

» “A library outranks any other one thing a community can do to benefit its people. It is never a failing spring in the desert.” —ANDREW CARNEGIE

Strategic Library™



Issue 6 // June 15, 2014

TRAINING THE 21ST CENTURY LIBRARY LEADER

A review of library leadership training from 1998 to 2013.

BY KATHERINE SKINNER, PHD, AND NICK KRABBENHOEFT

HOW ROI MODELING CAN SECURE FUNDS FOR RFID PROJECTS

Crunching numbers ahead of installation convinced the Beaufort County Council that the investment would benefit staff and patrons. **BY WLODEK ZARYCZNY**

WHO'S GOING TO REPLACE YOU?

Fostering the next generation of librarians through IE LEADS. **BY TIFFANY K. CHOW**

ADVANCES IN CITATION MANAGEMENT TECHNOLOGIES

Can citation innovations shape inquiry and literacy? **BY BUFFY J. HAMILTON**

COMPETENCIES: TAKING THE LEAP, MAKING IT MATTER

Viewing customer service as a strategic initiative requires technical competency from all staff.

BY PENNY TALBERT

When the Books Are In the Way

» What should you do with the books when you're renovating your library?

BY WILLIAM G. OVERTON

For the past 25 years, I have been exclusively moving libraries and have completed well over 600 projects throughout the United States. These projects can be small one-day moves or larger moves that can take months or years to complete.

Any move can be daunting, and emotions can range from creating great memories to never wanting to experience it again. Luckily, since I have



made a career of moving libraries, the vast majority of my projects have been ways be proper planning. To that memorable, fun, and rewarding. I have been end, I have established a methodology that involved in many unique

projects and have gives consistency to the planning process. worked with many great librarians, contrac- tors, and administrators.

DECIDING WHAT GOES WHERE

What have I learned in my career? The Years ago, moving library collections was key ingredient to a successful move will al- not as complex as it is today. During the

Bring in the Experts

While there are other key ingredients to a successful library move, having an experienced library mover or consultant as a part of the team makes life easier for all involved. But there are only a handful of true experts in this field.

When choosing a mover or a consultant, library staff should set high expectations, which must be communicated during the initial interviews. Although the library staff may have a good understanding of their collection, an experienced library mover/consultant will bring a new perspective to the planning process. Keep in mind that every library move is unique, and the key to learning is to first understand what you do not know.

The library staff should be able to receive advice from the mover on collection layouts and fill rates and on cost-saving solutions based on prior library moving experiences. Then, once the library staff settles on a knowledge expert, they still have to convince administrators in finance, facilities, and construction management that hiring that expert is to everyone's advantage—not a simple task.

When making their case, library personnel should emphasize that having an outside opinion is critical to the planning process. The consultant can streamline this process and make the tough decisions that will be needed. Administrators must understand that the consultant will have more experience than the library staff in terms of moving collections. Usually the consultant can reduce the overall planning time by as much as 65 percent, thus enabling staff to continue their own job responsibilities.

renovations and new construction were mainly designed to keep up with the pace of technology. Libraries needed to upgrade the infrastructure of their existing buildings or create a new library facility. As a result, a library's various collections were often static; however, the monograph (circulating) collection was still growing. By simply adding space for this growth, the planning process was not difficult since the goal was to provide more leeway on how each collection could be shelved. The jargon in today's library design centers on "repurposing" the library space. Downsizing the stack areas or moving stacks (books) to different locations

tive. Public libraries, academic libraries, and school or special libraries are all creating flexible work spaces, and the amount of stack space is diminishing.

As a result, the majority of our current projects have been redistributing a library's collection to leave room for additional seating, computers labs, or flexible group spaces. These moves can be complex. With fill rates usually at least 85 percent, there is little room for error.

To plan a move of this type, the library staff must fully understand the size and growth potential of their collections. By understanding these details, they will be able to determine the best location for each material in each collection. Measuring the collection requires a precise breakdown of all

sequence of the mapping (placement) of the collections. It also dictates how much of the current shelving can be reduced to meet the design of the new library. Also, understanding the subdivisions of the collection is paramount to preparing for the move.

In consultation with library staff, we ultimately decided to add additional compact shelving to the building's lower level and to compress the collections that are currently shelved on that level. When planning the collection move four years ago, the library purchased more than 500 double face sections of shelving. Now, in 2014, we had to re-think that plan and add additional compact shelving.

By adding just enough compact

spread throughout the next six months.

In the first two weeks, the plan was to empty the shelving units so the compact shelving could be installed during the two-week March semester recess. Shifting collections and condensing material was the priority. As a result, 154 double-face units were cleared, which created the additional compact shelving system. A crew of eight workers along with hundreds of plastic crates and library carts moved more than 25,000 volumes per day. Although students were not on campus during the move, the library remained open. Daily meetings were established to measure progress, and the library staff was able to retrieve any item within twenty-four hours.



By decreasing the cross aisle from 72" to 42" the library was able to add an additional 13,000 volumes of capacity. The existing shelving was cut from 36" to 30" by the compact shelving installer. This alone saved the library over \$12,000 in shelving costs.



1980s and 1990s, the majority of moves happened because of space limitations for collections. The plan usually called for doubling the stack space, filling 50 percent of the shelves, and leaving the top or bottom shelves empty. The goal was to create enough shelf space for 10- to 15-years of collection growth.

As we entered the 21st century, library sub-classifications of each collection. Physically measuring the books with a tape measure and creating a spreadsheet will establish starting and ending points for all collections.

Together, we have examined the growth potential of journals, documents, and monographs, and the librarians have had to make tough decisions in terms of weeding material. The goal was to have at least eight years of growth, and the fill rates were based upon future buying habits. This initial planning has been an important first step in completing the move, since how the library's collections are measured determines the

within the library is now the main objective. By decreasing the cross aisle from 72" to 42" the library was able to add an additional 13,000 volumes of capacity. The existing shelving was cut from 36" to 30" by the compact shelving installer. This alone saved the library over \$12,000 in shelving costs. Within the library is now the main objective. By decreasing the cross aisle from 72" to 42" the library was able to add an additional 13,000 volumes of capacity. The existing shelving was cut from 36" to 30" by the compact shelving installer. This alone saved the library over \$12,000 in shelving costs.

MOVING DAYS

A move plan was created so that the majority of books and shelving units could be moved during semester breaks. Commencing in January, the move was planned to take place during seven weeks

collection. The library will be faced with a big problem, however, if the entire collection is measured as one, and the design of the new space is generated by that one measurement.

A CASE IN POINT

Our multi-year partnership with Connecticut College is a good example of how planning a collection layout is affected by building design. In 2010, we helped the library plan a shift of its entire collection. That experience helped the library staff understand the need for proper planning and the advantage of having an experienced library move consultant onboard.

Then, just four years later, money became available that enabled the library to embark on an \$8 million renovation with a minimal increase in the library's total square footage. Meetings throughout the past several years have helped the library staff fully understand the new stack space design, which eliminates free standing shelves, and to carefully measure the total linear feet of. During the final phase, in May 2014, the stack layout will be finalized to create the temporary library that will be used during renovation. All books and shelving will have been moved to their final location, and the renovation project will commence soon after.

CASCADING DILEMMAS

Planning this move has taken years to complete, and many hard decisions had to be made, especially in weeding the collections. Understanding the needs of journals, reviewing monographic content in collaboration with colleagues from other institutions, and understanding the long-term

growth potential of each collection were critical steps in the successful reconfiguration of the library's collection.

