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***INTERNATIONAL FEDERATION
OF LIBRARY ASSOCIATIONS
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**DIVISION OF EDUCATION
AND RESEARCH**

**SECTION ON CONTINUING PROFESSIONAL
DEVELOPMENT WORKPLACE LEARNING**

CPDWL

Newsletter

April, 2003

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THE CPDWL EXECUTIVE COMMITTEE 2003-2004

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Bruce Massis	Associate Director Southeast Florida Library Information Network (SEFLIN) 100 S. Andrews Avenue, Fort Lauderdale, Florida 33301, USA	2002-05	Chair, Open Session Program committee for Berlin 2003

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The Newsletter is published twice a year in October and April. Please share your ideas and experiences by sending your contributions or suggestions to John F. Harvey, PO Box 21363, 1507 Nicosia, Cyprus, Tel: (357-22) 664286, Fax: (357-22) 676061, e-mail: john.f.harvey@usa.net or Suite 1105, PMB-079, 82 Wall Street, New York, NY 10005-3682, USA, Fax: 212-968-7962. Secretariat: Janet Assadourian.

LETTER FROM THE CHAIR.....

The development of online, web-based services is central to the future of libraries. Our users are demanding them – they want services accessible from their desk-tops and palms, in their offices, workplaces and homes; our competitors¹ are delivering them – visit amazon.com and commercial document delivery services; our suppliers require that we carry out business and other types of transactions online (for example, online ordering and serials claims). Our technology must be integrated so our patrons are unaware of where one system stops and the next begins (or at least the number of ‘clicks’ and passwords are minimised). For example, library networks share online catalogues, and libraries can now provide seamless access to full text articles (from subscribed journals) following a search in a bibliographic database.

Technology itself is the enabler; environmental factors (including information and communication technology - ICT) influence our direction and push our progress, and press us to reassess our values. In challenging times, however, it is our continuing commitment to underlying values of libraries, our service ethic and our belief in the value of information, ideas and works of imagination and freedom of expression in people’s lives, that sustain us. The ILFA Core values are based on the principle of freedom of access and endorse the need for equitable access to information.

It is implicit in this value system that we use technology as an enabler and not as a ‘disabler’ – that we work actively to overcome the digital divide, not to reinforce the barriers which have the potential to separate the technological ‘haves’ from the ‘have nots’.

One of the methods of improving the information literacy skills of our users is through the provision of training courses. Library professionals also keep their knowledge and skills up-to-date through their own training and continuing professional development activities. Increasingly these activities are being delivered through online, web-based courses. And increasingly our skills in creating and delivering online courses are in demand – both for our own staff development, and for developing the information literacy skills of our clients. This is a critical component of increasing equity of access and facilitating the ability of our clients to participate in everyday transactions using online, web-based services.

The IFLA conference theme in Berlin in August this year is *Access Point Library: Media – Information – Culture*. The CPDWL Section's Open Session and Workshop focus on the theme of online course delivery. (For more information about these programs see later sections of this newsletter.) If you are interested in the future of online course delivery and how to improve your skills in this area, we encourage you to attend these sessions.

Ann Ritchie -- Chair CPDWL

ⁱ Competitors' are defined in marketing terms and the concept applies to any organisation which can provide the same or substitute service

Continuing Professional Development & Workplace Learning (CPDWL) Section of IFLA

Proposal for the development of IFLA approved guidelines for a quality improvement framework for continuing professional development and workplace learning.

Summary

The Continuing Professional Development & Workplace Learning Section of IFLA has as one of 12 strategic objectives/actions the development of IFLA approved guidelines for the provision of CPD programmes within a quality improvement framework.

This proposal seeks funding to support a project aimed at achieving this objective.

Background

The IFLA Continuing Professional Development and Workplace Learning Section works:

1. to encourage and develop continuing professional development programmes for information and library personnel, reflecting current developments for the profession, and
2. to provide a focal point for relevant activities.

In furtherance of these aims the Section has identified four strategic goals and twelve objectives within those goals. Goal #2 is concerned with improving the opportunities of librarians worldwide to contribute to lifelong learning both within and outside the profession. To achieve that aim the Section. To achieve that aim the Section has set itself the objective of developing a quality improvement framework for continuing professional development.

This objective was the focus of discussion at the IFLA Continuing Professional Education Round Table pre-conference in Aberdeen (August 2002). In particular, that discussion focussed on the role of the Section in promoting quality in continuing professional development & workplace learning. In those discussions it was noted, inter alia, that "quality" has different meanings in different contexts, different cultures, different countries and for different groups. This presents challenges in developing a set of "quality" guidelines or standards which will be relevant and useful for library and information professionals in all IFLA member countries.

However, it is a challenge worthy of attention, one well suited to carriage by an international group and one which holds much potential for benefit.

Objectives of this project

Broadly this project will be concerned with: a) further exploring the issue of the meaning and definition of “quality” in the context of continuing professional development & workplace learning programs and b); developing a set of approved guidelines for the measurement and assessment of quality in the CPDWPL context. It is envisaged that these guidelines will cover:

- Context, the quality guidelines need to address variations in terms of the needs of ,professional practitioners in a range of countries and cultures
- Impact/Outcomes Assessment Techniques – how success is measured
- Content, ...
- Delivery, ...
- Format and instructional strategies ...

(These elements need to be spelt out more fully. Suggestions requested/welcomed. Ian.)

The guidelines will be widely disseminated in accessible format/s. Emphasis is to be on a set of flexible guidelines that can be applied in different contexts rather than firm standards - a set of guidelines that can be usefully applied in different contexts and countries and by/for different groups.

It will be important that the guidelines are kept current and relevant by regular review and revision as and when needed.

Proposed Actions

Stage One

Actions:

- 1.1 Literature review and summary of findings
- 1.2 World wide survey of extant quality measurement, quality assurance, guidelines and standards
- 1.3 Informed by 1.1. and 1.2, review and refinement if necessary of the project

Stage Two

- 2.1 Informed by the outcomes of the stage one – development of a set of draft quality guidelines for CPDWPL
- 2.2 Review discussion and refinement of the draft Guidelines – within the Section and at more widely as appropriate (see Reporting below)

Stage Three

- 3.1 Testing and evaluation of the draft guidelines

Stage Four

- 4.1 Modification based on Stage III outcomes
- 4.5 Promulgation and application of the Guidelines

Stage Five

Ongoing review and modification of the guidelines

Schedule/Timetable

Stage One

- 1.1 Commence January/February 2003. Complete April 2003
- 1.2 Commence February/March 2003. Complete June 2003
- 1.3 June 2003?

