Practical Tips for Training, Development, and Evaluation within Technical Services

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Agenda

- Assessment
- Service evaluation
- Training assessment
- Training design
- Training plans


Assessment

Assessing Library Services:

- Establishing clear, measurable expected outcomes
- Ensuring sufficient opportunities, materials, and training to achieve those outcomes
- Systematically gathering, analyzing, and interpreting evidence
- Using the resulting information to improve

An Example: ILL

Scenario: ILL keeps a list of resources which have been requested but the library actually owns. A trend has been noticed that this is occurring more frequently with certain e-books.

Is training necessary?

Motivation

Environment

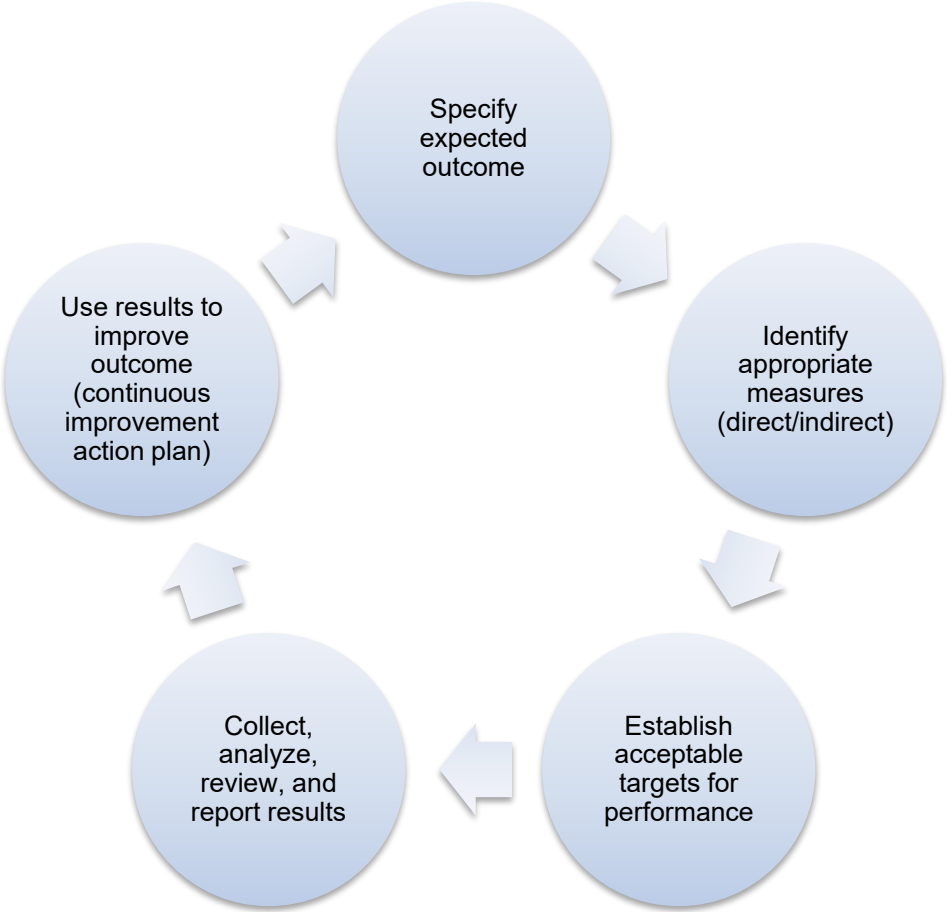
Knowledge

Skills

Was Training Successful?

- Learning Outcomes vs Assessment Outcomes
- Numbers Aren’t Everything
- Direct vs Indirect Measures
- Skills Inventory

Continuous Improvement




Training design

How adults learn

Learning must be relevant

Learning must tap into prior knowledge

Learning must be timely

Learning must be experiential

Learning outcomes are SMART

SPECIFIC

MEASURABLE

ATTAINABLE

RELEVANT

TIME-BOUND

Not SMART!

- The learner will understand cataloging

~~KNOW~~

~~UNDERSTAND~~

What does success look like?

- ~~The learner will understand cataloging~~
- How will I know that the learner understands cataloging?

What, specifically, does success look like?

- ~~The learner will understand cataloging~~
- How will I know that the learner understands cataloging?