Measuring material before the weeding process and understanding the capacity of the new shelving on each floor enabled the library to create a plan and communicate the goal of how much material would have to be weeded or moved offsite. Books that were weeded were carefully scrutinized, and the selection criteria were jointly established with assistance from the consortium colleges of Trinity and Wesleyan. Since the full library collection will only be available on a retrieval basis throughout the one-year renovation, a core reference and monograph collection will be established at a temporary library on campus. This temporary library will provide all the services that the students need. As a result of the collaborative effort, "we have been able to reduce our collections footprint by one third," says W. Lee Hisle, vice president for information services and librarian, Connecticut College. In the end, he points out, the library will have added 100 additional study spaces for students, introduced a new technology commons, and quadrupled the number of collaboration spaces.

the entire bound journal collection. In addition, the static Dewey collection was condensed along with Government Documents. By condensing these collections and adding compact shelving, the library was able to establish an 8 year growth rate for their monograph collection.

and faculty, which created a true partnership. Everyone understood the reasoning and each department had a voice, which enabled the library to improve the quality of its collection while maintaining its core educational material. And they were able to create a flexible learning environment that will be sustainable for years. At this high level of planning, it is essential to communicate the plan and to achieve buy-in from all involved. Many personalities may be among the group, and many opinions will be expressed—and they all must be heard and debated. Decisions have to be based on the design of the library's space while remembering that books are still essential to a library's mission. Incorporating these two elements into the final plan will be instrumental in shaping the concepts in tomorrow's library. Planning a library move is



institutions, and non-profits serving the core library sectors (academic, public, special, and archival) provide dozens of institutes, workshops, online and blended programs, and other training experiences each year.¹ These leadership training programs have varied widely, as have their results. Many questions regarding these offerings remain unanswered. Are there identifiable theoretical models and implementation designs of "library leadership programs," and if so, what does each style offer participants? Are models and designs consistent within and/or across sector boundaries? How many "library leaders" have

Training the 21st Century Library Leader

IT'S ALL IN THE PLAN The key elements that need to be addressed when planning a library move have not necessarily changed through the years. The steps have always included understanding the capacity of the final shelf layout, measuring the collections in detail, and using these figures to compute the fill rate. The difference in today's environment is that the process has become more complex when the fill rates range between 85 percent and 95 percent.

The success of the project at Connecticut College was based on communication. The library solicited information from an experienced library move consultant and communicated with administrators

Additional compact shelving was installed on the A Level of the Shain Library. By adding an additional 154 double face units, the library was able to move

a time consuming and daunting experience. By having clear expectations and creating a well-versed team, the staff will experience a stress free, anxiety free—and even fun—library move project. [n](#)

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BY KATHERINE SKINNER, PHD, AND NICK KRABBENHOEFT

Leadership training opportunities for librarians abound in the United States, as evidenced by nearly 40 leadership programs that were offered in 2013 either as one-time (four programs) or ongoing annual/biannual events (35 programs). US-based consortia, individual libraries, academic

been trained under these programs, and to what effects? How are evaluations performed, and which evaluation methodologies most effectively demonstrate the impact of leadership training? This excerpt from a 2014 report released by the Educopia Institute provides a brief history of library leadership training in the US context.² The report is based on data gathered and analyzed in a cross-sector review conducted from November 2013 to February 2014 under an Institute for Museum and Library Services (IMLS) funded project: "The Nexus Project: Spanning Boundaries to Transform Library Leadership" (<http://www.educoia.org/research/nexus>).**

UNDERSTANDING LEADERSHIP

There are many definitions of leadership; the most prevalent over the last thirty years have

carefully distinguished between management and leadership as two different sets of skills, both of which can be learned. As noted by leadership author Warren Bennis, leaders “master the context,” and pay attention to motivation, trust, and long-range perspective, where managers attend to administration, control, and short-range views. Leadership training opportunities currently abound in many environments—from business schools to leadership institutes. Research centers have studied and documented specific leadership competencies required by particular fields and positions, and have designed programs that help attendees build those skills. Among the findings of the early 21st century is the key realization that when leadership development programs are “implemented in isolation of the business environment,” as noted by leaders at the Center for Creative Leadership, they “rarely bring about profound or long-lasting changes; therefore, organizations must develop leaders and leadership competencies that correspond with and are specific to their distinct business challenges and goals.”³ Rigorous evaluation methodologies have been devised and implemented in academic and research environments, and distinct schools and models of leadership training have evolved over the last decades. As training has matured, classroom experiences have been complemented—and sometimes even largely

replaced by—developmental experiences (e.g., coaching, mentoring, team-based work, practicums, 360-degree feedback). Classroom learning is now only one component of leadership skills acquisition; indeed, “increasingly, leadership and leadership development are seen as inherently collaborative, social, and relational processes.”⁴

TRENDS AND HIGHLIGHTS

Between 1998 and 2013, there were at least 39 residential programs, 13 fellowship programs, 16 workshops, and seven virtual programs hosted in the US on library leadership topics (SEE FIGURE 1). Many of these programs have been running for multiple years, for a total of more than 300 distinct events. This substantial number of programs has produced numerous graduates: at least 5,990 from residential, 1,697 from fellowships, 140 from workshops, and 192 from virtual programs confirmed during data collection.⁹ By any measure, this is a significant training output, one that warrants close study to understand who has been trained, to what end(s), by what models, and what effects these programs have had. Several notable findings stand out from this research. First, the diversity of library leadership training opportunities offered today, and indeed, over the last 15 years, is so wide that

meaningful categorization and comparison of programs by “type” or “purpose” is difficult at best. Via the data available, we found only limited consistency in methodology, structure, topics covered, and evaluation of outcomes across programs.²⁰ Second, there is a notable lack of shared objectives or “leadership competencies” driving these diverse offerings and evaluations of their successes/failures. There are no structural relationships between these continuing education offerings, and as a result, there is also no common set of credentials gained from attending programs. Anecdotal evidence, as well as information gathered by specific programs, suggests that a significant subset of library leadership trainees have attended multiple programs to gain the skills training and networks they sought.² This evidence likewise suggests that geography plays a large role in attendee’s program selection—and in the availability of leadership programs for prospective attendees.²² These findings suggest a field-wide need for substantive needs assessments regarding where unmet demand for training is highest, and what competencies are most needed—by individuals, organizations, sectors, and the field as a whole. Using targeted information regarding a variety of factors—geography, library sector, career

» A review of library leadership training from 1998 to 2013.*

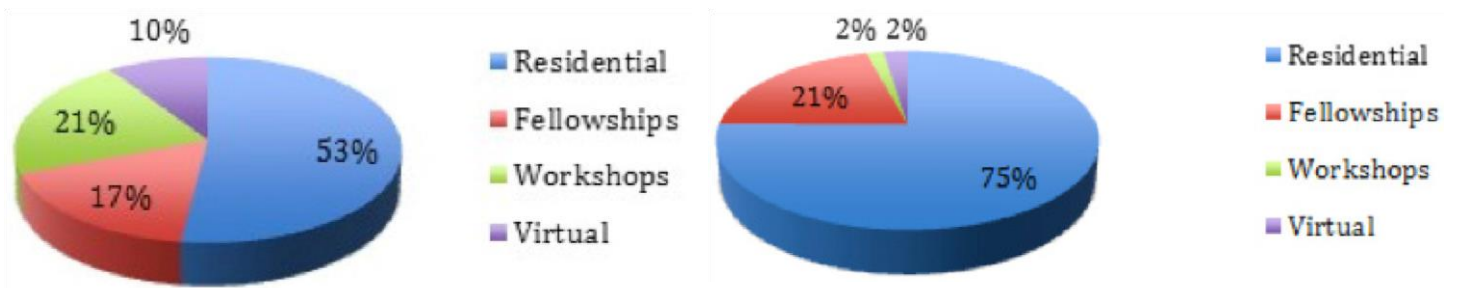


Figure 1: Library Leadership Program by Type

level, and skill types—library leadership programs could begin to define more effectively the specific skills and career transitions they are designed to address, and these offerings could be provided across a continuum that matches more deliberately the existing need base in the US. This shared framework could also enable the creation of common evaluation frameworks and clear expectations regarding the success metrics a program should be able to produce.

