management/supervisory skills development.

Off-campus training resources

Three percent of the library's learning needs were matched with training resources from off-campus. This year 68 participants attended 50 different sessions off-site. The range of courses and venues varies from year to year, depending on which events come to town. This year's attractions were the Association for Media and Technology in Education in Canada conference, several B.C. Library Association Continuing Education workshops, the OCLC Cataloguing workshop, the Fast Forward Media Showcase and the Langara College Library Technician Program courses.

Finally, one-of-a-kind learning activities for library staff mirror the diverse research and teaching interests on campus. Library specialists dug into such topics as: archives management, Asian library resources and services, data librarianship, distance education library services, electronic

licensing, electronic reference service, electronic texts, fine arts librarianship, instructional design, intercultural communications, law librarianship, management practices, medical library resources, music librarianship, presentation skills, report writing, science and technology librarianship, statistical information resources, systems development and training/teaching methods.

Summary:

The library clearly supports relevant learning opportunities for its staff. Most of the training programs are delivered in-house by committed library trainers. Top-notch campus and off-campus resources supplement these in-house resources. However, learning is never static and training programs need to evolve as learning needs are identified. The proposed overview series of programs will provide additional opportunities for staff to grow.

Acknowledgements:

Thank you to the more than forty in-house trainers, scores of external trainers, collaborators, and partners who enrich our programs. We appreciate the financial support from the Library Staff Training and Development fund, the Job Skills Training Program, the Librarians Travel fund, and the Teaching and Learning fund (Disability Awareness sessions). Thank you to the dedicated members of the Staff Training & Development Committee for your advice and support.

Margaret Friesen, Staff Training and Development Coordinator
May 2001

Appendix 1. Staff Training and Development Program Participation 2000/2001

Staff Training and Development Committee:

Sheryl Adam	Julie Clarke	Richard Hare	Sally Taylor
Desiree Baron	Leonora Crema	Lotte Illichmann	Rick Welch
Doug Brigham	Donna Curtis	Peggy-Lynn MacIsaac	Suzan Zagar
Helen Chow	Margaret Friesen (chair)	Dwight Tanner	

2001-01 page 1		Session	Sessions	Teaching	Participa	Participa	Part.nos.
Course		Duration-	Numbers	Hours	Numbers	Hours	Subtotal
A. Cross-unit In-house							
Catalogui	Cross-unit:non-LPC	2	56	112	56	112	
	DRA Bibliographic Training	2.0	9	18	21	42	
	DRA/Comput	7.0	1	7	4	28	
	<i>Subtotal</i>		66	137	81	182	81
Circulatio	Borrower Services	2.5	9	23	40	100	
	CircPlus	6.0	1	6	26	156	
	<i>Subtotal</i>		10	29	66	256	66
Customer Services Training Series:							
	Referral Skills	2.5	1	3	22	55	
	Telephone courtesy	1.0	2	2	9	9	
	<i>Subtotal</i>		3	5	31	64	31
Disability Awareness		2.0	2	4	40	80	40
Financial Information Training Series:							
	Tame the Budget	1.0	6	6	33	33	33
Health & Safety Orientation:							
	Basic earthquake prep	1.0	1	1	9	9	
	Emergency Preparedness	1.0	2	2	25	25	
	Ergonomics	1.0	3	3	51	51	
	Ergonomics-Rucker	3.0	1	3	35	105	
	H&S - general	1.0	2	2	25	25	
	HS for student staff	1.0	2	2	51	51	
	<i>Subtotal</i>		11	13	196	266	196
Human Resources-Employee Relations:							
	CUPE2950 contract	1.5	2	3	55	83	
	Job evaluation instruction	1.0	7	7	135	135	
	Pay equity briefings	1.5	2	3	55	83	
	<i>Subtotal</i>		11	13	245	301	245
Information/Reference:							
Electronic Resources Series:							
	E-journals	1.5	1	2	40	60	
	Elzevier e-journals	1.5	1	2	20	30	
	Ereserves	1.5	2	3	20	30	
	MyUBC	1.5	1	2	48	72	
	Puzzling printing	1.5	1	2	31	47	
	Taming Web	1.5	3	5	93	140	
	Tis the season Proxy	1.5	1	2	31	47	
	UBC Lib Web	1.5	1	2	48	72	
	WebCT	1.5	1	2	42	63	
	WebCT May 19th	1.5	1	2	30	45	
	WebNG	1.5	1	2	35	53	
	WebSpire	1.5	1	2	38	57	
GAA 24 Topics		1.5	20	30	226	339	
Life Sciences Libraries-cross unit		1.5	6	9	42	63	

2000/01 page 2		Sess Hr	Sess #	Teaching Hr	Partic #	Partic Hr	Part subtot
Vendor presentations		2.0	4	8	101	202	
	<i>Subtotal</i>		45	75	845	1320	845
Orientation	Library-UL	1.0	2	2	15	15	
	Open Houses	0.8	45	34	121	91	
	Virtual tour	1.0	43	43	43	43	
	<i>Subtotal</i>		90	79	179	149	179
Preservation		1.5	3	5	53	80	53
Teaching/instruc	e-Library	6.0	2	12	71	426	
	Media copyright	3.0	1	3	16	48	
	TLG Institute	3.0	1	3	15	45	
	<i>Subtotal</i>		4	18	102	519	102
Technical Service	Periodicals/Binding Forum	2.0	2	4	40	80	40
Other:	Systems	1.0	7	7	10	10	
	Asian info resources	1.5	4	6	33	50	
	Sustainability forum	1.0	1	1	8	8	
	Transportation @UBC	1.0	2	2	33	33	
	<i>Subtotal</i>		14	16	84	101	84
Total A: In-house			267	404	1995	3431	1995
B. Campus Venues							
Continuing Studies: incl. MOST CS)							
	Computer Skills		10		16		
	Computer skills - JSTP		8		34		
	<i>Subtotal: Computer</i>		18		50		50
Organizational Training + Development: (excludes Computer skills through CS)							
	BEST		1		1		
	MOST - other		15		28		
	MOST - other - JSTP		17		50		
	MOST - free		8		18		
	Orientation: University		6		18		
	Selection interviewing		2		12		
	<i>Subtotal</i>		49		127		127
TAG:			10		21		21
Total B: Campus			77		198		198
C. Off-site Venues							
	Computer - off site		7		11		
	Individual specialized		34		46		
	Individual - JSTP		9		11		
Total C: Off-site			50		68		68
Total B+C: Campus and Off-site			127		266		266
Total A-C: Participation			394		2261		2261

**To See the Trees *and* the Forest: a Structured Training Series for All
Tenth Annual Report on the
Staff Training and Development Program
For the Year Ending March 2002**

A primary activity of this year's Staff Training and Development Committee was to plan the curriculum for the "library overview series", a structured training program on the library's functions and services at the introductory level.

