Implementing a new integrated library management system in a public library consortium: a case study on strategies for effective staff training

by

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Dedication

This dissertation is dedicated to my parents, Mrs Elizabeth Mchieve Yenge and Ityoor (Chief) Joseph Ayemekpe Yenge, you are the foundation on which my life stands, and your love, and wisdom and teachings is the concrete mix that bonds me steadfast.

This study seeks to answer the research question: What factors influence effectiveness of ILMS staff training in public library consortia?

In addressing this question the research is done on a case study of a public library consortium in Australia. The study used qualitative research methods involving a semi-structured asynchronous survey questions. Survey questions were distributed via email to individual participants coordinated by the Consortium manager. This study is anonymous. Only the Consortium manager is known to the researcher. The Consortium manager has given consent to be attributed; however, the Consortium manager as well as the organization is not named in the study.

This study is based on participants experience and it is supported by library literature. High quality responses were received from five participants. These responses were then analysed under the chapter headings: Goals for the ILMS implementation; Challenges experienced with ILMS staff training; and Strategies for effective implementation of ILMS staff training. Each chapter proceeds with analysis of the collected data, followed by a discussion that draws on supporting literature.

The study has identified factors that influence the success of ILMS staff training. Some of these factors include: The need for library group members to compromise on their standards and work practices; and to work collaboratively for the benefit of the consortium; the need to get staff from member libraries involved at all stages of training; the need to involve competent and enthusiastic staff with training; the need to have a support mechanism for staff throughout the training; and the need to use an integrated training module of face-to-face, web based training and self-paced training to provide flexibilities for staff participation across the consortium; and the need for good planning.

This study has identified the unique requirement of member libraries joining in a public library consortium and the advantages of such arrangement. The study has identified some of the challenges of training in a library consortium; and provides some insight into understanding strategies for managing those challenges.

This study is possible because of the help and guidance of several individuals who have assisted me in one way or another. I appreciate you all.

I wish to offer special thanks to Dr Chern Li Liew for supervising this study. Her valuable suggestions helped to guide this research to a successful completion. Thanks also to my lecturers at Victoria University of Wellington, Charles Sturt University, and Syracuse University. This is also a great opportunity to thank Victoria University of Wellington Library staff for providing me with the materials needed for this research. My off campus requests were all satisfied timely.

I would like to express a great appreciation to the organisation in my study. This study was possible because of the contribution and support of the Consortium manager. I extend this appreciation also to the individuals who participated in this study. Unfortunately I am unable to mention names because of the anonymity of the study but if they read this they will know how grateful I am to them for making this study possible.

The completion of this study would continue to be a dream without the love of my family, my husband, Dr Love Mngohol Chile; and my children Love Junior, Love-Ese, and Denen who inspired, helped, supported and encouraged me throughout my time in the MIS program.

I warmly thank my brother Sampson Tersor Yenge, for his thoughtful and valuable spiritual guidance, and support during the period of the study.

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Chapter 1

Problem Statement and Rationale for the Study

1.1. Problem statement

My professional experience as a Library systems consultant has involved providing training on Integrated Library Management Systems (ILMS) in single library network environments. However in the last four years since 2008, I have become involved with ILMS implementation projects and training for public library consortia. This study provided the opportunity to selfreflect on the challenges faced in implementing ILMS training in this type library environment.

I have not found much literature in the area of ILMS training in public library consortia. This study therefore provides some insights into understanding some of the factors that make ILMS training effective in public library consortia. Although the study focuses on one case study, the findings will be useful to organisations in providing them useful information when they undertake similar endeavour. It also provides ILMS vendors with the opportunity to explore approaches that may provide more effective training to public library consortia environment.

The unique requirement of member libraries joining in a public library consortium, the potential of such arrangement, and its challenges makes this study useful in providing some understanding of strategies for managing the ILMS implementation of staff training specifically to public library consortia. It also contributes to the literature that focuses on ILMS training in library consortia of 'public library' nature.

1.2. Definition of terms

Bostick, (2001, p.6) defines a library consortium as "a group of two or more libraries that have agreed to cooperate with each other in order to fulfil certain similar needs, usually resource sharing".