ADDITIONAL OBSERVATIONS

The four program types identified by our research team (residential, fellowship, workshop, and virtual) provide an important lens through which we can analyze library leadership training structures and features over the last 15 years. As shown in Figure 2, in our dataset the vast majority (75 percent) of attendees have participated in residential programs. However, workshop (1 percent) and virtual (2 percent) attendees are much harder to track due to limited information in published and web-based forms. Still, the dominance of the residential model stands out, particularly in programs launched between 1998 and 2001 (which also includes 13 residential programs, three workshops, and two fellowships). A closer look at the data shows the growth in diversity of programs from 2001 forward, with the founding of 26 residential programs, 12 fellowships, 11 workshops, and six virtual opportunities. These shifts in programmatic models are addressed through reports and articles written by some of the newer programs. These programs—including ILEAD U (itself a follow-on to Synergy) and the Virginia Library Leadership Academy (VALLA)—deliberately evaluated existing options and made considered choices based on the strengths and weaknesses they perceived in each approach. For example, VALLA’s founders determined that stumbling blocks for residential-heavy programs (4 to 5 days) included the difficulty

Figure 2: Library Leadership Addendees by Program Type

prospective attendees had in affording the travel/lodging/programmatic costs associated with these intensive events, and the similar challenges prospective attendees faced in scheduling a week-long absence from their jobs and/or families.²⁶ VALLA determined that 1 to 2 day residential experiences—paired with self-directed, year-long projects—would enable greater participation in the leadership training experience. Programs are offered to a range of attendees, including general library, early career, mid-career, and senior administration. Of particular interest are the “earlycareer” programs, which are geared toward new librarians in the first five years of their careers. A disproportionate amount of fellowship programs and residential programs are aimed at these early-career participants relative to mid-career fellowship as well as senior administration fellowship programs and residential programs.

This disparity may be due to the increased difficulty many prospective attendees face in carving out a full week from their job (and often family) responsibilities to attend more time intensive programs. Also notable, the early-career programs have a lower average cost-to-participants than most, which suggests that these programs are subsidized by other groups, including funding agencies and library associations. Numerous articles and reports have suggested there is a need, currently unmet, for schools of library and information science and iSchools to add “leadership development” to their curricula. If library school programs provided leadership (as distinct from management) training to their students prior to graduation, this might allow a portion of the funds currently directed towards earlycareer librarians to be redistributed toward other high-need categories, including midcareer and senior administration audiences.²⁷ It also might lay the groundwork to better coordinate and align training opportunities as a vertical curriculum that begins in gradu-

ate school, and then continues through a series of early-career, mid-career, and senior administration leadership training.

LEADERSHIP NETWORK BUILDING

The current lack of coordination across programs and across sectors may represent a significant opportunity to enrich our leadership training environment, field-wide, by providing a nexus between these groups to improve our capacity to create shared direction, alignment, and commitment in service of a higher vision for the field of libraries—one that will help us sustain our work in this critical moment. After all, in a networked world, the leadership advantage often goes to people and groups who can work across sectors and locations with ease. Integrating disparate pieces of information and groups of people is an imperative 21st century leadership skill.

Research on leadership has demonstrated the critical need for spanning boundaries—organizational and sector-based—to encourage strong, visionary leadership. As one example, a decade of research conducted across 12 countries and six world regions by the Center for Creative Leadership showed that most of the important challenges business leaders face today are interdependent in nature. These challenges can be solved only by collaborating across boundaries.³⁴

This emphasis on spanning boundaries closely mirrors IMLS’s finding that collaboration and facilitated partnerships across memory institutions “can dramatically enhance outcomes and organizational change for services provided to the public.”³⁵ It also concurs with the library field’s decadeslong cyber-infrastructure conversations, including numerous publications calling for increased collaboration across the library community.³⁶ It is widely understood that digital infrastructures cannot work effectively if they are built as silos; collaborative efforts are required to build lasting technical channels. However, most of the work in

libraries—digital and non-digital—continues to take place in bounded space, defined by the institution and its type: academic or public, archival or special. This is not to suggest that leadership training should not have sector-specific capacities. Indeed, such

programs as the Peabody Institute (Vanderbilt), the NLM/ AAHSL Leadership Fellows Program, and other in-depth opportunities provide attendees with valuable exposure to the organizational cultures and characteristics of particular institutional forms

(academic libraries or health sciences libraries, for example), including the perspectives and expectations the parent institution brings regarding the role and performance of the library dean or director.

There may be ways to enhance leadership training offerings by marking specific use cases and needs that are met by different designs. For example, one could imagine a strategic vertical alignment of offerings that more deliberately seeks to begin leadership training in graduate schools (such as SLIS, SILS, and iSchools) with a focus on personal growth and understanding of different leadership styles. It might continue with programs geared at cross-sector audiences of librarians in the early part of their career trajectories, and train them in competencies that are needed in common across the sectors. Midcareer and senior administrators might have more sector-specific offerings, but also might have access to some cross-sector networks to cross-fertilize between these communities.

FOSTERING NEXUS POINTS

As leadership experts Chris Ernst and Donna Chrobot-Mason wrote in 2011: “Where disparate groups collide, intersect, and link there is significant potential for a nexus to be created that unleashes limitless possibilities and inspiring results.”³⁷ These nexus points are crucial for providing unified vision across sectors to accomplish high-reaching goals. These nexus points can also be difficult to engineer, in part because boundaries are meaningful mechanisms. They provide us with a coherent sense of identity and purpose. For much of our day-to-day work, boundaries are useful definitional constructs. However, when we bring multiple sectors together with effective facilitation to identify and work on specific, shared challenges, each group has the advantage of seeing its own familiar issues through unfamiliar lenses. Germination across the related communities of a field can quickly free us from bounded thinking, helping us creatively meet our challenges. It can also equip us with a broadly shared vision and implementation strategy that can help to advance the library field as a whole.

* Copyright: 2014 Educopia Institute. The entire report can be accessed at <http://www.educoia.org/publishing/t+21c1l>

** This review included literature (publications and white papers), web-based resources, a targeted survey with library leadership

training programs, and interviews with key thought leaders in library leadership training. The dataset documents the spectrum of offerings that have served four major library communities—academic, public, special, and archival—between 1998 and 2013. Due to time and budget constraints, the dataset upon which these findings are based is currently a beta version. We sought to be exhaustive in capturing US activities and details via available documentation; however, programs that lack accessible, comprehensive written descriptions may not be reflected in this dataset. In our next phase of research, we will further refine the dataset, and we will issue it at the end of the project as an updated version. n

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FOOTNOTES:

¹ No single source documents all of these opportunities, but ALA’s website provides links to the most prominent offerings: <http://www.ala.org/offices/hrdr/abouthrdr/hrdrliasoncomm/otld/leadershiptraining> (last accessed 8-5-2013).

Among the most cited programs are the Frye Institute (now the Leading Change Institute), ACRL/Harvard’s Leadership Institute; ARL’s Fellows programs; Illinois’s new I LEAD U program; and California State Library/InfoPeople’s institutes, but there are dozens of opportunities held across the country every year.

² The decision to constrain this research to the US has been made consciously, due to the limits of time and resources available for this project. We acknowledge that more research needs to be conducted into library leadership offerings, both those hosted in other national contexts, and those that are deliberately international programs. We point to prospective

research directions later in this report. ³ Hernez-Broome, Gina and Richard L. Hughes (2005), “Leadership Development: Past, Present, and Future.” Human Resource Planning. p. 28.