Stage Two

- 2.1 Commence May 2003. Complete July/August 2003
- 2.2 Commence August 2003. Complete December 2003

Stage Three

3.1 Commence January/February 2004. Complete June 2004

Stage Four

4.1 July 2004

4.5 August 2004

Stage Five

Annual – August each year.

Responsibility

The Committee of the CPDWPL Section will take overall responsibility this project. Within the Committee a small sub-group (Ian Smith, La Trobe University, Australia & Lesley Mayo Pennsylvania State University Libraries, U.S.A. working in conjunction with Ann Ritchie, Chair CPDWPL Section) will have major carriage of this project.

Reporting

There are several possible reporting/communication avenues.

1. Section Newsletter/Discussion List

The Section Newsletter and the CPDWPL discussion list (on IFLA net) will provide the main vehicle for ongoing dissemination of reports on progress with this initiative. It is expected that this will be a two way communication process with members of the Section and other readers of the Newsletter and participants in the discussion list commenting on draft and otherwise having input to the development of the Guidelines. Other mechanisms such as national professional conferences, discussion lists etc will be used as vehicles to publicise the work underway in developing these guidelines. These avenues are expected to provide useful input into the development of the Guidelines.

2. IFLA Conference – Berlin, August 2003

At the August 2002 conference the Section will be conducting both a workshop session and an Open Forum – the themes being the development and delivery of online training and continuing professional development. Evaluation and quality assurance will be one of the threads running through discussion on both of these programs. The stage two guidelines should be ready in draft prior to August 2003 and so could be made available for discussion and comment at the Berlin conference workshop & forum.

Ian Smith. 16/12/2002

NEWS.....

IFLA Express No. 1 now available! -- The IFLA 2003 Berlin Organising Committee is very pleased to announce the first issue of IFLA Express for the IFLA 2003 Conference in Berlin, Germany. The English and German versions can be downloaded as PDF-files from the conference web site at:

<http://www.ifla.org/IV/ifla69/express-e.htm> (English)

<http://www.ifla.org/IV/ifla69/express-g.htm> (German)

This first issue contains (among others) the following information:

- Programme in Brief
- Visa and Letter of Invitation
- New Conference Fee Structure
- International Trade Exhibition
- Information on Berlin and Germany
- Important Deadlines

The second issue of the IFLA Express will be published in May/June 2003, and another five issues will appear each morning during the conference.

Members of IFLA will receive the printed version by regular mail.

Open Session for the IFLA Section on Professional Development and Workplace Learning at the World Library and Information Congress: 69th IFLA General Conference and Council Berlin, Germany, August 1-9, 2003

Day and Time - To Be Determined

Theme of Open Session - "Stakeholders for Continuing Professional Development (CPD): a look at the future of online delivery"

Papers to be presented include:

1- CPD stakeholders in Latvia: have ten years of independence made a difference?

By Dr. Iveta Gudakovska and Inese A. Smith

2- Providing effective continuing professional development to United Kingdom academic librarians in the further education sector: outcomes from a national survey by the Chartered Institute of Library and Information Professionals (CILIP)

By Kathy Ennis and Dr Graham Walton

3- An Evaluation of the New Opportunities Fund ICT Training Programme for Public Library Staff, UK

By Rachel E. Spacey

4- CPD at a Distance: a future trend in LIS education?

By Dr Judith Broady-Preston and Hugh Preston

Each paper will consist of a 20-minute presentation with 10 minutes allotted for questions and answers. Speakers have been formally invited to present and have all been asked to draw some conclusions about the future directions of online delivery of training.

"Is digital different? New trends and challenges in acquisition and collection development" -- Munich, 30-31 July 2003 sponsored by IFLA Acquisition & Collection Development Section and Bavarian State Library.

This two-day preconference, held in Munich, the capital city of Bavaria, focuses on the question of how principles of acquisition and collection development change in the digital age. It addresses an international audience, in particular librarians actively engaged or interested in hybrid library issues, information industry professionals as well as academics as producers and users of scholarly information. International experts, representing different segments of the information chain, will examine the validity of traditional selection criteria in the digital world. Case studies will give first-hand information on how the hybrid collection can be organised in terms of creating user-oriented access points as well as the internal restructuring of work-flow processes.

Papers and panel discussions will explore current trends in acquisition policy for the hybrid library, such as the value of consortia building and the importance of constant evaluation, in particular against the background of emerging changes in the publishing world.

Further information, including programme and instructions for registration: http://www.bsb-muenchen.de/ifla/ifla_pre.htm

**World Library and Information Congress: 69th IFLA General Conference and Council
"Access Point Library: Media - Information - Culture" 1-9 August 2003, Berlin, Germany**

Only 24 days to go for early birds!

If you want to catch the early bird rate for the world's greatest gathering of librarians in Berlin this August, you need to register by 1 May 2003!

The conference website gives you full details on the conference as well as travel and tourist information at: <http://www.ifla.org/IV/ifla69/index.htm>

Please go ahead and register now!

Registration forms and online registration at: <http://www.ifla.org/IV/ifla69/req-e.htm>

For further information please contact:

IFLA 2003 Berlin Secretariat

Barbara Schleihagen, Secretary General

Christoph Albers, Conference Co-ordinator

Irini Courzakis, Project Manager

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HARRY CAMPBELL CONFERENCE ATTENDANCE GRANT YEAR 2003

IFLA ALP is pleased to announce the availability of the Harry Campbell Conference Attendance Grant, to support a delegate from a developing country which has not had IFLA Conference participants in the last few years, to attend the 69th IFLA Conference in Berlin, Germany, 1-9 August 2003. The grant will cover the ticket. The cost of registration fee, accommodation and meals will be met by the delegate.