An integrated library management system [ILMS] is the heart of library management. For this study, I adopt Grosvenor's definition which defines ILMS as, "the collection of software programs, usually divided into modules, which control the cataloguing, circulation, acquisitions, information retrieval, and various utilities which control the automated library services". (Grosvenor, 1997, p.1). ILMS are acquired from ILMS vendors. Wang, (2009, p.211) provides a lists of major ILS [ILMS] and describes major ILMS vendors as "a company in academic, public and consortia marketplace with significant numbers of installations and support contracts. An ILMS migration [implementation] is explained as "undertaking to implement new [ILMS] systems for gaining additional functionality, such as next-generation catalogs" (Gervone, 2007, p.7). Epstein, (1990, p.89) emphasises that "training component" of the migration process is paramount to the success of the project.

Robbins, Pergman, Stagg, & Coulter, (2008, p.1) define effectiveness and efficiency in context of attainment of organisational goals; "doing the right things or completing activities so that organizational goals are attained. They define efficiency as "the means of getting things done". Efficiency and effectiveness are related in the sense that they both target powerful results. Being effective means producing the right results; and being efficient means producing results with little wasted resources. This study examines effectiveness of ILMS staff training in public library consortia.

1.3. Research Objectives and Research questions

1.3.1. Research Objectives

The objective of this research is to undertake a case study on the experience of a public library consortium that has been through the ILMS implementation process with a view to understanding the strategies they adopted to implement effective ILMS training. The focus of this study is to examine the potential issues or challenges that public library consortia face in training staff in time for their Integrated Library Management System (ILMS) implementation.

Once the ILMS goes live, the focus moves to staff development. This is beyond the scope of this study.

1.3.2. Research Questions

What factors influence effectiveness of ILMS staff training in public library consortia?

This question is explored with three further sub-questions:

- What are the public library consortia goals and objectives of the ILMS implementation staff training?
- What types of challenges are experienced with ILMS staff training in public library consortia?
- What strategies are effective for implementation of ILMS staff training in public library consortia?

In answering these research questions, this research will look at training methods such as:

- ILMS vendor training.
- In-house training.

And:

Scope of the training methods:

- Face-to-face training.
- Self-paced training
- Internet web based training

Literature Review

2.1. Library Consortia

The term library consortium is used in multiple name forms including "alliance," "network," "system," or "association" (Dong & Zou, 2009, p.1 and Verzosa, 2004, p.2). Taole & Dick, (2008); Verzosa, (2004); Dong & Zou, (2009) list the types of library consortia as special libraries, national consortia, centralized funded state wide consortia and public library consortia. Most public library consortia are identified by geographical proximity or regional boundaries and geographical affiliation. (Dong & Zou, 2009; Ball, 2003).

The library consortium concept appears to have developed from the historical co-operative arrangement which libraries had in place for the purpose of sharing of information resources such as inter library lending (ILL) services (Kopp, 1998; Perry, 2009; Alexander, 1999; Missingham & Moreno, 2005). Alexander, (1999) traced the beginning of the co-operative arrangement to the 1890s and identified this period as the milestone in library co-operative partnership. Their study however focused on American co-operative, with American Library Association as the coordinator of the co-operative projects. I have not found literature that supports the evidence of such co-operative arrangement in other parts of the world in the 1800s. The co-operative arrangement is discussed as taking shape in different part of the world from the 1980s (Nfila & Darko-Ampen, 2002 and Dong & Zou, 2009). Other authors appear to see the growth of library consortia around the world in the early 1990s. Alexander, (1999); Hirshon, (2002); Perry, (2009) attribute this growth in library consortia to the formation in the mid-1990s of an informal discussion group of Consortium managers which first formed as "the Consortium of consortia" (COC). COC which constituted mainly the European academic institutions made significant contributions that would later mature the group into an international organisation "the International Coalition of Library Consortia" (ICOLC) with over 200 library consortia in North

and South America, Europe, Asia and Africa (Perry, 2009, p.123). Dick and Taole, (2008); Rowley and Slack, (1999) note the appearance of library consortia in African countries in the 1990s. Nfila & Darko-Ampen, (2002) lists the African consortia as CALICO, GAELIC, FRELICO, SEALS, CATNIP and EASEL. The appearance of other nationwide consortia outside of the USA in the 1990s is noted by Shachaf, (2003):

- Australia -- CAUL CEIRC (1998). Council of Australian University Librarians Electronic Information Resources committee. Involves 39 academic libraries.
- China -- CALIS (1998). China Academic Library and Information System. Involves 70 academic libraries.
- Israel -- MALMAD (1997). Israel Center for Digital Information Services. Involves 8 academic libraries.
- Italy -- INFER (1999). Italian National Forum on Electronic Information Resources. Involves 15 academic and special libraries.
- Micronesia -- FSM (1999). Federated State of Micronesia Library Service Plan 1999-2003. Involves all libraries and agencies.
- Spain -- REBIUN (1996). Committee of the Conference of Spanish University Principals. Involves all (47) academic libraries.
- UK -- JISC DNER/NESLI (1996). Joint Information System Committee, Distributed National Electronic Resources / National Electronic Site Licensing Initiative. Involves 175 academic libraries.

