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Three Tips for Creating Local Technical Services Trainings

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One challenge that many Technical Services supervisors face is providing little or no-cost training opportunities for their staff. With limited professional development budgets and constant change in Technical Services workflows, it can be difficult for libraries, particularly public and school libraries, to keep up with staff education needs. The purpose of this article is to address common issues encountered in creating little or no-cost local trainings on a variety of topics, ranging from concrete tasks to complex theory. By the end of this article, readers should be able to navigate common issues faced in creating and implementing locally created/adapted staff instruction. Readers who are interested in free professional development resources should utilize email lists and professional organization resources.

I am a senior librarian in the Technical Services division of the Tigard Public Library whose primary responsibility is cataloging. Over the past four years, I have worked with colleagues at the Washington County Cooperative Library Services (WCCLS) Automation office and with staff at other WCCLS member libraries in order to provide countywide professional development opportunities for Technical Services staff responsible for cataloging and serials management. These trainings have included in-person instruction with customized guides, gamified self-guided exercises, and basic introductions to complex post-MARC concepts. Each of these professional development opportunities came with unique challenges and led to some lessons that I would like to share, including (I) keeping trainings simple and focused, (II) assigning local experts if one does not already exist and (III) relating complex terms to existing practices.

I. Keep instruction simple and practical

The most important lesson that I learned while creating local professional development resources is that it is critical to keep instruction simple, focusing on practical knowledge. Keeping the scope of training simple will help both the instructor and the trainees. In Guila Muir's *Instructional Design that Soars* (2013, pp. 21–24), Muir states that having a clear purpose in instructional design both helps the instructor to stay focused and provides the structure for the entire training. Muir's instructional design method promotes identifying roughly three clear learning outcomes that will be stated during the instruction, i.e., “the purpose of this training on using the Serials module is to help you create SHRs, build prediction patterns and check new issues in using the built-in ILS tool.”



One problem that I regularly face while attempting to articulate a clear purpose for instruction is identifying what other staff members actually need to know in order to perform their assigned duties. In her book, Muir states that instructors must first identify the actual problem before proceeding with identifying the purpose of training. Once you identify the actual problem, what trainees actually need to learn, building your purpose statement will be much easier. Don't focus on high-level knowledge or complex concepts in instruction on practical skills. Instead, focus on tasks trainees will need to be able to complete in their daily work. If you can state three specific tasks that participants will be able to complete by the end of the training, developing the training will be more manageable. This may seem easier than it is in reality, but if you keep a clear purpose statement in mind while creating professional development resources, that clear purpose will translate to the trainee.

Part of this first lesson in creating local professional development opportunities is that you may need to provide multiple trainings on larger topics. Attempting to include more than three learning outcomes in one instruction session will backfire. By limiting trainings to three or fewer learning outcomes, you will allow participants a chance to absorb the lessons. Trying to include a large amount of information in one training session will create a stressful environment for both the instructor and the participants, who will most likely not be able to absorb any of the learning outcomes. This is not to say that you cannot provide multiple instruction sessions in one day, but that, for the purpose of keeping learning outcomes manageable, you should treat each set of learning outcomes as a separate training.

II. Assign a local expert

The person who will be responsible for identifying clear and manageable learning outcomes is your assigned local expert. Assigning one local expert who will use a high-level of knowledge to train staff at a variety of levels can work. Not all staff need to understand *why* tasks must be completed in a certain way. You just need one person who can make educated decisions about workflows. This local expert can create trainings that are meaningful to your local staff, can act as a local go-to person for troubleshooting, and continue to fine-tune local resources as problems arise.

Like the first lesson, assigning a local expert is often easier said than done. Local experts will need dedicated time in order to complete their assignment—time away from the interruptions inherent in public service desk work. They will also need clear guidance and support from a supervisor, peer, or mentor. Guidance and support may come in the form of direction on which resources to use (ILS help sections, email lists, working one-on-one with a regional expert) but also in the implementation of instruction. Without dedicated time, guidance and support, your local professional development opportunities may not be successful.

The suggestion of assigning a local expert assumes the existence of staff expertise and availability—a luxury not afforded to all libraries. For smaller libraries, this local expert may be a library director/manager or a paraprofessional who is responsible for technical services work. If you are the local expert for your library and do not have the support or resources of a medium to large library (or a local cooperative), reach out to your peers through local and national professional organizations and email lists. You might be able to repurpose training materials created by other libraries or receive guidance on how to make local decisions.



III. Relate complex terms to existing practices

Utilizing an assigned local expert in order to prepare and implement local training should help with most staff education needs but, unfortunately, not all local professional development demands will relate to practical skills. This leads to the third lesson I have encountered in developing local professional development opportunities—how to approach the introduction of complex concepts. When you identify local educational opportunities related to complex concepts, i.e., introducing staff to projects like BIBFRAME, you will need to find a means of making these abstract concepts approachable. This can be achieved by relating jargon to concepts that trainees already encounter in their daily work.

When working with complex terms, remember to keep it simple. Ask yourself what the trainees already encounter in their daily work that could help them relate to new terminology. What practical skills relate to the concept? How does this concept relate to trainees' daily lives? Is there a way that trainees could view the work that they already do through a different perspective? Below is an example of how to make an abstract concept more approachable.

One of the local educational tools that I worked on for WCCLS catalogers was a series of blog entries intended to introduce linked data concepts. This four-part series introduced three general concepts related to linked data (concepts discussed in BIBFRAME updates from the Library of Congress) with three posts introducing one new concept in each post, tying them all together in the final post (Milbrodt, 2018). One of these concepts I introduced was identifiers. Rather than focusing on how identifiers will be used in a post-MARC environment, I focused on how we already use identifiers in the form of barcodes, item record control numbers, and bibliographic record control numbers. By scaling the concept of an identifier back to a basic level, readers are able to recognize that they already use this component of linked data, making the concept more approachable and allowing participants an opportunity for reflection.

In conclusion, developing little or no-cost staff trainings is often easier said than done. Developing and implementing meaningful staff education opportunities can be stressful for both the trainer and the trainees, but it is possible. Providing or seeking support for a local expert and focusing on keeping instruction relevant to the work that staff complete on a daily basis can ease the stress of providing local professional development opportunities for everyone involved. Remember to keep learning outcomes simple and focused in order to set clear expectations for trainers and trainees. When in doubt, reach out to the larger library community for guidance and existing resources. 

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