Criteria for allocation:

- Candidates must be a national of one of the following countries; Belize, Bhutan, Cameroon, Cape Verde, Djibuti, Eritrea, Gabon, Guyana, Liberia, Madagascar, Mauretania, Sao Tomé , Sierra Leone, Solomon Islands, Somalia, Swaziland, Tonga and Yemen.
- General quality of application.
- Professional background and experience: level of education, positions held and professional experience in general. Type of library experience is also considered in order to get balance between all sectors of library and information work.
- Committed letter of application and a well presented CV.
- Priority will be given to younger professionals with a minimum of 5 years of experience in the field of libraries. If your institution can afford to sponsor you on the basis of this cost-sharing package, please apply by filling in the form given below. Only those delegates who are able to contribute their part of the cost should apply.

Applications, including professional curriculum vitae and information on present occupation should be submitted as soon as possible and should be received by the ALP Focal Point not later than 15th March, 2003.

IFLA ALP, c/o Uppsala University Library, Box 510, SE-751 20 UPPSALA, Sweden

Fax: +46 18 471 3994, e-mail: ifla.alp@ub.uu.se

See application from at: <http://www.ifla.org/III/grants/hccgrant.htm>

TRANSFER OF VOUCHER SCHEME TO IFLA HEADQUARTERS

With effect from 1 April 2003, the Voucher Scheme will move from its current home at the British Library to IFLA HQ in The Hague, Netherlands.

All contact details and payment and redemption instructions will change from this date. Please check IFLA's web site at <http://www.ifla.org/VI/2/uap.htm#1a> for the latest information. Your new contact at IFLA HQ will be Susan Schaeppman, susan.schaeppman@ifla.org

If you have recently sent a payment to the IFLA Voucher Scheme at Boston Spa, your order will be processed as usual. Please do not send new orders to Boston Spa, but consult the web site for IFLA HQ contact and payment details.

If you have recently sent vouchers to Boston Spa for redemption, please let us know at ifla@bl.uk. Your vouchers will be processed at Boston Spa, but your payment will be issued by IFLA HQ by bank transfer in Euros. Please do not send new redemptions to Boston Spa, but consult the web site for new instructions.

From 1 April 2003, the sale and redemption of IFLA vouchers from IFLA HQ will change from Dollar transactions to Euros. The value of existing vouchers will change from US\$8 and US\$4 to become EUR8 and EUR4. All vouchers in circulation will remain valid and you should continue to use them in the usual way.

We have been delighted at the success of the IFLA Voucher Scheme during its first eight years. The transfer to IFLA HQ offers the opportunity to introduce some changes which many colleagues have been demanding for a long time. There may be a short delay in the processing of Voucher Scheme requests during April, and we would ask you to be patient with us while we make the transfer.

On a more personal note, both Katharine Rennie and I would like to say thank you for all the friendly and encouraging communication we have with our Voucher Scheme colleagues in

recent years. The Scheme is passing into the best possible hands, and we are sure you will continue to enjoy an excellent service from our IFLA HQ colleagues.

Sara Gould - IFLA Voucher Scheme

CPDWL Workshop at the Berlin Conference

One of the Section's major contributions to the IFLA conference in Berlin will be a half day workshop focusing on the development, presentation, evaluation and assessment of the quality of online continuing professional education courses and training programs.

The Section has been fortunate to secure a magnificent venue for the workshop: the Saur Library at the Humboldt University in Berlin.

There will be 5 main presenters at the workshop. Those presenting will: a) provide brief demonstrations of their online or CD based distance education, CPD and training programs and b) speak to their presentation covering the factors leading to the development of their program and salient issues that arose in the development and delivery of their CPD/training resources. Participants will, during the workshop, have access to at least some of the online course materials demonstrated and will have time for self directed exploration of these programs and informal discussion of the programs with other participants.

The workshop will conclude with a group discussion/question and answer session with a panel of the presenters/course developers. The focus of this session will be on developing practical evaluation criteria for online/CD based continuing professional education and training programs.

Attendance at this hands-on workshop will be strictly limited with forty-five places available to IFLA Conference delegates. Pre-registration is encouraged. Further details regarding the Workshop and a call for registrations will be made on the Section's web page <http://www.ifla.org/VII/s43/scpdwl.htm> and via the CPDWL discussion list.

The joint coordinators for the workshop welcome comments and enquiries. Contact either: Ian Smith, La Trobe University Library, Australia, i.smith@latrobe.edu.au or Diann Rusch-Feja, International University, Bremen d.ruschfeja@iu-bremen.de

Development of IFLA approved guidelines for a quality improvement framework for continuing professional development and workplace learning.

The Continuing Professional Development & Workplace Learning Section of IFLA has as one of 12 strategic objectives/actions the development of IFLA approved guidelines for the provision of CPD programmes within a quality improvement framework. The Section currently has underway a project aimed at achieving this objective.

The project is concerned with: a) further exploring the issue of the meaning and definition of "quality" in the context of continuing professional development & workplace learning programs and b); developing a set of approved guidelines for the measurement and assessment of quality in the CPDWPL context. The guidelines will be widely disseminated in accessible format/s. Emphasis is to be on a set of flexible guidelines that can be applied in different contexts rather than firm standards - a set of guidelines that can be usefully applied in different contexts and countries and by/for different groups. The guidelines are to be kept current and relevant by regular review and revision as and when needed.

Stage one of the project, a literature review and summary of findings followed by a world wide survey of extant quality measurement, quality assurance, guidelines and standards is currently underway.

Stage two will involve the development of a set of draft quality guidelines for CPDWPL and wider Review discussion and refinement of these draft Guidelines. That discussion will take place both within the Section and a more widely as appropriate.

Stage three will entail testing and evaluation of the draft guidelines followed. Stage four will entail modifications based on the outcomes of the previous stage then promulgation and application of the Guidelines. The final stage of the project will be one of ongoing review and modification of the Guidelines.

It is planned that stages one and two will be completed by December 2003, the remaining stages to be completed in 2004.

The workshop & open sessions to be conducted by the Section at the IFLA conference in Berlin, August 2003 will provide an important and timely avenue for input to the project. Specifically, the project co-ordinators hope to have a set of draft Guideline available for perusal and comment at the Conference.