The driving force for the co-operative arrangement among libraries from the 1980s is Library automation, the growth in publications and information explosion (Nfila &Darko-Ampen, 2002; Giordano 2002, p.147). The rapid growth of the internet technology, the increasing costs of information resources, attributed to the exponential rise in library consortia from the 1990s (Dong & Zou, (2009, p.1); and Alexander (1999, p.8) stated that:

1990s may prove to be the decade in which these efforts reached a new and exciting level of richness, complexity, and importance. This milestone can be linked directly to the maturation and ubiquity of the Internet in the early part of the decade, followed soon afterward by the availability of graphical browsers and the World Wide Web. Quickly, libraries found themselves presented with intriguing new opportunities [consortia options] to provide access to a rapidly growing array of full-text electronic content with rich graphics and jazzy hyperlinks to cited references, formulae, datasets, etc., all in a distributed network environment. The "virtual library" actually had arrived.

Typically the consortia of the 1990s were affected by the "advent of widespread licensing of electronic information resources" (Hirshon, 2002, p.148). The increasing costs of the electronic online resources and the fact that the online resource can share connectivity meant that vendors and publishers as well as the academic library community saw the need to explore consortia purchasing models that will shape the trends in resource sharing by member libraries thereby reducing costs. Thus Hirson observes that "…as this resurgent consortia movement has begun to mature, and as publishers and vendors have begun to adapt to consortia purchasing models, even consortia that only formed within the last decade have begun to expand their agenda for action to seek new ways to work with and for their member libraries" (Hirshon, 2002, p.148). Missingham and Moreno, (2005, p.29) argue that:

The formation of consortia to purchase electronic journals sets has resulted in a significant increase in electronic journals available to Australian users, particularly through the Council of Australian University Librarians (CAUL) and Council of Australian State Libraries (CASL) consortia. The dramatic increase in availability of current journals has enabled more immediate access to these journals for users.

In addressing issues of digital divide especially as it relates to public library services, Ghosh, (2004) and Fitzgerald & Savage (2004) see the advancement of Information and Communication Technologies (ICT) during the 1990 as influential on information accessibility which in turn has impacted of the formation of public library consortia. The democratic demands of citizens to have access to worldwide information meant that governments needed to turn to public library networks as a means to providing public access to the internet. The pressure on public libraries to provide diverse and flexible mix of information technologies, network infrastructure and services for urban and rural population increased the need to maintain and build the funding base of public libraries requiring managers "to seek and maintain a much broader and more complex partnerships" (Fitzgerald & Savage, 2004, p.27). Ghosh, (2004, p.184) expresses the desire to

have public libraries across India to foster partnerships that will promote sharing of resources that will enable free flow of information and ideas that will benefit all citizens.

The immediate need and use of consortia for public libraries is to address funding issues. However, other authors argue that although consortia come together to save costs, they are "not simply 'buyong clubs' (Nfila & Darko-Ampen, 2002, p.207). There are other benefits of consortia such as shared ILMS, skill exchange and development, sharing of other resources, and collaborative planning (Fitzgerald & Savage 2004; Kochtanek & Matthews, 2002). Dong & Zou, (2009, p.8) argue that library consortia have played an important role in "shaping the national trends in information sharing in [China]". Most library consortia in China have "focused on sharing resources in the areas of co-operative acquisitions, cataloguing, reciprocal borrowing services, interlibrary borrowing and online document delivery, centralized staff training, and technological development". Bostick, (2001) explains that co-operative arrangement usually had an economic motivation such as sharing of services, of processes such as joint cataloguing of materials and of staff and user training, including group purchasing and training. Kochtanek & Matthews, (2002, p.164) explains that the reasons why a library joins a consortium is to: "improve access to resources, share access, work to fulfil a particular need and to reduce costs".

2.2. Integrated Library Management Systems (ILMS)

One of the main resources that library consortia share is the ILMS and their corresponding technologies such as the library catalogue. Breeding, (2004); Gervone, (2007); Tebbetts, (2006); Seeman, (2003); Brian, (2003); Vaughan, (2002); Ralson, (1999) have contributed significantly on discussion in various aspects of ILMS including ILMS conversions and migration processes.