Can match an item to an OCLC record using matching guidelines

Using RDA, can transcribe an item title with correct capitalization and punctuation

Can add Cutter number using Cutter table and shelflist

Using LCGFT, can apply genre terms for feature film DVDs

Build a SMART learning outcome

- ~~The learner will understand cataloging~~
- At the end of the training, the cataloger will use matching record documentation to select and export OCLC records

Bloom's verbs

Remember	Understand	Apply	Analyze	Evaluate	Create
Arrange	Classify	Calculate	Combine	Appraise	Arrange
Define	Describe	Construct	Figure	Argue	Assemble
Locate	Identify	Demonstrate	Find	Assess	Compose
Recall	Indicate	Estimate	Sketch	Defend	Design
Recite	Organize	Illustrate	Solve	Estimate	Devise
Describe	Interpret	Interpret	Predict	Judge	Formulate
Repeat	Illustrate	Appraise	Change	Predict	Invent
Identify	Reorganize	Contrast	Survey	Qualify	Manage
Select	Translate	Criticize	Compare	Rate	Modify
Quote	Paraphrase	Diagnose	Diagram	Support	Organize
Label	Summarize	Identify	Examine	Critique	Plan
Copy	Transform	Classify	Test	Recommend	Prepare
List	Discuss		Modify		Produce
Name	Explain				Propose
State	Defend				Set Up
	Compare				Verify
	Report				Construct
	Restate				Develop
	Review				
	Rewrite				

Standard work

- Use behaviors and conditions from your work instructions
- Tie training to standard work
- Backward design

5.0 Procedure:

Procedure: Accessioning Archival Collections	
Start of process	
Step 1	Receive collection needing to be accessioned and accession request from Head of Archives. https://gtvault.sharepoint.com/sites/LLE/dept/archivesrecmgmt/_layouts/15/WopiFrame.aspx?sourcedoc=%7BFCBC14A8-9A76-4D60-A7CD-C9DA92BDF391%7D&file=LRC.INFRAS.ARC.W0019.docx&action=default
Step 2	Review collection and apply preservation practices https://gtvault.sharepoint.com/sites/LLE/dept/archivesrecmgmt/_layouts/15/WopiFrame.aspx?sourcedoc=%7BF89DEAF4-470D-441C-9DCF-CB830D368A02%7D&file=LRC.INFRA.ARC.W0020.docx&action=default
Step 3	Create Inventory https://gtvault.sharepoint.com/sites/LLE/dept/archivesrecmgmt/_layouts/15/WopiFrame.aspx?sourcedoc=%7B3FE46ACC-80CA-44F9-8018-CCAB15FA8075%7D&file=LRC.INFRA.ARC.W0021.docx&action=default
Step 4	Instructions for creating Accession record in ASpace https://gtvault.sharepoint.com/sites/LLE/dept/archivesrecmgmt/_layouts/15/WopiFrame.aspx?sourcedoc=%7BEDBFBF8F-53AA-4595-A152-73346A0673D4%7D&file=LRC.INFRA.ARC.W0022.docx&action=default
Step 5	Prep collection for transport to LSC https://gtvault.sharepoint.com/sites/LLE/dept/archivesrecmgmt/_layouts/15/WopiFrame.aspx?sourcedoc=%7BF5D87F7C-1C5D-4D4D-9B35-A0A6FC3E67F8%7D&file=LRC.INFRA.ARC.W0023.docx&action=default
Step 6	Notify LSC Operations Manager and Head of Archives https://gtvault.sharepoint.com/sites/LLE/dept/archivesrecmgmt/_layouts/15/WopiFrame.aspx?sourcedoc=%7B59ABC42F-1C42-49D1-8FE6-4569FC4C1463%7D&file=LRC.INFRA.ARC.W0024.docx&action=default
End of process	