Comment on, and input to, the project is welcomed by the Project Coordinators: Lesley Moyo and Ian Smith.

Lesley M. Moyo, Penn State University Libraries, U.S.A., E-mail: Imm26@psu.edu
Ian Smith, La Trobe University Library, Australia, E-mail: i.smith@latrobe.edu.au

CPDWL discussion list on IFLANET

The Section has recently established a discussion list. The objective of the list is to provide a discussion list for information professionals who are interested in issues to do with continuing professional development & workplace learning in the library and information professions. Membership of the List is open to anyone interested in these issues. The list is moderated so spam free. You can find the discussion list at: <http://infoserv.inist.fr/wwwsympa.fcgi/info/cpdwl>

Contributions can be posted to the list either via the web page or by emailing contributions to cpdwl@infoserv.inist.fr

The appearance of the List has generated a considerable (and pleasing) level of interest. Following publicity in mid March the List has had a surge in members 140+ subscribers in mid March with that number growing daily. In order to be a valuable resource we need regular contributions and vibrant discussion. Section members are invited and encouraged to join the List and to contribute to discussions.

We look forward to your contributions and participation in those discussions!
Ian Smith and Graham Walton -- List Moderators

Changes to the IFLA Journal

With effect from Vol. 29, no. 1 (March 2003), a number of changes have been made in the layout and organization of the IFLA Journal. The aim is to make the journal more attractive, easier to read and easier to use, while still maintaining continuity in its overall appearance.

The cover now carries an outline of the main contents, so that readers can see what is inside before they open it. In the interests of greater readability the layout of the Contents page has been modified, a double-column layout introduced for articles, and the type size and leading have been increased throughout.

The former three-column layout for the News section has been retained, but substantial reports are now to be found in a separate Reports section, set in double column. The News section now has its own separate table of contents, and the layout of the International Calendar has been modified to make it easier to use.

The changes are not confined to the printed version of the journal. Up to now, the PDF version on IFLANET has been presented in four parts: Table of Contents, Abstracts, Articles and News Section. The lack of links between and within these documents meant that it was impossible, for example, to identify an interesting item in the Table of Contents, or the Abstracts, and then go directly to the desired text.

To make the online PDF version easier and quicker to use, it now includes embedded bookmarks to enable readers to go directly to any article, report or news subsection in the issue. The contents are shown as bookmarks in the bookmark pane. To view an item, simply click on its title and the full text will appear.

Both the current and previous online versions of the IFLA Journal are available on IFLANET at <http://www.ifla.org/V/iflaj/index.htm>.

With effect from Vol. 29, no. 1, the IFLA Journal will be published four times a year, in March, June, October and December. The total number of pages in each volume will remain the same as before (320-360 pages) and the fourth issue in each volume will be an extra large issue containing a selection of the best papers from that year's IFLA Conference. The next issue for this year (Vol. 29, no. 2) will include, among other items, a survey of libraries in Germany by Claudia Lux, published as background to this year's Berlin Conference.

Stephen Parker, Editor

Subject: Review of IFLA Sections
To: Officers of all IFLA Sections
Date: 13 March 2003

Dear Colleague

The Professional Committee has decided that it would carry out a thorough review of IFLA Sections in 2007. It agreed to do this in the light of the recent increase in the number of Sections, arising from the decision to translate a number of former Discussion Groups into Sections, and the later decision to translate most of the former Round Tables into Sections. The context of the review is the successful introduction of the new Statutes and Rules of Procedure, together with the adoption of a set of Core Values and the Professional Priorities agreed by the Committee. These changes, combined with improvements to the annual conference, are helping to revitalise the Federation. The Committee wishes to maintain this momentum by inviting Standing Committees to review their objectives and the means available to achieve them. It believes that, by setting the date for the review at 2007, it is providing a good opportunity for both well-established Sections and the newer ones to conduct their own reviews within a realistic time frame.

Whilst the changes outlined above were desirable developments in themselves, bringing the welcome benefits of a simpler overall structure and more democratic involvement, it has prompted the following observations in a number of fora, including the President-elect's brainstorming session and the debate following the 'Green Light for IFLA' paper prepared by Marian Koren;

- Are there too many Sections competing for scarce resources, and conference slots?
- Are there gaps in the coverage of Sections (e.g. in the corporate sector) which should be catered for by new Sections, especially in the light of the demise of FID?
- Are there undesirable overlaps between Sections with similar interests?
- Should there be a realignment of Sections within Divisions?
- Should there be easier ways in which Sections can collaborate on projects and conference programmes?
- Are there ways in which we can release more resources for professional programmes?

There may, of course, be other matters which you and your Section may wish to consider, with the overall objective of making IFLA more effective as a key player in the developing global information society.

The Professional Committee asked me to write to you at this early stage, so that you and your new committees which will take office shortly can begin thinking of the issues. The Committee has not yet set out any criteria for the review. But it will do so in due course. I will write to you again to let you know what they are, and the means by which you and your Section take part in this review.

The Professional Committee, although it has set 2007 as the date for the formal review, wishes to encourage Sections to think about, or even propose mergers before that date.

With very best wishes to you and your Standing Committee,

Yours sincerely

Ross Shimmon
Secretary General
Ross.shimmon@ifla.org

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CLENExchange quarterly print subscription is just \$20 a year. Download subscription form at <http://www.ala.org/alaorg/rtables/clene/clenexchange.html>

MIT OpenCourseWare, <http://ocw.mit.edu/index.html>

With MIT OpenCourseWare, the Massachusetts Institute of Technology plans to make course materials for nearly all its undergraduate and graduate subjects available online, free of charge to anyone who cares to use them. An ambitious project created as part of the university's mission "to advance knowledge and education to best serve the nation and the world," MIT OpenCourseWare currently offers course materials for a wide range of subjects, including biology, with much more on the way. Users should bear in mind that MIT OpenCourseWare is an information learning venue only, not a degree or certificate-granting program. This site is also reviewed in the January 24, 2003, NSDL Life Sciences Report.