Generally, staff members are recruited for a specific function or service and will learn these functions/services in-depth within the unit or department. Until now, no structured training program was available in-house for them to explore other library services, at least not early in their employment.

This new training series provides an overview of the UBC library's functions and services, information which may not otherwise be gleaned from the specialized training/learning programs that are offered within the unit or in advanced level cross-unit training programs. This general knowledge will contribute to a common understanding of the library's mission and goals, foster cross-unit fertilization, communication, and career development and permit everyone *to see the trees **and** the forest*.

A. The Library Overview Series (*the forest*)

The plan for the overview series identified eight core topics that every one in the organization should know something about. Two topics are already included in existing orientation programs. The remaining six topics required new training designs and will be presented in four new workshops to be piloted in 2002.

The core topics are:

1. Computer literacy orientation
2. Library health and safety orientation
3. Communications with customers and colleagues
4. Library web site
5. University of B.C. web site
6. Technical services
7. Online library system
8. Circulation (with finale: Strategic Plan)

1. Computer literacy orientation

Individual learning needs will be assessed as soon as possible after a new staff member is hired and arrangements made to match these needs with training resources. The training plan and program will not duplicate what new staff members know already about hardware and software, but rather will be tailored to fit the individual and/or will introduce any new information or skills that are unique to the library's particular computer environment.

2. Library health and safety orientation

Subtopics include health and safety orientation, ergonomics, emergency preparedness, personal security, fire extinguisher procedures, safety committee orientation. Some courses are offered in-house two or three times a year; some programs are sponsored by the University Health, Safety and Environment Office. Good ergonomic practices are reinforced through individual coaching sessions.

3. Communications with customers and colleagues

This course is scheduled as the first of four new courses in the overview series. Our people, customers and staff, are our most important resource. Effective communication skills with people are central to the library's mission and services. This course provides a foundation for all communications with customers and colleagues, whether face-to-face, by telephone or by e-mail, whether external or internal.

4. Library/University of BC web sites

The second new course will introduce staff members, front line or not, to the library and university environments "on the internet". The course will identify key library and campus departments and services, their corresponding web sites and navigation peculiarities. One of the learning objectives is to place the staff member's specialized function/service into the context of the broader library and university enterprise.

5. Technical services/online library system overview

The third new course will enable non-specialists in both public and technical services to learn something about the technical processing steps from beginning to end, e.g., to follow the book from its selection to its place on the shelf (or electronic shelf). Simultaneously, staff will learn how these processing steps are recorded and tracked online in the various modules, acquisitions, cataloguing, serials, circulation. The course also clarifies technical vocabulary that may not generally be known.

6. Circulation overview

This fourth new course will introduce non-specialists to some key services for users: borrowing materials, interlibrary loan services, reserve procedures. It also includes a demonstration of behind-the-scenes functions of borrower services, e.g., establishing the category of a user, tracking the status of a book, recording user information, etc.

7. Finale

To wrap up the overview series, a 20-minute segment on the library's organizational structure and its strategic plan will be appended to the circulation course.

Training designs for these programs are in progress and pilot courses will be scheduled in fall 2002. Upon completion of these four courses, expert and novice alike will have:

- reviewed the principles of the library's mission and values
- reviewed guidelines for communicating effectively with customers and colleagues
- gained a common understanding at an overview level of the library's services, functions, vocabulary, online applications, university context.

B. Staff training and development highlights of 2001/02 (*the trees*)

1. In-house programs

Eighty seven percent of the formal training in-house took place in 206 sessions, an average of 11 hours of in-house training per staff member. Nearly 60% of the in-house training covered the following key library services in depth: circulation, information/reference, instruction, interlibrary loan/document delivery. 132 participants, including student assistants, attended health and safety orientation sessions. 100 staff members participated in the library-wide open houses (44 sites), scheduled 4 times a year. 90 staff members attended a 2-day course on project management to assist them in undertaking the work of the task groups designated in the strategic plan, *Furthering Learning and Research: Implementing the UBC Library's Strategic Plan 2000-2003*.

Five special events attracted large and diverse audiences:

- *Are we losing our minds? how to get and keep the skilled people we need* (guest speaker Dr. Roslyn Kunin)
- The 3rd eLibrary Symposium
- Opening of the *Chung Collection* (guest speaker Dr. Wally Chung)
- Opening of the Learning Commons
- *Ways of seeing: UBC filmmakers showcase recent productions* (Raymond Hall, presenter, UBC Authors Week special event)

Some other noteworthy programs included:

- several advanced courses on Stats Canada and government information resources
- a new program on Windows NT Explorer file management, designed by Rick Welch and Suzan Zagar
- orientation training week for graduate academic assistants (20 topics)

The number and variety of vendor presentations scheduled in the last year demonstrates the extent to which the library's resource are electronic and accessible online. Demonstrations by vendors included the electronic resources of Lexis-Nexis, Cambridge Scientific, netLibrary/Coutts, Virtual Reference Manager, ChemAbs Sci Fi Scholar, IEEE, OCLC, and more.