¹⁹ There are also an unknown number of local events hosted by individual libraries that are missing from our dataset and analysis due to the lack of readily available documentation on these typically one-off or internal training opportunities.

²⁰ Notably, our project team did not have access to curricula for most events. However, we were able to compare program features, program missions, evaluations, and other components from both the journal articles and open websites that we mined for such details.

²¹ E.g., 38% of the 2008 Synergy participants noted that they had engaged in other leadership training activities prior to attending Synergy. (See “Evaluation of Synergy: The Illinois Library Leadership Initiative” June 2009.)

²² This last point is worthy of deeper analysis, especially because geographical disparities in leadership training are evident. The vast majority of library leadership education takes place roughly east of the Mississippi River. Due to data constraints, the project did not track the home state of attendees represented in the dataset. The difference in distribution needs further analysis. ²⁶ See http://scholar.lib.vt.edu/ejournals/VALib/v57_n4/pdf/hensley.pdf.

²⁷ Vertical alignment of curriculum offerings is a coordinated process that ensures that staged offerings iteratively and deliberately build upon the knowledge and skills attained in each course. This methodology is most prevalent in medical school environments. ³⁴ Chris Ernst and Donna Chrobot-Mason (2011). Boundary Spanning Leadership.

³⁵ IMLS, Strategic Plan 2012-2016. p 9.

³⁶ See, for example, the Cyber-infrastructure reports for the sciences and the humanities and social sciences, the Blue Ribbon Task Force reports, and the New Roles for New Times ARL report series as just a few among many examples.

How ROI Modeling Can Secure Funds for RFID Projects

» Crunching numbers ahead of installation convinced the Beaufort County Council that the investment would benefit staff and patrons.

BY WLODEK ZARYCZNY

Libraries around the world are facing more demands that require them to engage in more relevant interactions with their respective communities. Library technologies are evolving to support these endeavors.

This scenario was definitely the case for the Beaufort County Library (BCL) system in South Carolina. When implementing RFID

achieved without the library demonstrating return on investment (ROI) for deploying the technology. This is the story of how we successfully turned our libraries around, and how any library can achieve the same results.

RFID and self-service technology for only added to the challenge of obtaining funding for the libraries, since we have more than 30 million library items worldwide now contain RFID tags—the core com-

total, the system has a collection size of a more than 260,000 items, and an annual circulation figure that surpasses 770,000.

The coastal community that the system serves has grown dramatically since 2000, mainly because of residents migrating from the Northeast and Midwest. This factor has



service technology (including automa- ponent of any RFID system. Increased staff parks—to meet the demands of the rapidly ed materials handling and sortation solu- productivity, improved customer service, growing community. tions), we were able to increase efficiencies and higher cost-efficiencies are just some The residents of Beaufort have certain and staff productivity, reduce operational of the benefits that have been cited as key expectations of what they want from a pubcosts, and provide a better level of service drivers for the technology’s demand. lic library. They expect to get in and out of to the communities we serve. However, RFID had been on BCL’s wish list for quite none of these objectives would have been some time. The BCL library system is made

up of four regional branches and one small branch that serve a community of more than 162,000 residents plus thousands of tourists that visit the county each year. In

the library quickly while experiencing high levels of privacy, speed, and convenience. By carefully managing our \$4 million budget, we needed to predict and deliver services that met those expectations and provided high levels of satisfaction.

As much as we were aware of the benefits that installing RFID would bring, it was not just a case of acquiring the solution.

To secure funding we had to justify implementing layout of each library branch is different, so we the technology in our libraries, not only from a wanted to ensure that the placement of any return on investment (ROI) perspective, but also solutions, such as self-service kiosks and return in terms of how we could meet long-term points, were convenient for patrons and would operational and strategic objectives. guarantee the maximum use and number of transactions for the library.

DEFINING OBJECTIVES

Before we could implement the technology, we had to articulate the benefits we wanted to achieve for Beaufort’s libraries. We knew that, first and foremost, we wanted to improve the level of service that we offered to our library users. We would accomplish this goal by offering patrons the option to pay their fines and fees using a range of payment methods and the ability to check out all types of items independently, both print and AV.

In addition, we wanted to increase staff productivity to free staff so they could be deployed to other duties. Specifically, we wanted to streamline and reduce the time it took to manually sort returned items and conduct an inventory, a process that would normally close each branch for three days. We also wanted to reduce the number of missing or misplaced items.

Special attention was given to the placement of the new equipment and how easy it would be for patrons to use. The physical

FROM ROI TO INSTALLATION

Securing funding from Beaufort County Council took some time. However, we were successful after presenting our ROI case to the County Council and backing it up with research we had conducted along with our vendor. Our research was based on visiting each of our library branches along with speaking with libraries already using RFID.

Commissioning Bibliotheca to undertake the project was a no brainer for us. We were impressed with the range of options they offered and the input they provided to help us create a detailed ROI analysis to secure funding for the project. When we first started to think about investing in the technology, Bibliotheca representatives conducted an onsite evaluation of our branches to ascertain exactly what equipment we would need, then produced an ROI report estimating cost savings and a detailed fiveyear forecast plan (SEE CHART).

Based on our evaluation and the company’s ability to meet our objectives, it

Sorting returned items through AMH has improved staff efficiency by reducing the turn-around time to 20 minutes.



was decided that we would install solutions that focused on five key areas: self-checkout, automated materials handling (AMH), circulation, inventory, and security. This decision provided the best cumulative rate of return, with the largest benefit coming from self-checkout and automated materials handling.

About a year and a half later, after successful reviews of our ROI analysis by two County CPA's and the County financial analyst, we were granted the funding to go ahead with the project and implement RFID across all five Beaufort County Library branches.

Installation commenced in March 2011; in total, 13 self-service kiosks were installed across our five branches, with three to four kiosks in each of our regional branches. Also, a full AMH system with five sorting bins was placed in four of our branches with a selection of RFID security gates. The rollout also included a number of staff stations, which allowed us to tag our library items with more than 200,000 RFID security tags and several inventory devices to allow us to better manage our collection.

Completing this project was not without its challenges. For example, not long after the project commenced we learned that our library budget would be reduced by \$1.4 million, which resulted in the loss of 19 fulltime equivalent staff members. Fortunately, through the cost savings and efficiencies achieved from moving to RFID, we were able to

	COST YR 1	COST 5 YRS	ROI YR 1	ROI YR 2	ROI 5 YEARS
Beaufort	\$225,861	\$298,180	-\$97,101	\$144,304	\$480,115
Hilton Head	\$214,490	\$287,834	-\$37,032	\$210,939	\$806,724
Lobeco	\$57887	\$76,740	-\$19,451	\$43,752	\$155,557
Bluffton	\$214,308	\$288,962	-\$58,994	\$178,865	\$656,466
St Helena	\$323,080	\$400,201	-\$125,214	\$176,704	\$581,602
Total	\$1,035,626	\$1,351,917	-\$337,792	\$754,564	\$2,680,464

open a new branch in 2012 and reallocate staff, which has allowed us to better serve our patrons and community through first-class service and improved facilities.

AFTER INSTALLATION

Overall, our move to RFID and self-service has been a great success. The self-checkout function has allowed us to reduce the number of staff based at the circulation desk and redeploy them to other roles and tasks. Specifically, they can now spend more time out on the library floor, attending to and interacting with patrons. We have also been particularly impressed with the increase in



The RFID system has moved the check-in workflow from the library staff to the patron.

love watching the books move through the system. At first, there may have been a few older patrons who felt intimidated by the new technology, but as soon as staff or volunteers showed them how to use the machines successfully they headed straight to the self-service kiosks to check out their items.