NURTURING THEOLOGICAL EDUCATION – Australian and New Zealand Theological Library Association 18th Annual Conference, 10-13 July, 2003, Perth, Western Australia

For further information contact: ANZTLA Chapter of Western Australia, Telephone 08-9212 9279, Fax: 08 9212 9380, e-mail: marino.elisa@cathednet.wa.edu.au

OCLC Library Training & Education Market Needs Assessment Study

In September 2002, OCLC Online Computer Library Center contracted with Outsell Inc. to survey libraries about the training and education needs of library workers. The survey was designed to define the needs of libraries for training and education, and to discern how OCLC might help serve those needs through provision of online training offerings. A major focus of the survey was the use of web-based training for library workers. Outsell received 2,112 responses to the survey, 32% of which were from outside the United States. Both “consumers” (library workers who select their own training) and “Influencers” (library workers who select training for others) responded to the survey.

The study:

- Identified a benchmark for library spending on training
- Identified a benchmark for the amount of training library workers receive
- Helped to define the kinds of training libraries need and where those needs are not being met
- Indicated the trends in web-based training in libraries
- Provided direction on where to focus efforts in the development of web-based training.

OCLC is hopeful that the report will provide librarians and others making training and education decisions, with information to support activities at their institutions and will also encourage suppliers of training and educational opportunities to support the needs of libraries as defined in this report. OCLC will continue to work with its Members Council’s Task Force on OCLC’s Role in Staff Development to determine how the results reported in the study may be used by OCLC to shape its future activities. For further information see: <http://www.oclc.org>

Information on the looting and burning of Iraq's National Library and National Archives, following the destruction of most of the contents of the National Museum is available on the (Australian) ABC website at <http://www.abc.net.au/news/newsitems/s831324.htm>.

I am attending an emergency meeting, called by the Director General of UNESCO, to be held in paris on Thursday 17th April 2003 to discuss the best ways of responding to the desperate situation arising from the looting and destruction of cultural property.

>From the New York Times:

[...] Among other buildings afire or still smoldering in eastern Baghdad today were the city hall, the Agriculture Ministry and so thoroughly burned that heat still radiated 50 paces from its front doors the National Library. Not far from the National Museum of Iraq, which was looted on Thursday and Friday with the loss of almost all of its store of 170,000 artifacts, the library was considered another of the repositories of an Iraqi civilization dating back at least 7,000 years.

By tonight, virtually nothing was left of the library and its tens of thousands of old manuscripts and books, and of archives like Iraqi newspapers tracing the country's turbulent history from the era of Ottoman rule through to Mr. Hussein. Reading rooms and the stacks where the collections were stored were reduced to smoking vistas of blackened rubble.

Across the street, a lone American tank roared out of the monumental gates of the Defense Ministry, untouched by the looters presumably because they knew that the ministry, at least,

would be under close guard by American troops. Almost as much as the civilian casualties from American bombs and tanks, the destruction of the museum and the library has ignited passions against American troops, for their failure to intervene. How far these passions offset the widespread jubilation at the toppling of Mr. Hussein is impossible to tell, in part because of the differing views within the population. [...]

New York Times on the web:

<http://www.nytimes.com/2003/04/14/international/worldspecial/14BAGH.html?pagewanted=2>

We will post more information as it becomes available.

Ross Shimmon
Secretary General

BOOK REVIEW SECTION.....

Massis, Bruce E., MLS, MA, The Practical Library Manager (New York, London, Oxford: The Haworth Press, Inc., 2003). 149 pp. ISBN 0-7890-1766-0 (pbk.)

This is necessarily a mixed review. While the title indicates a focus on management, this work more accurately reflects the author's eclectic view of various topics that highlight technology and staff development. Chapter titles include: The Challenge of Staffing, The Impact of Technology on the Library Manager, Building Core Competencies for Library Staff, Creating and Implementing a Technology Training Program for Library Staff, Evaluating a Technology Training Program for Library Staff, Clicks and Bricks [electronic access vs physical site], The Challenge of the Virtual Library, The Library Consortium, and Practical Library Development. The final chapter provides an annotated list of the author's pick of "management classics for the Twenty-First Century Library Manager." Appendices include ALA-Accredited Library Schools [including contact information, degrees offered, and distance education offerings], and two survey forms ["Technology Needs Assessment Questionnaire" and "Staff Training Outcomes-Seflin Evaluation Survey"]. Various selected bibliographies complete the book.

While the author has extensive experience as a library manager, this book is uneven, containing many web references [which must be regarded as ephemeral since web sites frequently change]. There are numerous bulleted lists that are frequently drawn from other sources. The bottom line is that the book simply cannot be considered a comprehensive guide to library management, practical or otherwise.

Having said this, these same lists and URLs can give clues that may be helpful to the library manager, within the caution that some of the information may already [or soon will] be dated. It would be more accurate to regard this text as a resource book from which the manager can select avenues to explore.

Reviewed by Darlene Weingand

Benson, Allan C. COMPLETE INTERNET COMPANION FOR LIBRARIANS, Second Edition, Neal-Schuman NetGuide Series, Neal-Schuman Publishers, Inc., New York, NY (2001), 566 pages.

Review written by: Ioanna Mouridou, MA, Institute of Data Processing Management (London, UK), Institute of Marketing (London, UK)

Allan C. Benson, Director of Library Services at Arkansas State University, “is known throughout the U.S. for his pioneering work in integrating Internet services into traditional library practices”. He is author of several other Internet and communication-oriented works (excerpted from “About the Author”, p. 566)

This massive paperback text, a monumental work on the state of the art in INTERNET usage for American libraries, consists of seven parts and twenty-eight heavily detailed chapters about different aspects of library cybernetics. The “parts” deal successively with:

1. Essential background to the INTERNET (including addressing systems and valuable copyright and digital information)
2. What is needed to connect with the INTERNET: hardware, software, the software “toolbox”, security and virus protection
3. Tools and resources focussing especially on search facilities and web resources, file transfer, Telnet, on-line catalogues, reference integration tools and free access services
4. The creation and editing of multimedia presentations for web pages
5. Contemporary communication systems including sophisticated approaches to e-mail, mailing lists, Usenet News
6. How to use the library as an electronic publisher over the Web; the implementation of Web-based search engines and databases, digital publishing and digital libraries
7. Extensive appendices.