2. Campus training resources

As in past years, 9% of the year's learning activities took place outside the library but still on campus. The three main training venues (with participant numbers) were:

- Centre for Teaching and Academic Growth (10 programs, 31 participants)
- Continuing Studies Computers & Technology (CSCT) programs (19 courses, 55 participants)
- Organizational Training and Development (OTD) (25 courses, 55 participants)

Other campus courses were sponsored by the University Health, Safety and Environment, the Equity Office, Continuing Studies non-credit and UBC credit programs.

3. Off-campus training resources

Four percent of the library's training activities (70 participants) took place off campus, reflecting the diverse research, teaching and service specialties of the staff. Staff members attended courses/sessions on intercultural studies, interlibrary loan, archival studies, serials processing, map and media resources, accounting, information technologies, library instruction, presentation skills and on a wide range of subjects, including data information, education, fine arts, and health information.

4. The library's instructors

Library staff presented twelve sessions for the Centre for Teaching and Academic Growth and participated as speakers in the third e-Library Symposium. At least 40 staff members presented 120 programs to other library staff and a notable 1325 sessions to students and faculty in every discipline on campus.

Summary:

The library provides year-round staff training and development programs to enable its staff to support the research and learning needs of the UBC community. The curriculum evolves as learning needs are identified. This year we focussed on the non-specialist staff member, the big picture and cross-unit understanding. We planned the library overview training series so that every one can know something about *the forest, as well as the trees*.

Appendix 1. Staff Training and Development Program Participation 2001/02

Margaret Friesen, Staff Training and Development Coordinator
May 2002

Acknowledgements:

The Job Skills Training Program (for CUPE 2950 staff) supported 94 participants, who not only attended on-campus programs sponsored by CSCT and OTD, but also off-campus courses delivered by BC Institute of Technology, Langara College, Vancouver Community College, Vancouver School Board - Adult Education, and the Women's Resource Centre at Robson Square.

Thank you to the more than forty library trainers, scores of external trainers, collaborators and partners who enrich our programs. We acknowledge the financial support for the Kunin Colloquium from the UBC Librarians and Archivists Association, the Library Administration, the School of Library, Archival and Information Studies, and the Langara Library Technician Program. Finally, thank you to the dedicated members of the Staff Training and Development Committee for their advice and support.

Staff Training and Development Committee:

Doug Brigham, Donna Curtis (to Feb. 2002), Margaret Friesen (chair), Heather Hettiarachchi, Lotte Illichmann, Peggy-Lynn MacIsaac, Jo-Anne Naslund, Simon Neame, Jane Shinn, Dwight Tanner, Elaine Thorson, Rick Welch, Suzan Zagar

Appendix 1: Participation 2001/02

Courses	Sessions Numbers	Teaching Hours	Participants Numbers	Participants Hours
A. Cross-unit In-House				
Cataloguing	83	166	241	482
Circulation	4	8	58	116
Customer Services Training Series	5	7	37	56
Health & Safety Orientation	9	10	132	143
Information/Reference Information	41	54	503	663
Technology	2	2	35	35
Instruction	1	1	18	18
Interlibrary Loan/DD	1	2	43	86
Open Houses: branch	44	44	100	100
Project Management	3	36	90	1080
Special events*	9	15	318	558
Technical services	2	4	28	56
Other	2	2	33	33
Subtotal A: In-house	206	351	1636	3426
*includes open houses Chung, Learning Commons eLibrary Symposium, Kunin Colloquium, etc.				
B. Campus Venues				
Continuing Studies	19		55	
Org. Training & Development	25		55	
TAG	10		31	
Other campus	14		32	
Subtotal B: Campus	68		173	
C. Off-site Venues	49		70	
Total Participation	323		1879	
Summary:				
Percentage of participants: in-house (1636/1879)			87%	
Percentage of participants: campus/off-site (243/1879)			13%	
Hours of instruction in-house per fte			11	
Group teaching hours in-house			351	
Number of trainers: in-house			40+	
Courses taught on campus: sessions				
TAG	12			
Univ.wide orientation	4			
To students/faculty campus-wide	1325		25,246	

The Learning Cycle: Staff Training/Development and User Instruction in 2002/3

Highlights of the library's training and development program

A. In-house (119 sessions, 1,039 participants)

1. The Library Overview Training Series

- First series was held in November 2002 (24 attendees)
- The 4 modules of the training series are:
 - Communications with customers and colleagues
 - Library/University of BC web sites
 - Technical services/online library system overview
 - Circulation overview, with Finale: Strategic plan: mission and values
- The next series is scheduled for May 2003
- See annual report for 2002 for a description of the series/modules.
<http://www.library.ubc.ca/staff/stdc/report02.html>

2. Finding articles 101

- 23 staff members attended this session, adapted from the Information Connections course

3. Graduate academic assistant training

- A 5-day program, August 26-30, 2002, on 35 topics was scheduled for eight GAA's in Humanities & Social Sciences. Some sessions, e.g., communications skills, services to persons with disabilities were open to all GAA's.

4. Cataloguing

- A regularly-scheduled program, presented by Rick Welch and others, provides practical hands-on training on record creation for ordering and for course records (29 participants)

5. Supervisory Skills (Carollyne Conlinn)

- Two 2-day workshops were scheduled in April and June 2002 (30 participants). Two follow-up drop-in sessions were also held in September and October 2002.

6. Orientation open houses – library wide

- 45 minute sessions were scheduled in June and December 2002 (33 sites, 86 participants)

7. Special event: UBC Authors Week

- 40 participants attended William New's informative and entertaining speech "Walking with a bicycle: the Encyclopedia of Literature in Canada Project".

8. MyUBC

- Two sessions presented by Information Services attracted 60 participants

9. Health & safety orientation

- 87 participants attended

10. Vendors

- 7 vendor demonstrations, including Ebsco, Swets Blackwell, attracted 122 participants.

B. Campus partners

97 participants attended 62 sessions on campus, primarily at Continuing Studies, Organizational Training and Development and the Centre for Teaching and Academic Growth.

C. Off-campus venues

85 participants attended training and development venues off-site, some local (Vancouver Community College Oakridge, Langara College, Vancouver School Board). Off-site courses and conferences included topics on archives, law librarianship, health libraries, serials cataloguing, interlibrary loan, information technology, assertiveness skills training and dealing with difficult people.