It is not just the patrons that love the technology; our staff has really seen the benefits, too. They enjoy the fact that they have more time to assist patrons, especially in terms of quality service offered rather than just the number of patrons they assist. They

now have the flexibility and time to complete other tasks and duties.

ROI LESSONS LEARNED

Looking back, we have had some minor flux in our original ROI forecasts. The deviations have been caused by additional budget cuts and changes in circulation, but our original analysis was fairly accurate. The County has been satisfied with the financial return on the investment as well as the benefits RFID has brought to our libraries and communities.

Our relationship with Bibliotheca was built slowly over time, but it was instrumental in helping us secure our funds and get approval from the County. Based on our experience, librarians planning to move to RFID should be actively involved with their vendor from the very beginning. This interaction will help guarantee the accuracy of your ROI model and will ensure that you achieve the desired results. n

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revenue we have seen from the fines and fees that have been paid at kiosks via credit card. Also, giving our patrons this option has made managing their accounts a lot easier for them.

AMH, for us, is what offers the greatest return from the overall RFID system. The entire check-in workflow has been moved from the library staff to the patron and the machine itself, which has dramatically improved staff efficiency. The AMH process of sorting returned items has reduced turn-around time to 20 minutes; previously, it could take one staff member up to two hours to complete this task. Additionally, prior to AMH, we had three to five staff members checking items in and

then re-shelving items. After AMH, the system checks items in automatically.

Our inventories are now much more streamlined. We no longer spend hours of staff time manually taking stock of our collection. Even better, we do not have to close our branches for long periods of time to conduct these inventories. Furthermore, with the help of our security gates and inventory devices we have greatly reduced our materials lost rate.

Patrons have also seen huge benefits from the introduction of

the AMH systems. The fact that the system can automatically sort items into separate bins by collection has meant that the time it takes to get items back on the shelves and ready to loan has been greatly reduced. As a result, patrons have access to items more quickly, which has also increased our circulation figures. The automated check-in means that items are cleared from patrons' accounts immediately, allowing customers to almost instantly check out new materials and making checked-in items immediately available for holds.

Our patrons have really embraced the new system and feel empowered when they can check out their own materials. Many have commented on how much faster it is to check out their items and that it has reduced the hassle of returning material. Children have been drawn to the new features and are more excited about visiting the library. Teenagers have also had no issues using the new system; they have really adapted to self-service. Our Beaufort Branch has a glass wall for patrons to see AMH in action, and patrons

» Patrons have also seen huge benefits from the introduction of the AMH systems. The fact that the system can automatically sort items into separate bins by collection has meant that the time it takes to get items back on the shelves and ready to loan has been greatly reduced.

Who's Going to Replace You?

BY TIFFANY K. CHOW

Have you ever thought about nurturing the next generation of librarians?

Well, in 2010, the University of California, Riverside (UCR) University Libraries received a grant from the Institute of Museum and Library Services (IMLS) Laura Bush 21st Century Librarian Program to do just that. The grant totaled \$979,259, and it spearheaded the Inland Empire Librarians Educated to Advance Diversity and Service (IE LEADS) fellowship; the grant funding and program will

be culminating in June 2014.

As a result of the IE LEADS fellowship, UCR partnered with other libraries to recruit and educate a new set of library professionals to serve the diverse communities of the Inland Empire and Los Angeles county regions in Southern California. In addition to paying for tuition and course material costs towards a Masters in Library and Information Science (MLIS), IE LEADS provides paid internships at partnered community college libraries, law libraries, public libraries, and university libraries.

IE LEADS also offers an outstanding mentorship program and professional development opportunities for their fellows, which include stipends to travel to and from professional conferences. To date, 39 individuals have been supported by IE LEADS, 20 of whom have presented at professional conferences. In addition, 25 fellows have obtained their MLIS degree, and of these 25 individuals, 20 have attained professional positions in the field.

APPLYING FOR AND RECEIVING THE GRANT

The IE LEADS project directors, Patricia Smith-Hunt and Julie Mason, along with Ruth Jackson, UCR's former University Librarian (Steven Mandeville-Gamble now holds that post), first learned about the IMLS Laura Bush 21st Century Library Program through a UCR library staff member who

» Fostering the next generation of librarians through IE LEADS.



The class of IE LEADS fellows, aspiring library professionals working toward a MLIS degree.

was interested in attending library school (she is a recipient of IE LEADS and is now a librarian at UCR). The Laura Bush 21st Century Librarian Program “supports projects to recruit and educate the next generation of librarians, faculty, and library leaders; and to support early career research. It also assists in the professional development of librarians and library staff.”¹

According to *U.S. News & World Report*,² UCR has the 12th most diverse colleges in the nation; the Inland Empire area of Southern California is just as diverse. However, at the time of applying for the grant, UCR only had a handful of librarians identified as a minority, which obviously did not reflect the diversity of the community.

Smith-Hunt and Mason conducted a survey and found that minorities in the Inland Empire area were also not represented at other institutions (the libraries that participated in the survey would later become IE LEADS partner libraries). Therefore, the main goal of the grant design was to

- discuss professional accomplishments, community service, or academic record;
- An endorsement form signed by one's library administrator, an academic advisor, or faculty member;
- A personal statement that discusses: reasons for pursuing the MLIS and how it will contribute to the needs of a diverse community, evidence of commitment to diversity, and any special skills they will bring to the field; and
- A student service requirement form, which points out the expectations of all selected fellows.

ABOUT THE FELLOWS

To date, IE LEADS has supported 39 individuals as they worked towards an MLIS. As previously stated, 25 fellows have completed their MLIS degree in an average time of two years and eight months. Of the 39 fellows, 20 have presented at professional conferences such as the American Library Association, California Library Association, and the California Academic and Research Libraries Association. Fellows have estimated saving, on average, more than \$15,000, and one fellow claims the program was, “absolutely instrumental” in helping her complete her studies in a much shorter time. About 73 percent of fellows claim that they would have attended library school even if they did not receive funding. One fellow mentioned, “I would have gone to library school either way, but without IE LEADS, I might still be attending school...I was able to attend school every semester and even take two classes per semester because I had the funds to do so.”

EDUCATING NEW LIBRARIANS

Based on a preliminary questionnaire, fellows have mentioned that the top three qualities they enjoy most about IE LEADS are the networking opportunities, the mentorship program, and support from peers. The program allowed many fellows, who went to school online, to have a support system comprised of library students, library staff, and librarians. That is, IE LEADS fellows (and perhaps online students in general) were not receiving the same support as brick-and-mortar students may receive in class with their cohort. IE LEADS allowed online (and a few brick-and-mortar) students to come together and discuss librarianship and library

increase the number of under-represented minorities or those who wished to promote diversity in librarian positions to improve library services for an ever-growing diverse community.

It is important to note that in regard to the IE LEADS program, diversity “may include but is not limited to race, culture, ethnicity, gender, age, religion/faith, socioeconomic background, physical abilities/qualities, sexual orientation, and linguistic ability.”³ To apply for a fellowship, applicants must have been “currently enrolled or have been accepted into an ALA-approved library school;” “employed either full- or part-time at one of the Inland Empire LEADS partner, affiliate or regional libraries;” or be a “graduate student or graduating senior currently enrolled at one of the partner, affiliate, or regional institutions.”⁴

Candidates submitted an application packet, which consisted of an application form, resume, and the following:⁵ • Two letters of recommendation that

school in a very supportive environment. For example, if an online student was having problems

with a particular homework assignment, he or she was able to ask a variety of other fellows or librarians for advice on resources to consult.