Taken altogether, the information presented in this text seems to comprise the learning of a lifetime about the Internet and its applications for librarians. This is, no doubt, an exaggeration, as almost all of the contained material appears to be relatively current and relevant to today’s library activities – in itself a considerable achievement. It is also true that “crucial” details about the Internet and its applications flourish and spawn at a terrifying rate – sometimes leading to the appearance of great scholarship where only an eye for details, technical specifications and the minutiae of process development exists. In the case of this particular text, however, the learning, the comprehensiveness, the critical perception and the finer points are all there. Unquestionably, this work must stand as one of the major reference works of the year for American librarians using the Internet to promote library collections over the Net and to access Net-based services for the benefit of their clients.

From beginning to end, the presentation of complex and often technical material is handled with economy and a straightforward determination to render the typically unpalatable in clear, concise and readable English. Nowhere does the author succumb to the temptation to sound like a technocrat. Through 550 A4-sized pages he writes firmly, almost sparsely and with textbook clarity. The difference between this and other similar manuals is that any literate high school graduate could read, appreciate and *apply* the material in this volume. Considering the nature of the contents, that is no mean feat. As an aid to presentation, there are 39 well-organized tables and another 56 figures. Rather than hedging around the subject, many of the tables list the data a user is most likely to need. For example, on page 88 is found “Table 6-3: ISDN modem manufacturers”.

A copy of this table is reproduced below as an example of functional elegance and economy of presentation.

Name	URL
3Com	www.3com.com/products/isdn.html
Arca Technologies	www.arcatech.com/
IDS Technologies	www.idstech.com/
ISDN*tek	www.isdnstek.com/
NT1 Solutions	www.nt1solutions.com/
Sagem	www.idn
WaveRunner	www.isdnwave.com/

It is interesting to note how Allan Benson manages to deliver masses of information that should floor an adult in a format suitable to the consumption and comprehension of an advanced child. He treats the reader as an equal – instructs in the process – presents enough well-organized material to be going on with for many months – sets by appropriate future reference sources, lists and contact data in places where they can easily be located and updated but in no way impede the flow of the text -- and leaves the reader with a pleasant taste in his mouth about subject material which is far from intrinsically appealing.

The author of this book review is hardly an expert on the Internet even though I find I am on it and off it almost all day long. I know that the Word Wide Web has its manifold and valuable uses. And I know that it also offers perils of several sorts for individuals requiring its services for professional or occupational purposes. As an instructor in electronic technology, I must be perpetually “up on” Internet facilities. But as a writer I need, above all, to be able to communicate clearly and directly – without unnecessary circumlocution – and without undue waste of time. The teacher in me knows that the time dedicated to the development of homepages and web-accessed services is necessary in this year 2003. But the time may be dearly purchased, and often there is simply not enough of it to make a good job. For the working librarian, much of the material presented by Benson in this massive book will be found to be constructive and definitely time-saving. I cannot think of any greater encomium to submit about a text dedicated almost exclusively to the dry and dusty matters of technical procedures, reference material provision, “electronic communications systems development” and database *searches* as opposed to those much more satisfactory and desirable database *deliveries*. This work is fundamentally useful; that its presentation is also interesting is a literary triumph.

The quality of the publication by Neal-Schuman is exceptional. Paperback format for a heavy reference manual containing nearly 600 sheets of good-quality A4 paper was possibly necessary to help keep the selling price reasonable; it may result in a broken spine rather soon and then in a coverless condition not long thereafter. However, the number of printing errors is minimal, and if the occasional pronoun harks back to a questionable referent, that is hardly a point of criticism in a work of such length and intensity. The reader is recommended to take a brief tour through the entire work and then *to sit and read* through “Chapter Twenty-eight: Digital Publishers and Digital Libraries” (pp. 479-496). He will be pleasantly surprised to find an extremely clear and knowledgeable discussion about the differences between them and the applications of each. Finally, should some readers of this review consider any text containing its share of “technical jargon” to be invariably off-putting, I would like to suggest this same chapter, modestly sandwiched at the back of the book, or the chapter dealing with copyright regulations, as good places to commence a revolution in attitude. *Allan C. Benson, at least in*

this present work, demonstrates that the subject matter has very little to do with the readability of the text. Even as the volume ages and becomes technically obsolete, a fate soon to overtake it, it will remain, despite multimedia and the prevalence of the Internet, a speaking monument to the supremacy of **effective presentation** as the **primary medium** of English-language communication.

The ROI Report and E-Training by Bruce E. Massis

E-training, that is, training coursework, workshops and seminars delivered either online or by computer, is increasingly being integrated into staff training programs in libraries. Is there a means by which the library can gauge whether or not there has been a positive return on its investment (ROI) through its staff training program, specifically the component delivered through E-training? If so, then what is the appropriate tool that should be employed to measure the program's success? The answer is the "ROI" ("return on investment") report.

First, let us assume that a library has created a set of core competencies for all of its library staff positions. Inherent in those core competencies is a mandatory obligation by staff to satisfy certain continuing education and training components prior to their receiving either positive annual personnel reviews or to seek advancement. The library has taken its first step toward creating an organization-wide continuing education and training program for its staff.

The library administration has guaranteed the implementation of its training program by including a line item in the annual budget to fund the program. That line item, as recommended by the most successful companies in the private sector, is equal to approximately 5% of the library's annual total salary expenditure. A Training Administrator (TA) or training team (if our library is a larger system) has been named by the library. All of the decisions have been made regarding the *level* of training needed based upon the results of a "needs assessment survey" conducted by the library TA. The TA has recommended specific areas of concentration that will comprise the staff training program. How then, will training be delivered to the library staff.

Discussions have been held to determine how much training will be delivered through E-training methods? In whatever manner the training is delivered, there will undoubtedly be numerous forms of technological components associated with it. What will be delivered via videotape, teleconferences, streaming media, web casts, CD-Rom, DVD or a newer technology just entering the marketplace? As flexibility will be desirable in the number and type of courses, seminars, workshops, etc. are offered, E-training is clearly the means by which a number of training competencies will be fulfilled.

Today, there is an increasing volume of training available to libraries on the web, from strictly desktop application courses to professional management courses, to high-end information technology courses to "library specific" courses offering training on a variety of library-related issues for every level of employee.