D. Funding

The Job Skills Training Program (for CUPE 2950 staff) supported 67 individuals for both on campus and off-campus courses. Staff training and development funds and librarians' travel funds supported 133 individuals.

Summary:

When library staff learn from others, whether in-house or off-site, they incorporate this knowledge into what they teach others, staff, students, faculty. In 2002/3, 1,221 staff participants and 28,230 student participants engaged in this learning cycle.

Thank you to the dedicated members of the Staff Training and Development Committee for their advice, support and training designs. Thank you to all trainers, with special thanks to the Library Overview Training Series presenters: Doug Brigham, Alethea Greenwood, Peggy-Lynn MacIsaac, Jo-Anne Naslund, Simon Neame, Catherine Quinlan, Jane Shinn, Rick Welch.

Margaret Friesen, Staff Training and Development Program, May 2003

Staff Training and Development Committee:

Doug Brigham	Simon Neame
Margaret Friesen (chair)	Jane Shinn
Heather Hettiarachchi	Dwight Tanner
Lotte Illichmann	Elaine Thorson
Peggy-Lynn MacIsaac	Rick Welch
Jo-Anne Naslund	Suzan Zagar

Appendix: Participation 2002/3

Staff Training and Development Program Participation 2002/3

Courses	Sessions	Teaching	Participants	Participants
	Numbers	Hours	Numbers	Hours
A. Cross-unit In-House				
Cataloguing	18	24	44	66
Collections	7	10	122	183
Customer Services	2	2	55	55
GAA	40	40	324	324
Health & Safety Orientation	3	3	87	87
Information/Reference	3	5	55	83
Information Technology	2	3	60	90
Instruction	2	3	13	19
Interlibrary Loan	1	1	2	2
Library Overview Training Series	4	5	90	90
Open Houses: branch	33	33	86	86
Special events*	1	1	40	40
Supervisory skills	5	20	61	244
Subtotal A: In-house	119	150	1,039	1,369
*UBC Authors: Walking with a bicycle (W.H.New)				
B. Campus Venues				
Continuing Studies	20		28	
Org. Training & Development	28		53	
TAG	12		12	
Other campus	2		4	
Subtotal B: Campus	62		97	
C. Off-site Venues	85		85	
Total Participation	266		1,221	
Summary:				
Percentage of participants: in-house (1039/1221)			85%	
Percentage of participants: campus/off-site (182/1221)			15%	
Hours of instruction in-house per fte			4	
Group teaching hours in-house			150	
Number of trainers: in-house			40+	
Courses taught on campus: sessions				
TAG	2			
Univ.wide orientation	4			
Research awareness week	10			
To students/faculty campus-wide	1,471	sessions	28,230	participants

Margaret Friesen
Staff Training and Development Coordinator

6/11/03

Learning by design: Voyager training at UBC Library

Staff Training and Development Program Annual Report 2003-04

Design and structure --- planned, focused, accelerated --- was the only way. The implementation schedule for the new Integrated Library System “Voyager” was fast-tracked and the training and learning schedules would need to keep pace as well. It was understood that some of the learning would take place informally in cluster-based workplaces but it was also clear that this methodology of learning alone would not suffice for a project of this size and complexity.

Organizational context

In November, the ILS Steering Committee established the Training Working Group (TWG) with trainers drawn from each of the modules: OPAC (public web catalogue), circulation, cataloguing, acquisitions, and serials. Most of the TWG trainers were also members of the Library Staff Training and Development Committee with considerable expertise in designing in-house training programs. Given the expert but limited training resources of the vendor and this in-house pool of talent, the TWG determined that the vendor’s training would likely be concentrated at the level of “train-the-trainers” and that the majority of the modular training would be provided by UBC library trainers.

Training plan and structure

Working back from the go-live-date of May 3, 2004, the TWG prepared a training schedule for each module, estimating audience size, level of expertise needed (basic, intermediate, advanced) and the duration of the course for each level of expertise.

Room bookings in the newly furnished “learning space” were staked out for 48 teaching days and registration lists were compiled to ensure that everyone who needed to be trained would be trained in a timely way.

Weekly meetings of the TWG and written action plans ensured continuity, pacing, sharing of plans, materials and expertise. Communications by e-mail between meetings clarified issues. Simultaneously, Steering Committee planners developed workflow policies and procedures and funneled them to the trainers for incorporation into the training design.

Design as focus

Trainers were encouraged to aim their training design at a specific target group - the intermediate level of staff in their particular function. This focus would make the design process manageable, would conserve the energy of the trainers and concentrate the content of the course on essential first steps in operating the new system.

The course design could be expanded to add content for the expert trainee or scaled down to accommodate trainees who needed to know a little about a few things in a particular module. The design would also be readily adaptable for future learning, recognizing the iterative nature of workflow decision-making, the integrated nature of Voyager itself and the probability of Voyager enhancements.

Endeavor trainers customized and modeled the Voyager training designs for the train-the-trainers sessions, modular training, overview sessions and delivered scripts, outlines, handouts, and exercises.

The library's trainers, some experienced, some new, adapted the scripts and training materials to suit their audiences and local workflows. They created templates for course outlines, scripts and a standard "look" for the training materials. They developed handouts, web FAQ's, Viewlets (animated visual demos) and exercises.

Various training and learning methodologies were used: formal train-the-trainer sessions, training sessions modeling typical intermediate-level training designs, face-to-face and telephone consultations between Endeavor trainers and library trainers, facilitated workshops to solve specific organization or workflow issues, planned functional group meetings, ad hoc discussions, and coaching.

The schedule

Two main series of training schedules were planned. The first series of 57 sessions, scheduled between November and March, addressed the learning needs of the following groups:

- experts and trainers, to configure the system, design workflows and learn how and what to train (train-the-trainers sessions by Endeavor)
- general audience, a Voyager overview session for a "bird's eye view" of the integrated system (Endeavor trainer)
- modular training for advanced cataloguing staff, the first group to go live (library trainers) and modular introductory training for serials staff
- general audience, "Windows Tune-up" (library trainer).