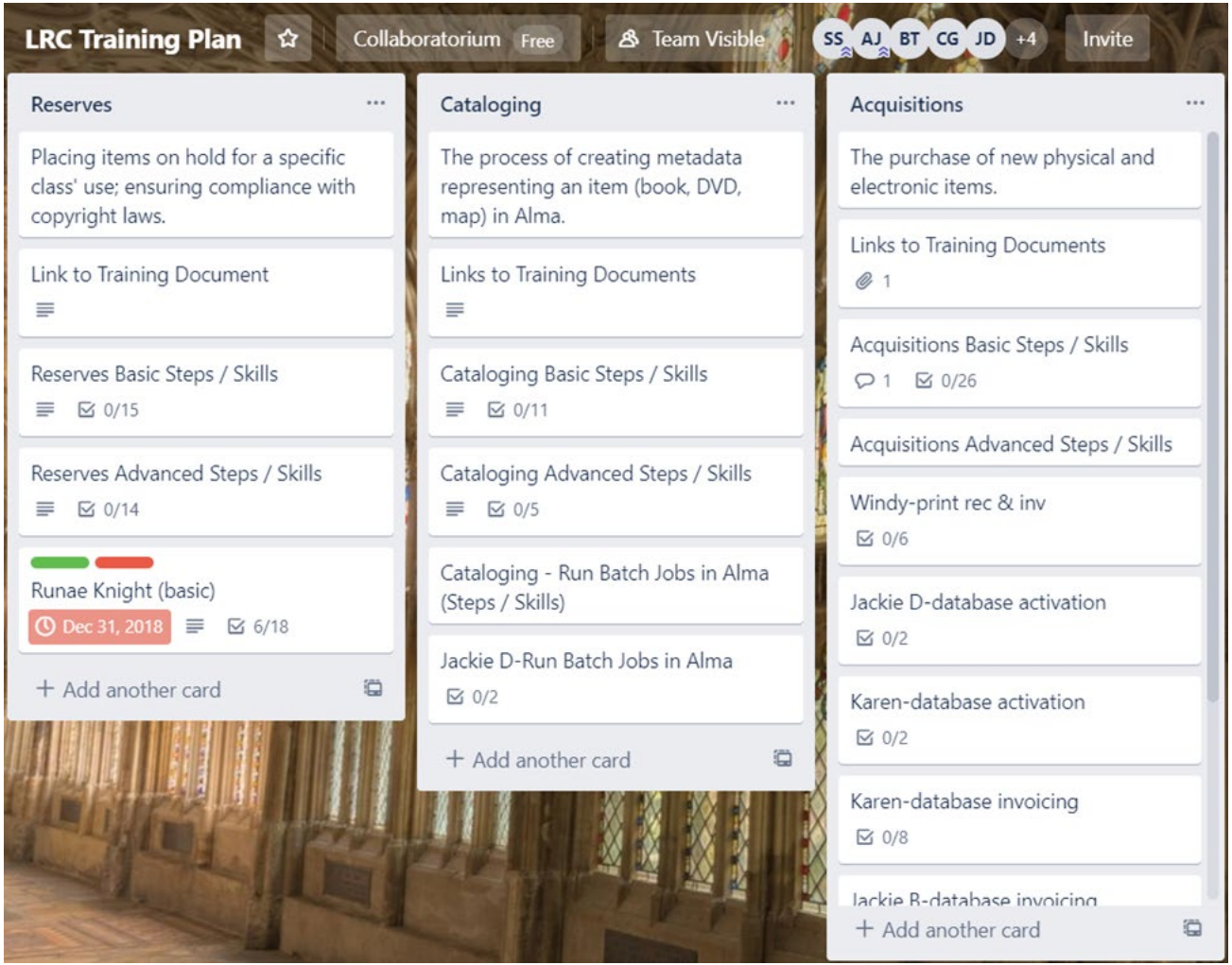
Training plan and timetable (overall)