E-training also offers the flexibility of scheduling, which, in an era of short-staffing and longer working hours, is vital to the success of a library training program. E-training is convenient for staff taking courses, accessing individual lessons of a course, or even for repeating parts of a course. Learning styles differ and E-training may not be suited to everyone. In fact, no more than one-third of the library staff may be expected to participate in a regular program of E-training. The other two-thirds will prefer traditional learning styles, where they can learn in a group with an instructor. For this group, the allure of training's social component remains an attractive feature of the learning process. But, given the nature of library staffing, it is unlikely that this luxury will persist. After all, instructor led training usually requires staff to either leave the workplace entirely, or at least leave their desk in order to participate. Therefore, if only for

the reason of practicality itself, E-training, by necessity, will gain increased support as a training style in libraries.

Since training is now *required* in our theoretical library, how will accountability be measured? Libraries must find a means to evaluate and maximize the value of their *human* assets. So, how does the library measure its “return on investment” (ROI) of a staff training program? Since E-training is such a recent phenomenon in libraries, justification may be required. If this is the case, then the ROI report is the appropriate and defensible instrument for such measurement. According to training specialist Patricia Pulliam Phillips, accountability is not isolated to one sector, one industry, or one type of program any longer. Its importance is engendered in organizations and programs of all types. But the actual implementation of accountability processes is still in its infancy in many sectors. The library world is just one such sector where the consideration of justification of expenditures by virtue of a ROI report is starting to emerge.

In every corner of the training and development field, the pressure to measure the return on investment is intensifying. At some time or another, virtually every library will, undoubtedly, face this important issue. Whether in the private or public sector, providers of E-training specifically and training in general are coming under greater scrutiny and therefore, additional demand to issue “return on investment” data. After all, bottom lines are scrutinized so thoroughly these days, even in nonprofit organizations where there appears not even to be a *visible* bottom line, ROI will emerge as a mandatory element in cost-benefit analysis.

What is ROI?

What exactly is ROI? The term “return on investment” actually started life as a standard *accounting* practice and evolved into a means by which a cost-benefit may be realized. In the case of training, the library administration may ask, what is the direct benefit received by introducing an E-training program into the library? A gross oversimplification might well pose the question, “if we pay for it, what will we get out of it?”

Once the value of creating such a report is understood, a set of questions regarding the library’s training expectations must be determined prior to ascertain their ROI.

- How does my service delivery compare to other libraries?
- In what specific areas are libraries providing training?
- What value does the library’s investment in training provide?
- What targets should I set for my value return?
- How can I best communicate the value of library staff training?

A ROI report can be as simple as finding out if trained employees can perform their jobs better upon the conclusion of a specific training activity. Or, it can be designed as a complicated, economically based metrics report breaking down cost benefits into targeted, measured and graded percentages.

ROI is particularly effective at:

- Helping library managers prioritize investment by providing hard numbers to compare investment options. For example, if the library can negotiate an E-training contract with an outside vendor, it might be wise to do so rather than creating courses from scratch. While the price of software packages such as *Blackboard* and *WebCT*, used for creating unique E-training courses, have decreased sharply, the cost benefit of simply purchasing a vendor-created course will still be more favorable. After all, there are many staff hours involved in creating unique courses and the learning curve necessary for mastering the courseware can be somewhat daunting.

- Setting a program design threshold for E-training projects that deliver ROIs of at least 200%, wherever possible. For example, the library should set its sights higher when the expectation of ROI on E-training is designed. While an intangible such as, *has the training helped staff to better perform their duties, thus providing a higher level of customer service in the library*, may be measured using a variety of survey tools, the ROI report can still be valuable in delivering the hard numbers related to direct investment measurement of that intangible.
- Imposing some discipline on the part of vendors and decision-makers to support business impact claims by taking a more methodical and quantifiable approach to business justification. For example, one of the most difficult issues in contracting an outside vendor to train library staff is the inability to obtain quality statistical reporting from that vendor. The vendor assumes the library will collect such data on their own, or that the library will be more than willing to pay extra for them to create such a service outside their primary contractual obligations. It would be wise, then, to hold the vendor responsible to collect and deliver appropriate statistical data so that it may be available to the library for the ROI report.

A considerable cost savings will result in a positive ROI report.

Some E-training project justifications are based on cost savings alone where the cost of traditional training is compared to the cost of E-training. In an *integrated* training program, where traditional training deliverables such as instructor led and video training, are combined with E-training deliverables, the cost savings will vary. However, it is more likely that the cost of “packaged” E-training products will cost less than “live” instructor led training products because of the logistical aspects of the latter including, quite often, transportation of an instructor, hotel accommodations, meals, car rentals for the instructor, etc.

The ROI report should include a mechanism for forecasting the actual expected benefits, converted to monetary values, and then compare the benefits to the projected cost. Also, in order to determine the cost of the library E-training program, it would be preferable to separate the expected costs into *direct* and *indirect* categories. Most *direct* costs will come from equipment, such as computer hardware, software, and staff costs. Staff costs include the salaries and wages of anyone who works to provide the program. Staff costs should also includes such benefits paid to staff such as medical insurance and retirement. Benefits are at least 28% of salaries, but can often higher. *Indirect* costs are costs of overall library operations whose share can be allocated to the E-training program. They include things like custodial service, utility costs, security, landscaping, and other overhead expenses. Indirect costs may also include the cost of the facility and an overall administration fee to the library. This fee can range anywhere from between 20% to 50% or higher, depending on the institution.

In preparing the ROI report, the library must also consider whether it is better positioned to submit a “hard” ROI report, wherein the expenditure of funds proves that it can generate a specific return in a measured amount of time, or a “soft” ROI report, that offers expected assurances to enhance efficiency or customer satisfaction. If the library intends to determine the financial value, rather than simply the costs of library training, market values may be based strictly on the market value of the training and product services being purchased for the program. For example, if an *integrated* staff training program has been designed to deliver a combination self-study, instructor-led, and technologically-delivered training products, then a close analysis of products and services purchased to support the program can be designed to determine the actual cost *and* the market value of the staff training program.