The bulk of the schedule for modular training (56 sessions) took place in April/May. OPAC and Circulation trainers alone presented 30 sessions. Acquisitions and Serials trainers commenced training for central technical services staff and, along with Cataloguing trainers, presented intermediate and basic levels of training for branch staff.

<i>Summary of schedule</i>				
	Sessions	Teaching hours	Teaching days	Participants
Nov. - March	57	173	29	777
April - May	56	124	21	805
Total	113	297	50	1,582

The program

In 50 days, 7 Endeavor trainers and 42 UBC Library trainers taught 113 courses to 300 staff members. Staff members averaged 13 hours of learning each, a total of 3895 participant hours. Go-live-day came, the Voyager system worked, staff provided services in Voyager and trainers and learners celebrated.

Wrap-up and sustainability

The Training Working Group continues to support a program of repeat, refresher, and advanced training sessions. A repository of training materials and documentation is being assembled for adaptation to future learning needs. The training plan recognizes that learning is an evolving process, pervasive, cooperative, broad in scope, and that much of the operational training will take place informally in small groups. The design and structure makes all Voyager training, whether formal or informal, more sustainable. With focus, planning, attention and design, learning is accelerated and improved.

Thanks to the Steering Committee for your confidence and support, to the Endeavor and UBC Library trainers for your creativity and durability, and to the Training Working Group for your guidance and expertise.

Margaret Friesen, Chair, Training Working Group

Training Working Group Members:

Sheryl Adam, Information Services

Tim Atkinson, Library Administration

Doug Brigham, Systems

Danielle Bugeaud, Cataloguing

Carol Elliott, Ambit Consulting

Margaret Friesen, Humanities & Social Sciences (Chair)

Tomoko Goto, Asian Library

Kat McGrath, Serials

Jane Shinn, Circulation

Elaine Thorson, Acquisitions

Rick Welch, Technical Services

Appendix: List of trainers

Postscript

During the Voyager training phase, library services and other training activities did not stop. The staff training and development program continued to support a learning program that responded to individual and library needs.

In-house training activities (110 teaching hours) covered the topics of e-resources, chat reference, cataloguing, collections, reference services, instruction, two series of the Library Overview Training Series and “boot camp” for graduate academic assistants.

Campus venues provided learning opportunities for 89 participants and off-site venues provided a wide range of learning opportunities for another 131 participants.

Margaret Friesen, Staff Training and Development Coordinator

Appendix: Staff Training and Development Program Participation 2003/4
(year ending March 31, 2004)

Courses	Sessions Numbers	Teaching Hours	Participants Numbers	Participants Hours
A. Cross-unit In-House				
Cataloguing	9	18	9	18
Collections - Vendors	2	4	30	45
Collections - Vendors-eresources	7	12	110	165
GAA	35	35	300	300
Information/Reference	10	15	284	426
Information/Reference - chat vendors	3	6	45	90
Instruction	2	4	35	70
Library Overview Training Series	8	9	161	270
Round table conference reports	1	1	12	12
SLAIS/Library Dist Speakers	4	6	105	158
Subtotal:	81	110	1,091	1,554
Voyager - Endeavor	35	133	554	1576
Voyager - Windows	8	8	69	69
Voyager - modular	10	25	143	363
Subtotal: Voyager	53	166	766	2,008
Subtotal A: In-house	134	276	1,857	3,562
B. Campus Venues				
Continuing Studies	18		18	
Org. Training & Development	29		58	
TAG	8		8	
Other campus	5		5	
Subtotal B: Campus	60		89	
C. Off-site Venues	106		106	
D. Off-site Librarians Travel	25		25	
Subtotal: B, C, D			220	
Total Participation	325		2,077	
Summary:				
Percentage of participants: in-house (1857/2077)			89%	
Percentage of participants: campus/off-site (218/2077)			11%	
Hours of instruction in-house per fte			12	
Group teaching hours in-house			276	
Number of trainers: in-house			50+	
Courses taught on campus: sessions				
TAG, WebCT	5			
To students/faculty campus-wide	1,518	sessions	29,226	participants

Learning by design 2: beyond go-live day with Voyager

Library Staff Development and Training Program Annual Report 2004-05

Go-live day arrived May 3, 2004 --- the Voyager system worked, staff provided services in Circulation and the OPAC, and 42 trainers and 300 learners celebrated together on May 20th.

By this time, learners had attended 113 courses in 50 days, averaging 13 hours of learning each. From May to July, training took place primarily behind the scenes, in 20 advanced sessions for experts in Acquisitions, Serials, Cataloguing and Circulation.

Between October and December, the Endeavor trainers returned in person and via WebEx to present 5 sessions on customized reports, XML/XSL, Unicode and EDI. At the same time, acquisitions, systems and bibliography staff geared up to learn EDI and the iApprove (Coutts) online ordering system.

		Voyager and iApprove		
	Sessions	Teaching hours	Teaching days	Participants
In-house April-May	56	124	21	805
In-house trainers May-Dec	20	48	11	227
Endeavor trainers Oct-Dec	5	33	7	37
<i>Voyager total</i>	<i>81</i>	<i>205</i>	<i>39</i>	<i>1069</i>
iApprove (Coutts)	9	15	4	105

Follow-up coaching within units was not formally tracked but it has been estimated at a minimum of 50 hours of supervisors' time in processing functions between April and July alone.

Other staff development and training activities continued as well, with 49 courses presented in-house on a variety of topics. Campus venues provided learning opportunities for 177 participants and off-site venues provided opportunities for another 151 participants. See appendix for details.