WORKSHOPS AND NETWORKING: Fellows, mentors, and librarians of affiliated and partnered libraries meet about once a quarter during a workshop, which may focus on the changes in libraries in the 21st century or on diversity. For example, fellows have toured law, public, and academic libraries and have participated in workshops on promoting diversity and on becoming active in the library field, including presenting at conferences, joining professional associations, and serving on committees.

The most important and useful workshops may be those that focus on obtaining a professional position. IE LEADS has held “career fests” during which seasoned librarians and search committee veterans provide advice on the do’s and don’ts during a job search, look over fellows’ resumes and cover letters, and provide tips and insights on how to better prepare for a career in librarianship.

One fellow stated that, “IE LEADS allowed me to tap into a network of information professionals that I would have not otherwise had the chance to interact with.”

MENTORSHIPS: Every IE LEADS fellow is paired with at least one seasoned librarian in a mentorship program. It’s important to note that, because of the networking opportunities that IE LEADS provides, many fellows actually have a number of unofficial mentors who also provide advice. This interaction allows fellows to pick the brains

The connections the students made through the IE LEADS program put them at an advantage when applying for positions.

of multiple professional librarians on their work in the field.

Fellows are paired with their mentor based on a questionnaire in which they discuss what their interests are in the library profession. Mentorships are critical for fellows in that library school students often have professional questions but do not know who to ask for help. By having a mentor, a fellow is able to ask someone that he or she trusts and knows will have the resources to answer specific questions. In addition, fellows are able to ask mentors how they got to where they are now. One fellow mentioned, “IE LEADS partnered me with two experienced mentors who guided me through my career planning.”

PAID INTERNSHIPS: To better prepare for the job market, fellows are required to complete an internship at one of the affiliated IE LEADS libraries. The internships benefit both the fellows as well as the libraries in a variety of ways. For example, interns are able to gain amazing hands-on experience, which provides necessary library skills and experience. In addition, after the completion of a 90-hour internship, fellows are compensated with a generous stipend. Each library that hosts an intern is also rewarded with intelligent, creative, and highly motivated interns who are able to contribute excellent ideas and creativity that can be sustained in the future.

For example, in a public and law library setting, fellows have completed reference work, created well-attended programs for children and adults, created finding aids for special collections, assisted with special



IE LEADS fellows meet with a mentor to discuss librarianship and their studies

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FOOTNOTES:

¹ Institute of Museums and Library Services. (2013). "Laura Bush 21st century librarian program." Retrieved from <http://www.ims.gov/applicants/detail.aspx?GrantId=9>

cataloging projects, collected data to serve the community more effectively, and assisted with collection maintenance and weeding projects. In an academic setting, fellows have processed, handled, and digitized special collection materials, created metadata for digital objects, assisted with collection development, resolved errors in findings aids using Encoded Archival Description, provided instructional research workshops for undergraduate students, and created instructional screencast tutorials. These skills have given fellows an edge in the job market and have helped them tremendously when searching

for a professional position. To date, three fellows have been hired at their internship site as professional librarians.

IT'S PERSONAL

As a recipient of the IE LEADS fellowship, I know first-hand that it is a wonderful program that other libraries should consider adopting. If it was not for my mentors, the networking opportunities, and my internships (two of which I completed at IE LEADS affiliated libraries), I strongly believe that my skill set would not have allowed me to secure a professional

² *U.S. News & World Report*. (2013). "Campus ethnic diversity: National universities." Retrieved from <http://colleges.usnews.rankingsandreviews.com/best-colleges/rankings/national-universities/campusethnic-diversity>

³ Inland Empire Librarians Educated to Advance Diversity and Service. (2011). "Diversity statement." Retrieved from <http://library.ucr.edu/?view=ieleads/diversitystatement.html>

⁴ Inland Empire Librarians Educated to Advance Diversity and Service. (2011). "Who can apply?" Retrieved from <http://library.ucr.edu/?view=ieleads/whocanapply.html>

⁵ Inland Empire Librarians Educated to Advance Diversity and Service. (2011). "How to apply" Retrieved from <http://library.ucr.edu/?view=ieleads/applicationpacket.html>

position in such a short time following graduation. The in-person connections I have made with other library school students and librarians have put me (along with other fellows) at an advantage when applying for positions or preparing for interviews. For example, I was able to have a number of librarians proofread my resume and cover letters when applying to jobs and had even more librarians give me advice when preparing for interviews.

The entire IE LEADS program is a strong

support system, which is filled with students, library staff, and librarians who are really pushing to nurture and advance the next generation of librarians. n

» IE LEADS has held “career fests” during which seasoned librarians and search committee veterans provide advice on the do’s and don’ts during a job search.

Advances in Citation

Management » Can citation

innovations

Technologies shape inquiry

and literacy?

BY BUFFY J. HAMILTON

Two years ago, I adopted EasyBib, a bibliography generator, as the primary citation subscription service for my library at Creekview High School in Canton, Georgia. I selected this service for a multitude of reasons, but the driving factor was to spend less time teaching the mechanics of citations to students and teachers and more time helping them dwell on research projects from an inquiry-oriented stance. Our library always had high database usage statistics; however, those numbers did not always translate into finding those database articles integrated into student projects and papers to the extent we would have expected given the high number of hits. I knew from

past observation that the primary reason that they did not appear was the amount of time and struggle it took for students to create entries using the database wizard with another citation tool. While I very much liked the original citation tool we had been using, NoodleTools, our students did not have enough prior knowledge or usage for it to be the best fit for them as learners.

Within the first year of adopting EasyBib, we noticed some significant changes:

- Students were not only citing more database sources in their bibliographies, but they were also incorporating more of the database content into the body of their papers as both paraphrased and directlyquoted material.

- Because less instructional and working time was spent on citation mechanics, students were spending more time reading their articles critically and reflecting on the content individually and with their peers in small groups.
- Teachers were more willing to devote longer chunks of time and take more of an inquiry stance on research projects since they knew the citation piece of the learning experience would be more seamless and would not take as much time for students to complete.
- Teachers were able to invest more time in designing inquiry driven projects using the Stripling Model of Inquiry (<http://tps.govst.edu/PDF/StriplingModelInquiry.pdf>). Helping them move along that continuum

was exciting and energizing; for some teachers, it was also a pathway to pushing back against the pressures of testing.

SUCCESS AND EXPANSION

When we adopted EasyBib at Creekview High, the teachers and I thought we had jumped light years ahead by being able to download .ris files to then import into EasyBib. I have vivid memories of students AND teachers clapping when I showed them this fast new method that felt like a revolution in citation.

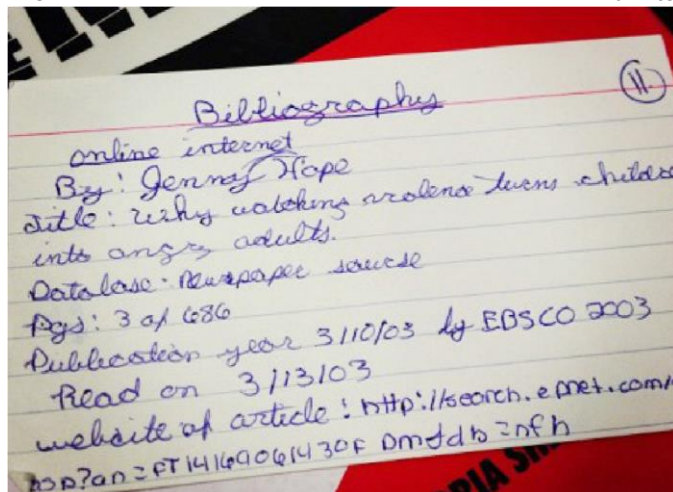
In the fall of 2012, we saw a glimpse of the next wave of citation innovation when we experimented with Sage databases and saw, through one-click integration, the direct export of the data for the first time with EasyBib. Not that it was terrible to download the .ris file with the publication data and then upload it to EasyBib, but to see that citation could be done so seamlessly in one click was a tantalizing possibility to imagine for other databases.