Two Suggested Examples of the ROI Formula

#1- Once a library has laid the groundwork, it can apply a ROI formula. Training ROI formulas vary, but here is a suggested one that may include the following general categories:

- Product data elements (what E-training products have been purchased for the program)

- Cost Categories (Direct/Indirect)
- Market Value Key (based upon the actual cost of products in the open marketplace)
- Program Objectives
- Communications targets (overall promotion, e-mails, informational meetings, newsletter, web site, moderated forum)
- Methods of Measuring Effectiveness (Surveys, Focus Groups, Interviews, Case Studies)
- Tangible/Intangible benefits (expected outcomes)
- Effect of influences on program (geographic, time constraints, access to technology, seasonal fluctuations, motivation, profession isolation, attitudes towards E-training)
- Satisfaction measurement (on employee, management, library, customer)

When this information has been ascertained, then consider calculating the statistical data using the following steps:

Step 1. Add the costs over the training period for design and development, promotion, administration, delivery (staff or technology), materials, facilities, employee wages, lost productivity, and evaluation.

Step 2. Calculate the benefits, including labor savings, productivity increases, potential income generation, new services, and other cost savings such as lower maintenance, turnover, and debt costs.

Step 3. Divide benefits by costs to get the ROI.

A prototypical report can also resemble an exhaustive spreadsheet, complete with drop down menus allowing users to add and subtract factors that could affect the outcomes of the program, including implementation cost overruns, staff reductions and improvements in technological dependability.

#2- The ROI report could also include data elements that simply outline the costs of traditional classroom training as opposed to E-training. Such an analysis would include the following data elements:

Wages of Trainees for 1 week of training (500 employees@?/hr)
Travel Costs (50% of people traveling)
Trainer Wages
Trainer Travel
Development Costs (custom training)
Delivery Systems (library computers)

This example might better be employed when library managers have been requested to produce a ROI report *prior* to spending the money on a project, rather than simply using it as a yardstick for spending after the project is complete. It all depends on the level of sophistication expected by the library.

Practical Elements for Calculating ROI:

Here are several things a library can do to lay the groundwork for calculating and securing positive, accurate, and persuasive ROI. Consider the solution. Before you commit to training, identify your challenge, and make certain training is the best solution. For example, if the problem is poor customer service, perhaps an ongoing series of sensitivity training workshops may be more appropriate rather than a full-blown skills training program.

1. **Get a baseline.** To calculate training benefits, quantify the *before* environment. Measure everything that training might improve. For example, if you're training employees about sexual

harassment, review the number of employees, any filed lawsuits over the past five years, and insurance premiums and the cost of penalties. Have there been any such suits filed by staff due to the public's open access to computers in your library?

2. **Automate.** Learning management software (LMS) can track data as courses taken and learners' performance before and after. However, LMS can be pricey, ranging into the mid-six-figure range. Tracking the staff's progress in the E-training environment is relatively simple function, as long as there is an understanding between the administration and staff that data collected regarding their E-training habits will not be used against them.
3. **Maximize training benefits.** Reinforce training benefits through practice and positive reinforcement such as rewards, notes, special honors, recognition in a library wide email. Those measures can stimulate results and amplify training efficiency.
4. **Measure customer satisfaction levels *before and after* training.** Through surveys and focus groups with customers, measure their satisfaction with services that can serve as a direct link between what has been learned by the staff and the means by which it has affected customers. This can be accomplished with the goal of ascertaining whether or not the E-training program has been successful.
5. **Consider the payback period.** The ROI report should include the payback time to make it persuasive. For example, if the library invests \$100,000 the first year in its E-training training program, then what is the estimated time in terms of staff retention, increased staff recruitment, customer satisfaction, increased usage of library programs and services, etc. that the library is likely to see that 200% market value returned?

A Small Scale Rollout instead of a library-wide program?

It may be wise for the library to try a small-scale implementation of an E-training program, perhaps without all the bells and whistles, using a "control group" that includes a representative sample of the staff. This demonstration program will identify the courses to be offered, the outcomes sought and, by the use of pre and post testing, as well as other determinant factors, in order to determine the success of the program. If the ROI report results prove positive, the library administration would be more likely to roll out the program for the entire staff.

Conclusion:

By writing and submitting a *defensible* ROI report on staff training, library managers can improve their chances at securing funding for newer, more advanced learning initiatives. Technology completely reinvents itself in a shorter time span than ever before and the newer technologies will, undoubtedly be developed that may be employed to deliver E-training in a more effective manner to an even larger learning audience.

The ROI report can provide a solid foundation for optimizing training the library is already conducting, thus creating a strong case for its continued existence. As available funding for libraries remains flat or shrinks in the near future, it is likely that ROI will play a larger role in how program decisions are made. More often than not, it will be increasingly difficult to get a non-ROI project approved. While it is not always easy to quantify, track, capture, calculate, and report every cost and benefit around training, if you can collect and justify the data, you can be certain that the E-training program will find a level of sustainability in the library.

A Select Bibliography

The primary published resource on ROI as it relates to training remains Jack J. Phillips' [Return on Investment in Training and Performance Improvement Programs](#). First published in 1997, this work provides easy-to-understand guidelines for the preparation and the value of the ROI report.

Therefore, the select bibliography begins with that book. Then, all else follows.

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Appendix –

For those who are not yet experienced in producing the ROI report, there are training courses offered through a number of prestigious business schools. Such courses may be found listed under *Financial Engineering*, *Computational Finance*, *Mathematics of Finance*, *Financial and Industrial Mathematics* or, *Quantitative and Computational Finance*.

- MIT's Sloan School of Management
<<http://mitsloan.mit.edu/roi/main.html>>
- Boston University School of Management, <<http://management.bu.edu>>
- Carnegie Mellon University, <<http://student-2K.gsia.cmu.edu/mscf>>

These universities offer similar project management programs:

- Columbia University <http://www.math.columbia.edu/department/masters_finance.shtm>
- Georgia Institute of Technology <<http://www.gcf.gatech.edu>>
- Oregon Graduate Institute <<http://cse.ogi.edu/compfin>>
- Purdue University <<http://www.stat.purdue.edu/purduecf>>

- University of California, Berkeley, <<http://haas.berkeley.edu/MFE/index.htm>>
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