Margaret Friesen
Library Staff Professional Development and Training Program

Appendix:
Activities and participation 2004/5 (year ending March 31, 2005)
Special events 2004-05

Courses	Sessions Numbers	Teaching Hours	Participants Numbers	Participants Hours
A. Cross-unit In-House				
Voyager - Endeavor	81	205	1069	2624
EDI/iApprove	9	15	105	170
Subtotal Voyager and iApprove	90	220	1174	2794
Other in-house:				
ACRL/ARL/EL webcasts	5	10	69	138
Collections - e-resources	3	3	95	95
Collections - Vendors	6	2	30	30
eLibrary Committee	1	1	24	24
EndNote	1	1	4	4
GAA Orientation	20	35	200	350
Information/Reference - eHelp	2	2	31	31
Library Human Resources	2	8	43	172
SLAIS/Library Dist Speakers	7	11	35	35
Statscan	1	2	2	4
W. Kaye Lamb Lecture	1	2	100	200
Subtotal Other	49	77	633	1083
Total A: In-House *	139	297	1807	3877
B. Campus Venues				
Continuing Studies			13	
Org. Training & Development			71	
TAG			15	
Other campus **			78	
Total B: Campus			177	
C. Off-site Venues			151	
Total all participants:			2135	
Summary:				
Percentage of participants: in-house (1807/2135) 85%				
Percentage of participants: campus/off-site (328/2135) 15%				
Hours of instruction in-house per fte = 13				
Group teaching hours in-house = 297				
Number of trainers: in-house = 50+				
* excludes HSS Govt Pubs seminars (weekly), Media workshop				
** Other: University Health & Safety, Health Symposium, SLAIS Colloquia, Xwi7xwa Speakers Series				
D. Courses taught on campus:	Sessions	Participants		
TAG, WebCT	4	100		
To students/faculty campus-wide	1,280	24,068		

Appendix: Special Events 04-05	
Webcasts	Title
June 10, 2004	Institutional repositories
Oct. 4, 2004	Statistics data collection (D. Webster et al)
Nov. 24, 2004	Information literacy on-line (L. Fritz)
March 1, 2005	Teaching, learning and research (S. Wilder)
March 10, 2005	Googlization, digital repositories, distance education, privacy
SLAIS/UBC Library Distinguished Speakers	
April 8, 2004	Rights and vanities: the case for open access (J. Willinsky)
Sept. 29, 2004	Preserving difficult materials: digital, websites and moving images
Sept. 30, 2004	Libraries in the age of Amazoogle (A. Wilson)
Oct. 13, 2004	Reality check: challenges to record keeping (L. Millar)
Feb. 23, 2005	Innovation, integration and interdependence (D. Seamon)
March 1, 2005	Wishful thinking (S. Ellis)
March 22, 2005	Librarianship evolves (J. Janes)
Library	
April 15, 2004	eHelp Virtual Reference Pilot Project (S. Neame)
Sept. 24, 2004	Ehelp and e-resources for business research (A. O'Shea)
Oct. 8, 2004	Introductory Endnote for librarians (H. Colenbrander)
Dec. 13, 2004	Statistics Canada and E-Stat (M. Smith)
Jan. 27, 2005	The W. Kaye Lamb Lecture (I. Wilson)
Feb. 1, 2005	Encompass Resource Access and Encompass Digital Content (C. Quinlan)
Feb. 15/17, 2005	ERA (J. Kirchner)
Feb. 15/16, 2005	CUPE 2950 Collective Agreement and Attendance Management (D. Austin)
March 17, 2005	Google Scholar: what's all the buzz about (L. Campbell)
Vendors	Gibson, EBSCO, Elsevier Science

Participation in Teaching and Learning Annual Report on the Library Staff Development and Training Program 2005/6

A. A new framework for funding library professional development

New guidelines and criteria for funding professional development activities were approved in March 2005 and the program was launched in April.

171 requests for individual activities were approved, as follows:

- 95 approvals for librarians
- 17 for management and professional staff
- 59 for library assistants/CUPE 2950 staff (the majority were funded from the Job Skills Training Program).

Library commitments totalled \$70,000 and Job Skills Training Program funds were approved in the amount of \$11,000. The programs funded 46 events involving travel, 3 online/webcast courses and 122 local conferences/workshops on a wide range of topics and for a variety of knowledge/skills development.

In addition to the paid individual activities above, the program sponsored several group events:

- Library Human Resources
 - Application of the CUPE 2950 Contract (3rd session)
 - New Student Assistant Orientation Workshops (4)
 - Performance Management Workshops (3)
- Library Trends Workshops (2), presented by library staff
- Library-Wide Open Houses (13 sites)
- SLAIS/UBC Library Distinguished Speakers Series (St. John's College)
 - Michael Geist, "Canada's Choice: Copyright, Culture and the Internet"
 - Heather Joseph, "SPARC Futures"

At year end, the ARL Management Institute was being planned.

B. Cross-unit in-house activities - other

82% of all training activities took place in-house and were sponsored, designed and/or delivered by various committees, individual trainers, branches and others. In addition to the above-mentioned events, the following venues attracted over 1,100 participants:

- eLibrary Committee - 4 sessions
- GAA Orientation - 41 sessions (Humanities & Social Sciences, Sciences, Life Sciences)
- IKBLC Liaison Group Update - 2 sessions
- Information/Reference/Instruction Workshops - 38 sessions (various trainers)
- RefWorks - 9 sessions (including several train-the-trainers sessions)
- Technical Services/Systems - 16 sessions (including Meridian)
- UBCO - 27 sessions in public, technical services, collections development (UBCO Transition Committee)

- Vendors' demos - 11 sessions

C. Training partners, collaboration, information literacy

Primary training venues on campus were:

- Continuing Studies
- Organizational Training and Development (MOST courses)
- Teaching and Academic Growth (TAG)

The Library collaborated with SLAIS in sponsoring two series: SLAIS/UBC Library Colloquia and SLAIS/UBC Library Distinguish Speakers Series. The Irving K. Barber Learning Centre sponsored 5 webcasts in partnership with campus and off-campus organizations (see list at <http://www.ikebarberlearningcentre.ubc.ca/ikblc-webcast.html>).

In addition to attending sessions on campus, librarians and other staff members taught courses in TAG, SLAIS, provided face-to-face demos/consultations at the University-Wide Orientation sessions and other campus orientation venues, and taught 26,515 students and faculty members in classrooms and labs in the Library and in departmental facilities.