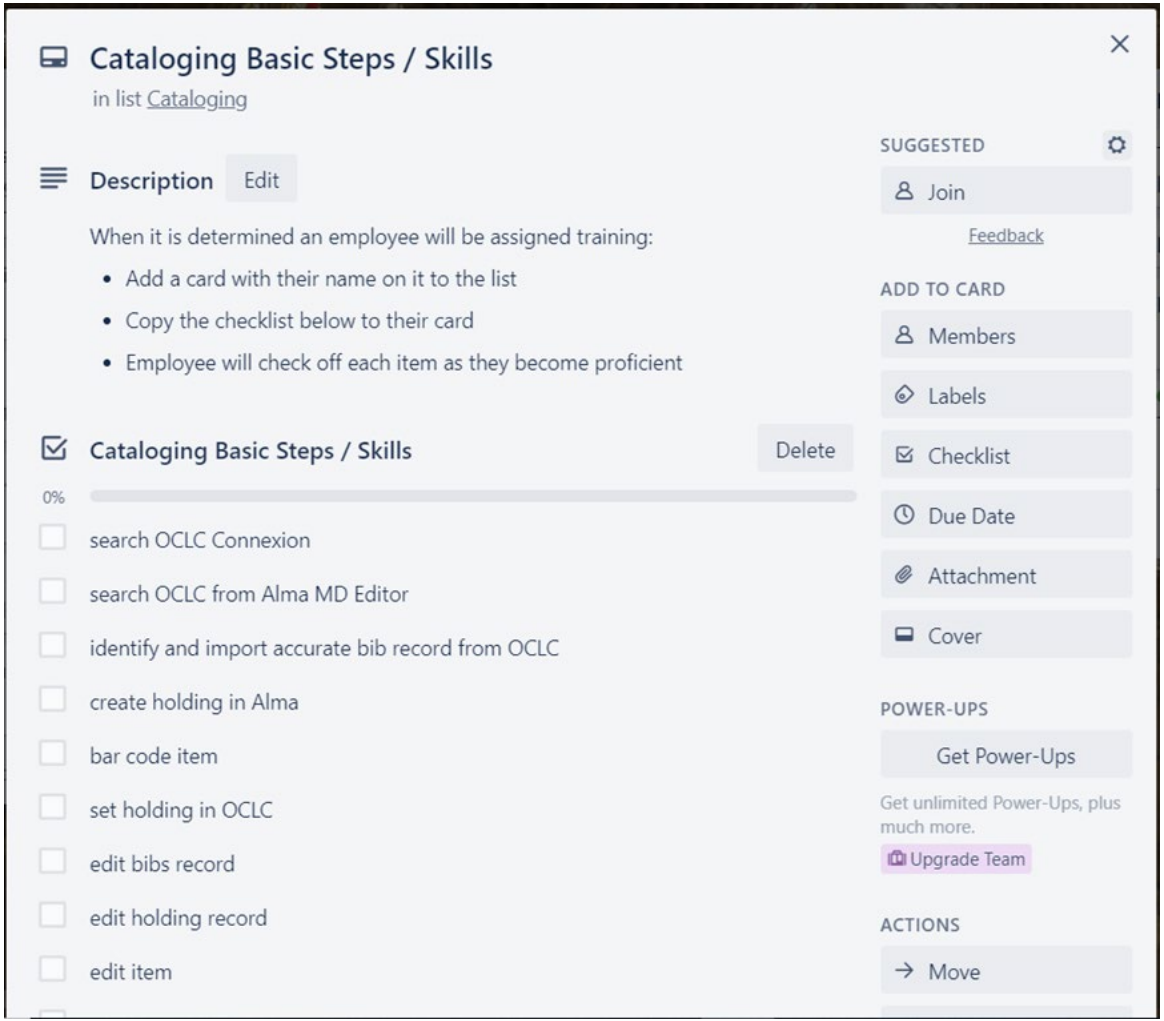
	Person A	Person B	Person C	Changes in Production
Cataloging	✓	★		
Acquisitions	✓		✓	
E-resources			✓	
Repository	✓	✓		
Digitization	★	02/01	02/01	Need 2 more people in March
Physical processing		✓		
Turn Over Work performance		Needs more training in E-resources		

Training plan and timetable (Specific area: Cataloging)

Levels legend:
● - can train others
○ - can perform work
□ - needs training

	Monograph copy cataloging	**Serials copy cataloging**	**DVD/media cataloging**	**LHR maintenance**	**Authority work**
Person A	●	○			□
Person B	○	□			
Person C	●	●			●
Person D	○			○	


LRC Training Plan
Collaboratorium Free
Team Visible
SS AJ BT CG JD +4
Invite
Reserves
Placing items on hold for a specific class' use; ensuring compliance with copyright laws.
Link to Training Document
Reserves Basic Steps / Skills
0/15
Reserves Advanced Steps / Skills
0/14
Runae Knight (basic)
Dec 31, 2018
6/18
Add another card
Cataloging
The process of creating metadata representing an item (book, DVD, map) in Alma.
Links to Training Documents
Cataloging Basic Steps / Skills
0/11
Cataloging Advanced Steps / Skills
0/5
Cataloging - Run Batch Jobs in Alma (Steps / Skills)
Jackie D-Run Batch Jobs in Alma
0/2
Add another card
Acquisitions
The purchase of new physical and electronic items.
Links to Training Documents
1
Acquisitions Basic Steps / Skills
1
0/26
Acquisitions Advanced Steps / Skills
Windy-print rec & inv
0/6
Jackie D-database activation
0/2
Karen-database activation
0/2
Karen-database invoicing
0/8
Add another card


Cataloging Basic Steps / Skills
in list Cataloging
Description
Edit
When it is determined an employee will be assigned training:
Add a card with their name on it to the list
Copy the checklist below to their card
Employee will check off each item as they become proficient
Cataloging Basic Steps / Skills
Delete
0%
search OCLC Connexion
search OCLC from Alma MD Editor
identify and import accurate bib record from OCLC
create holding in Alma
bar code item
set holding in OCLC
edit bibs record
edit holding record
edit item
SUGGESTED
Join
Feedback
ADD TO CARD
Members
Labels
Checklist
Due Date
Attachment
Cover
POWER-UPS
Get Power-Ups
Get unlimited Power-Ups, plus much more.
Upgrade Team
ACTIONS
Move

Thank you!

Matt Frizzell

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