In August 2013, I joined my colleague Jennifer Lund as a librarian at Norcross High School; we were overjoyed when we learned that Gale Virtual Reference Library and Gale Literature Resource Center had been re-configured to offer the ease of one-click citation export and integration with EasyBib (<http://content.easybib.com/gale-integration/#.U3EK5vldWAh>). That feature was then enhanced to be even a little cleaner and more aesthetically pleasing in December.

Our only disappointment at the time was that the feature was not yet integrated

into our Gale in Context databases. Because we are fortunate to have access to quite a few of these databases in that particular series, we often felt frustrated trying to explain to our students why the one-click integration was available in some Gale databases but not in others.

For young teens who did not have the same schema we did as experienced researchers, this discrepancy was sometimes difficult for them to grasp even though we had created tutorial videos to reinforce the “how to” steps we showed in person (see



videos and tutorials at <http://bit.ly/1nmlUMv>).

Worse, this feature was not only missing from the EBSCO databases that we were using as part of our research guides, but the direct export feature failed to deliver the file with the .ris extension essential for EasyBib to read the data file. Students had to remember to rename the file and add the .ris extension. For fledgling researchers, these differences for exporting citations from one

database to another, even those under the same publisher, were sometimes challenging to remember.

STEPS AHEAD

As of March 2014, the beautiful one click citation feature is now available in all the Gale In Context databases [insert citationfigure1.jpg]. I literally felt like dancing around the library when I discovered the platforms had been migrated, and sooner than I anticipated! Some students came into the library that morning and said, “Ms.

Hamilton, did you know Student Resources in Context now has that one click choice?!” Jennifer and I were beaming as we discussed the ways this small but important change might help us in our larger efforts to reframe and transform research experiences at NHS as acts of inquiry across the curriculum.

Are you also facing these challenges: a large student body and faculty with a premium on space and time for research, both within the library and the school building at large, in light of curricular and testing mandates? A technology that is seemingly so

simple can be a catalyst for better budgeting of time for research instruction. Now that we will have consistency in citation export within our suite of Gale databases, we anticipate less confusion with this piece of research and more student confidence in using both the databases as well as EasyBib. Since we will be spending fewer hours explaining why there are differences in the steps for exporting the citations, we plan to spend more time incorporating learning experiences that will give students time to engage in deeper inquiry and to think more deliberately about their research and composing (in whatever format the final product takes). Of course, we hope that EBSCO will transform their direct export feature soon to be consistent with the Gale experience our students now have.

Catalysts for richer learning experiences can shift perceptions about research as a one-shot activity to something that is a natural part of an inquiry-driven culture of learning [insert citation-figure2.jpg]. A school’s culture, collaborative partnerships and strategies, the design of physical spaces, testing and curricular mandates, and pedagogical shifts are all important points of access to reimagining the possibilities of



research as an integral part of inquiry-driven learning experiences.

CITATION TIMELINE

As we try to help our students acquire the academic capital and citizenship skills they need as learners who attribute and share information in appropriate and ethical ways, I wonder how shifts in citation technology will affect learners and research experiences in ways we don't yet foresee. Think about how approaches to citation have changed in your own lifetime because of the technologies available for both citing and accessing digitized information sources.

I honestly don't remember much about crafting bibliographies as a newbie researcher in my junior year of high school, although I have vivid memories of painstakingly crafting footnotes, a tedious task. In my senior year as well as in my undergraduate years, I relied heavily on the MLA handbook and resources provided by teachers and professors.

When I began teaching English in the Cherokee County (Georgia) School District in 1992, my students used index cards and the MLA handbook to cite sources. By 1999, when

I was a technology specialist in the district's Technology Services department, a free version of NoodleTools had arrived on the scene, and I was tinkering around with that platform before moving to a paid version purchased by the district.

As a graduate student between 2001 and 2005, I relied heavily on my NoodleTools subscription to help format my citations for scholarly research; at the same time, I began incorporating NoodleTools into my instruction at Cherokee High, first as an English teacher and then as one of the school's librarians. I marvel when I think about the changes in citation technology (or lack thereof) and how it affected my work as a teacher and researcher over twenty years. I can't help but wonder what the implications are for students (K12, undergraduate, and even graduate) who do or do not have access to these technologies for research and learning. Important questions come to mind:

- How does access to citation technologies affect the learning experience and students' information literacy skills? How do they affect the ways people compose research-based writing and literacy practices as

readers of informational texts in a variety of mediums and formats? What does the lack of these experiences mean for the future of student research efforts?

- How does a reduced emphasis on the mechanics of citation change people's perceptions and connotations of "research?"
- How does access, or lack of access, to these technologies affect literacy?

I'll be pondering these questions as I continue to think about the ways libraries function as sponsors of literacy (<http://dmlcentral.net/blog/5238>) in their communities and learning ecosystems. n

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Competencies: Taking the Leap, Making it Matter

» Viewing customer service as a strategic initiative requires technical competency from all staff.

BY PENNY TALBERT

As library services evolve, the relevancy of public libraries will be determined,

how vital this program was to the excellent service we'd been trying so hard to provide.

During *23 Things*, we held an in-service day and rotated groups among the library managers, who trained staff on everything from how to use Windows 8 to how to navigate the library's website. Survey results from this training made it clear that we were on the right track. A culture shift was occurring, which leaned heavily towards collaboration and teamwork.

Following *23 Things*, we initiated virtual book discussions. Each week, staff was assigned to read a chapter from the book, *Defusing the Angry Patron: A How-To-Do-It Manual for Librarians* by Rhea Joyce Rubin.

on LibGuide. Employees gave very positive remarks about this experience and have requested that we select another library-related book to discuss.

After the book discussions, we moved onto *23 Things Reference*, another program developed by the library's leadership team. Each week, we focused on a different online reference site with a weekly assignment. Some weeks, the assignments would include posting comments for the group; during other weeks, staff members were asked to complete an assignment and submit it via email. We also covered important customer service issues such as

in part, by the competency of the library staff and the excellent customer service they provide. Other factors contribute, of course, all of which include money. Decreasing continuing education opportunities for library staff has left some poorly prepared for the onslaught of technology-related questions from patrons. In 2011, The Ephrata Public Library management team took a step back to evaluate the patron experience in our library. We quickly learned that, while we had a friendly staff, they were not confident when assisting patrons with technology questions. They'd fallen into the all-too-typical habit of just referring patrons to members of the staff who had more technology experience.

After realizing how often this hand-off occurred, we conducted a staff survey, which included basic computer questions as well as questions about services offered by the library. The surveys were anonymous in the hope that staff members would give truthful answers and not feel obligated to exaggerate their skills. The results of this first survey were not good...not good at all.

FIRST STEPS

To start prompting staff to explore technology beyond or outside of their immediate sphere of influence, we slowly introduced *23 Things*, a weekly online training program reviewing our library resources. The "Things" included online resources and online services provided by the library. Lessons were assigned, along with activities associated with the skill or information. It was exciting to watch staff members begin to understand

Discussions took place on a message board

conducting a reference interview and writing citations.



Ephrata Public Library employees spend a Saturday night out at the bowling alley. Team building has become a part of the library's culture.

Ephrata Public Library staff members.

CREATING COMPETENCIES

Following these initial steps, the management team introduced a competency program. Many competency lists are floating around the Internet, but we found that the most useful ones were those tailored to our library.