D. Summary

The library's teaching and learning program in 2005/06, for staff and for users, is summarized, as follows:

- 1,735 library participants at 379 training sessions
- 75+ library trainers
- 26,515 student/faculty attendees at 1,455 classroom/outreach sessions

Thank you to the 75+ trainers in 2005-06 for your expertise and dedication in presenting these programs.

Appendix A: Library Staff Development and Training Program, Participation 2005/06

Appendix B: Special Events (a Partial List)

Prepared by Margaret Friesen

Co-Chair, Library Staff Development and Training Program

Library Staff Development and Training Committee:

Deborah Austin, Co-chair, Chris Ball, Margaret Friesen, Co-chair, Anne Miele, Leeta Sokalski

Appendix A
Library Staff Development and Training Program
Participation 2005/6

Courses	Sessions Numbers	Teaching Hours	Participants Numbers	Participants Hours
A. Cross-unit In-House				
eLibrary Committee	4		128	
Collections - Vendors	11		116	
GAA Orientation	41		339	
IKBLC Liaison Group	2		70	
Information/Reference/Instruction	38		277	
Library Human Resources	8		181	
Library Trends	2		39	
Library Wide Open Houses	13		27	
RefWorks	9		59	
Technical Services/Systems	10		61	
UBCO	27		108	
Webcasts	2		16	
Total A: In-House	173	260	1421	2132
B. Campus Venues				
Continuing Studies	6		6	
Org. Training & Development	46		46	
SLAIS/UBC Library Colloquia	15		75	
SLAIS/UBC Library Distinguished Speakers	2		60	
TAG	8		8	
Other campus *	10		u/a	
Total B: Campus	87		195	
C. Off-site Venues	119		119	
Total sessions/participants	379		1735	
Summary:				
Percentage of participants: in-house (1421/1735) 82%				
Percentage of participants: campus/off-site (314/1735) 18%				
Hours of instruction in-house per fte = 8				
Group teaching hours in-house = 260				
Number of trainers: in-house = 75+				
* Other: University Health & Safety, Health Symposium, etc. sessions est.				
D. Courses taught on campus:	Sessions	Participants		
TAG, WebCT, University-Wide Orientation, SLAIS/Library Colloq, etc. est.	15	480		
To students/faculty campus-wide	1,440	26,035		
Total:	1,455	26,515		

Margaret Friesen
prof dev\annual report 05-06\participationsummary.xls

5/19/2006

Appendix B

Special Events (a Partial List)

eLibrary Committee

D-space (Fleishauer, Hives)
Functional Requirements for Bib Records (Andrews)
Google Scholar (Hives)
Instant Messaging (Millar, Neame, Ure)

GAA *Boot Camp*, August 29-September 2, 2005

IKBLC Liaison Group Update (Neame, Poole, Quinlan)

IKBLC Webcasts

Diabetes Research 2006, March 11, 2006
Living the Global City Series:
 Archi-tising: The Culture of Selling Condominium Vancouver, Nov. 15, 2005
 The Participatory City, Nov. 21, 2005
The Irving K. Barber Learning Centre - Phase 1 Official Opening, Oct. 3, 2005
BC Regional Community Service Learning Conference, June 17, 2005

Information/Reference/Instruction Training and Development

Arts Outreach (Colenbrander)
E-journals (Adam, Kirchner, McGrath)
Government Publications Resources (Luebbe, etc.)
Government Publications Roundtable on UN Publications (Friesen)
Humanities & Social Sciences Instruction Tune-ups (Adam, etc.)
Map Refreshers (Ross)
Nesstar Pilot (Luebbe, Lesack)
Science Outreach (Lindstrom)
Sciences Cross-Training (Adcock, Taylor, Greenwood, etc.)
Simon Fraser University Instruction Librarians - Exchange (Humanities & Social Sciences, Adam, Giltrow, etc.)

Library Trends

Currents and Convergence (Colenbrander, George, Hintz)
Data Services Models and Trends (Luebbe, Lesack, Messer)

SLAIS/UBC Library Colloquia

Practicum and Coop (SLAIS students)
The Digital Divide (Dowding, SLAIS)
Libraries and Open Access (Colenbrander, HSS and others)
FBI and Patron Records (Airolti, SLA, SLAIS)
School Libraries (Naslund, Education, and Wilson, MacMillan)
Taiwan Archives (Chang, NAC)

Public Memory, Archival Memory and Advocating Archives (Cox, U of Pittsburgh SIS)
Indexing and Information Needs (Mai, U of Washington Information School)
Librarians as Censors (Curry, SLAIS)
There and Back Again (Pearson, author)
Archival Description and the Apparatus of Authenticity (MacNeil, SLAIS)
InvisibleTexts: the Screenplay in Literary Culture (Mota, English)
Qu'est-ce que la documentation? (Day, Indiana University)
Getting Personal: Personalization of Support for Interaction with Information (Belkin, Rutgers)

SLAIS/UBC Library Distinguished Speakers Series

Canada's Choice: Copyright, Culture and the Internet (Michael Geist)
SPARC Futures (Heather Joseph)

Town Halls

Budgets (Tee, Ward)
Merit Awards Forum (Ward)

University-Wide Orientation (for new staff), bi-monthly (Atkey, Dunbar)

Vendors' demos

Coutts
CSA Illumina
EBSCO
Euromonitor International
Gibson Library Connections
Harbour Publishing
Proquest
Thomson Scientific

Participation in Teaching and Learning 2006/7

Annual Report on the Library Staff Development and Training Program

1. Staff Development

a. Individual training/development requests

132 requests for individual activities were approved, as follows:

- 78 approvals for librarians
- 9 for management and professional staff
- 45 for library assistants/CUPE 2950 staff (the majority were funded from the Job Skills Training Program)

Library commitments for these individual events totalled \$72,687 and Job Skills Training Program funds were approved in the amount of \$8,941. The programs funded:

- 60 events involving travel
- 6 online/webcast courses
- 66 local conferences/workshops on a wide range of topics and for a variety of knowledge/skills development purposes.

In addition to the paid individual activities above, the program sponsored several group events:

ARL Management Institute (a two-day course, 17 attendees)

Communications: Across the Desk, Across the World (3 sessions, 46 attendees)

Library Human Resources: Performance Management (2 sessions, 25 attendees)

Library Trends Series Workshops (3 sessions, 53 attendees)

b. Cross-unit in-house training and development activities - other

87% of all training activities took place in-house and were sponsored, designed and/or delivered by various committees, individual trainers, branches and others. In all, 117 events/sessions were reported, with 1,360 participants. It is estimated that more than 40 library trainers taught for nearly 200 hours. See Appendix A: Detailed Summary.

2. Teaching and Learning (Instruction) on campus

In addition to attending sessions themselves, librarians and other staff members taught courses for the Centre for Teaching and Academic Growth (TAG), the School of Library, Archival & Information Studies (SLAIS), presented 7 orientation sessions at University-Wide Orientation sessions (for Organizational Development & Learning), and taught 1,492 sessions to 28,581 students and faculty members in classrooms, labs, in the Library and in departmental facilities. Altogether, library staff presented 1,506 sessions to 28,795 students, faculty members and staff (outside the library).

Summary:

1. Staff development: 1,559 library staff participants at individual and group sessions
2. Teaching and Learning: 28,795 students/faculty participants at 1,506 sessions

Prepared by Margaret Friesen

Co-Chair, Library Staff Development and Training Committee

Appendix A: Detailed Summary

1. Staff Development	Sessions	Teaching	Participants
	Numbers	Hours	Numbers***
A. Cross-unit			
In-House			
Across the desk, across the world	3	9	46
ARL Management Institute Forum	1	1	9
Blogging with movable type	1	1	15
Clickers are coming	1	1	15
Collections - Vendors (various)	11	22	115
Data Library services	4	6	18
Equipment - multifunction	6	6	36
E-resources	2	2	43
Financial training	4	4	60
Google: getting the most out of Google	1	1	19
Graduate Academic Assistant Boot Camp	40	40	355
IKBLC Updates	2	4	55
ILL Software Replacement Project	2	4	20
LibQUAL Project	2	2	19
Library Safety Session	1	3	30
Library Trends Series 3, 4, 5	3	3	53
Map librarianship workshop, conference	2	14	12
Open Access/Institutional Repository	5	5	77
Performance Management	2	6	25
Physiotherapy Outreach (IKBLC)	2	4	46
Reference & Instruction Committee Focus Group	1	2	24
RefWorks	2	4	20
Social Software	1	1	10
Statistics Canada	1	3	5
Systems	3	3	60
Teaching tune-ups	2	6	29
Technical services	8	16	122
UBCO (UBC Okanagan)	4	24	22
Total A: In-House	117	197	1360
B. Campus Venues			
Continuing Studies			10
Online			6
Organizational Development & Learning			23
TAG			11
Other campus *			27
Total B: Campus			77
C. Off-site Venues**			122
Total participants ****			1559
Notes:			
* Other: University Health & Safety, SLAIS			
**Off-site venues: individual, ALA Midwinter, ARL Management Institute, etc.			
***Some attendance #'s are estimated			
****Partial count based on reports received from staff			
2. Teaching and Learning on campus:		Sessions	Participants
TAG, University-Wide Orientation, Orientation-other, etc.		14	214
To students/faculty/non-library staff		1,492	28,581
Total:		1,506	28,795

Staff Training and Development Program, UBC Library			
Appendix : List of programs and courses 1991-2007			
(Note: these documents have been deposited in the University Archives)			
Folder Number	Courses - List:		
15	Courses - Calendars		
16	ARL		
26	CABI School		
17	CircPlus		
18	Colloquium - Kunin		
19	Communications		
		Telephone Communication Skills, 2000/01	
20	Coutts		
21	Disability Awareness		
22-24	DRA/Netcat (Integrated Library System - see Inventory)		
26	E.R. Training Series (electronic resources)		
25	Employee Relations		
26	Financial Management		
26	FOIPOP (Freedom of Information and Protection of Privacy)		
26	GAA Training		
26	Grand Rounds (Woodward Library)		
	Health and Safety 2001 +		
27		Emergency Preparedness	
			Earthquake Preparedness
		Ergonomics	
28			Ergonomics Task Group
29			Courses (3 sessions/year)
30			Risk Assessments
31		Orientation	
31		Personal Safety/Security	
32	In-house - other		
32	Intercultural Communications		
32	Job Skills Training Program		
32	Langara College Library Technician Program		
33	Library Overview Training Series (LOTS) (8 topics, 4 sessions, 2 orientations)		
		November 2002: series 1; May 2003: series 2	
34		Module:	Communication skills
35		Module:	Library Website/University Website
36		Module:	Technical Services/Online library system
36		Module:	Circulation (with Library mission, values)
36		Module:	Computer skills inventory - orientation and checklist
37		Diana Cooper drawings	
32	Library Trends Series		
	Management		
38		Conflict Management	
39		Teamwork	
32	Map Library Conference		

	Courses page 2	
40	MOST courses (University Human Resources)	
41		Program course catalogues, 1993-2000
41		Selection Interviewing
42	Open Houses (orientation program) 2000-2001 +	
43	Orientation program - initial	
44	Peer to Leader (management skills)	
45	Preservation	
46	Referral Skills	
47	Special Events	
		BCLA, Webcasts, Library-wide sessions,
		SLAIS/UBC Lib Distinguished Speakers Series
48	Supervisory Skills	
49	TAG	
50	Technology	
49	University-wide Orientation	
49	Vancouver Community College Oakridge Computer Centre	
49	Vendors - Ebsco, Web2Knowledge, LexisNexis	
	Voyager (Integrated Library System) see inventory	
50		April 2004-March 2005, and undated
51		January 2004-March 2004
52		May 2003-December 2003
53		Participants
54	Voyager - UBCO	
49	WILU	