To devise your own list, I'd recommend sitting in front of the circulation desk for a couple of days. Observe what patrons are requesting and how staff members assist with research and technology, including the online services offered by the library and navigating the library's website. In addition, is staff able to download apps for online services and successfully use technology for research. Competencies have to be very clear. For instance, one of our competencies is that staff will be able to download and navigate all apps that are available for services offered by the library. We are specific on which apps are available so that employees have the information they need to be successful. It is of the utmost importance that you don't assume staff has experience with any particular competency and offer a place to master each skill. For each skill, training opportunities need to be available, including online options such as webinars or tutorials. Whatever standard competencies you establish, the program must be completed by everyone who interacts with the public in any way—and everyone must be tested. This policy requires library management to be as knowledgeable as the employees who work the circulation desk.

CREATING POLICIES

One of the most important parts of developing a competency program is making sure you



have buy-in from your board of directors. If you have a friends' committee, their support is also helpful. We needed our board to enable the library's leadership to make continuing education a priority. With their backing, the following policies were put into place at our library (the full policies are available at <http://www.pennyalbert.com>):

- Self-Directed Learning Policy (This policy provides one hour of paid educational time each week for all employees.)
- Teleworking Policy
- Required CEUs Policy (We increased requirements for library staff beyond state requirements.)
- "Learn Or Leave" Policy (All staff members are required to successfully complete an annual competency exam.)
- New Employee Training Program (Training happens over six months.)

Competencies can be included in strategic planning as part of a customer service or technology action plan. The first goal in our strategic plan is: *The library will provide excellent customer and technology service to the community.* This is the area where we make action plans for the development and expansion of our competencies, along with needed policy changes.

PRESENTING THE PROGRAM

Change is scary and intimidating, and if employees do not like a change, it can dampen morale and lead to dissatisfaction. Therefore, the way a competency program is presented will affect how employees perceive the change. In our case, we introduced items piecemeal to not overwhelm those who may have already felt left behind by technol-

ogy. While explaining the “Learn or Leave” policy and the importance of the skills to be learned, I have to admit there was an audible

access, but she doesn’t want to be left behind. What I explained to her was that library leaders and boards need to recognize the value of their

istered, a study guide is provided to staff members, and an anonymous form for questions allows the management team to

Who We Are

The Ephrata Public Library, like many others, has experienced growing pains and shrinking budgets. With 22 employees (13.8 FTEs), we have seen a dramatic increase in demand. Even with Ephrata’s small population of 30,000, circulation for 2013 was more than 650,000 items. We have an annual budget of around \$800,000, and we’re an independent library with our own board and mission. We began our competency program in 2011. All materials were prepared by members of the library’s management team, which includes the library’s executive director, assistant director, technology manager, and public services manager.

The Ephrata Public Library has carefully documented its competency program and training materials, which, along with access to its Competency LibGuide, are available to those wishing to bring competencies to other libraries. (If you have a LibGuide account you can copy all of our material in one step and then customize it to your needs.) To learn more, visit the following links:

- Ephrata Public Library: www.ephrapubliclibrary.org
- Ephrata Public Library Competency LibGuide: <http://ephrapubliclibrary.libguides.com/competencies>
- Penny Talbert’s Website (policy and competency downloads): www.pennytalbert.com

grumble. However, we also made it clear that employees were not expected to automatically know something. All requirements would be explained thoroughly with plenty of time for questions and learning. Rolling out a competency program will foster debate, and buy-in from all staff might not happen. But by making learning fun and easy, employees who may be fearful of technology realize that they can safely explore and gain confidence.

LEARNING METHODS

The majority of the content needed for learning a competency is already available online, and much of it is curated with original content mixed in. While there are many ways to present information, we’ve used LibGuides to facilitate our learning environment because it is customizable and allows users to share templates (see box). As with any group of people, however, learning styles vary. Therefore, learning materials need to be available in several formats to make it easier for all employees to grasp concepts. For instance, learning a competency could take place through a YouTube tutorial, a step-by-step PDF file, and a webinar. These options, coupled with collaboration through comments and forums, encourage employees to learn together and share their experiences even in lunchroom discussions. A competency program will not succeed if it does not give adequate support to all staff members. If an employee does not own a home computer or has no experience with an iPad, for example, you must be prepared to let them borrow one—and not just for one night. Recently, I received an email from a library clerk who attended a speech I gave about library competencies. She was concerned because her job is low paying and she cannot afford Internet

employees and make learning as easy as possible. Without commitment from all organizational members, a competency program cannot work.

TESTING

For many library administrators, testing is the most difficult part of a competency program. If you subscribe to the “Learn or Leave” philosophy, there is a chance you’re going to have to let someone go. To assure complete objectivity in the process, two managers should be present for each exam. If your staff, like ours, is small, having the same two people conduct all exams is ideal. We also videotape exams, which we can use should an employee disagree with the outcome. Employees can select to opt-out of the filming.

Our competency exams consist of two parts. The first part, the demonstrative test, evaluates an employee’s ability to complete technology skills. One manager reads the instructions and the other records the results, along with any notes. These exams are graded as pass or fail.

The second part of the exam, the written test, is an online exam that evaluates an employee’s knowledge of library policy, operations, services, and programs. After the exam is submitted, two managers grade the exam separately and then meet to discuss any discrepancies. Exams are graded numerically, with 100 being the highest score. The combined score from the two managers must be 85 percent or higher to pass. It is incredibly important that employees never have grounds to question test results because of how the tests were administered and evaluated. Before our annual exams are admin-

respond at staff meetings. One-on-one training time with the management team is also available, and employees are encouraged to take home devices the library now circulates, including laptops, iPads, and Roku Streaming Players, so they can practice using them and hooking them up. In short, if an employee does not pass the exam, they are not taking their job seriously.



At a recent inservice, library employees prepare themselves for trust falls.

This reality is essentially the reason for the “Learn or Leave” policy. Do you really want an employee in your library that refuses to learn?

EXPECTED AND UNEXPECTED RESULTS

Competencies give management a leg up on establishing a culture of teamwork. As a direct result of staff collaboration at our library, morale has increased and managers have made

teambuilding and fun a priority, from a staff kickball game to a bowling night to a midnight opening of *The Hunger Games*. We've even hosted a ceremonial bonfire burning of summer reading forms. Staff members are suddenly full of creativity and exhibit impressive problem solving skills. The most surprising result was the increase in donations over the past two years. Patrons needing assistance—and getting it at no charge by a knowledgeable library worker—have yielded unexpected donations. One woman, after attending a computer class, handed the trainer a check for \$1,000. This appreciation from the public motivates staff members even more as they show confidence in their technology skills. At last, continuing technology education really means something to them.

A STRATEGIC OBJECTIVE

Embarking on a competency program is for the good of your library. It can be a lot of work, but it can also be a rewarding experience that positions your library as a valuable community resource to a larger group of patrons. After the third year of our program, I can assert that adopting a competency program is one of the most important customer service initiatives we've undertaken. When the program starts to become part of the library's culture, it not only gets easier but also creates opportunities for meaningful teamwork. Selling a competency program to library leadership may not be pleasant initially, and implementing it may be difficult. Some in management will be sure to point this out. But the organization needs to consider the affect the program will have on services to the public.

All types of libraries are adopting competency programs because they perceive the outcome as fulfilling a strategic objective: improving the overall quality of library services. ▢

ABOUT THE AUTHOR: Penny Talbert is the Executive Director of the Ephrata Public Library in Lancaster County, Pennsylvania. An advocate for excellent libraries, Talbert's young adult programs at the library earned the *MVP of the Year* award from *VOYA Magazine*. She can be reached at ptalbert@ephratapubliclibrary.org or by calling 717/738-9291 ext. 100.

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