There are benefits of a consortium sharing an ILMS system. Breeding, (2004); Froud, (1999); Bocher, (2009) talk about the importance of a shared ILMS in minimizing costs, and to share in "digital library initiatives" such as, library portals, discovery search systems, and reference linking environments that have grown to capture the interests of librarians as they consider ways to use technology to maximize their presence and value to their users" (Breeding 2004, p.1). Other factors that influence libraries to seek opportunities of sharing ILMS in a consortium is that nowadays there are robust and stable library management systems with capability to support a consortium of a large number of libraries; though the ILMS systems that are capable of running a consortium have higher costs. However, Breeding, (2004) argues that costs for each joining library are significantly lower than what it would cost each participant to implement its own ILMS system. "Costs for hardware, facilities, software licenses, technical support, and administrative overhead involved in a single central system can be significantly less than the offsetting costs involved in maintaining multiple independent systems" (Breeding 2004, p.1). Another very important factor is the cost savings in managing and administering the systems. Bocher, (2009, p.1) suggests that:

In a shared system, library staff must know how to use the system but they are not burdened with the additional major responsibility of managing and operating the system too. A system manager is responsible for the system's operations. The manager resolves technical problems and manages all the other "behind-the-scenes" details that must be addressed on a routine basis. Library staff members in each library using the system do not need this level of expertise ...

However, Kochtanek & Matthews (2002, p.164) identified a number of challenges associated with sharing an ILMS system. These include:

- The selected system may or may not best meet the needs of all individual libraries.
- The library does not exercise absolute control over system parameters.
- Up-front capital costs are involved.
- Some kind of formula is usually involved to determine a library's share of costs.
- There are higher administrative costs meetings.
- It usually saves costs over an in-house system. After the base costs for hardware and software, there are normally small increments of costs for the additional hardware and software that will be needed to support an additional library.

A further concern is that:

While all libraries are interested in reducing costs, they resist ceding their identity. A shared ILS [ILMS] implementation has to maintain the individuality of each library to the greatest degree possible, meet its basic automation requirements, and complement local policies and procedures. The degree of local control possible within a shared

automation system varies. While some consortium leaders establish a rigid set of policies to which everyone must agree in order to participate in the shared system, others offer the ability to configure the system, to accommodate individual library preferences (Breeding, 2004, p.42).

To overcome these difficulties, some studies have suggested that participating organizations in consortia should state clearly their needs in joining the partnership. Those needs should be negotiated to align with the core values of the consortium organization (Gorman & Cullen, 2002; Ching, Poon, & Huang, 2003).

2.3. ILMS' staff training effectiveness

Ralston, Rioux, & Ellis, (1999, p.407) note that much of the success of migration from one automated system to another depends on staff training. Cohn, Kelsey, & Fiels, (2001); Taole & Dick, (2008); Julich, Hirst, & Thompson, (2003); Commings, (1991); Kochtanek & Matthews, (2002) explain that careful planning of training in shared ILMS is paramount in the contract negotiation with ILMS vendor. Organizations need to create clear objectives for training in advance and to create an environment that is conducive especially considering that staff trainees can be resistant to re-learning new automated system skills. These authors encourage creating an environment that is fun for staff to learn the new system. Planning the training sessions so that they are geared to the trainees' skill levels especially where staff has to re-learn automated library systems.

Cohn et al., (2001); Hallmark & Garcia (1996) explain that training on new integrated system does not involve just learning how to use the system itself but in most cases involves staff learning new jobs and this can create stress in some staff members. Also, the new automated system usually has uncertainties, and where the selected system is seen by some staff members as not best meeting the needs of their library, these factors are likely to cause resistance and feelings of stress and confusion among staff members. Therefore the planning for ILMS training should start right at the stage when Request for Proposal (RFP) is developed. Key points to pay attention to include:

• Identify and plan your training needs.

- Describe in details what you expect to receive from the vendor's training.
- State objectives clearly and ask for a detailed outline of the training offered, including the curriculum. The amount of time spent on each segment, the number of people to be trained at once, and the cost.
- Ask what training aids the vendor provides, such as training databases, manuals, workbooks, indexed and well-organized documentation, computer-aided instructions, instructional video, and web-based tutorials. Ask if these can be downloaded or copied for future internal use.
- Request cost information on telephone support and follow-up onsite training.
- Inquire about videotaping training classes for review and for training of new staff.
- Require output measure that ensures satisfactory proficiency levels. (Cohn, et al., 2001, p.126).

Kontoghiorghes, (2001) identifies key factors that could affect training effectiveness after introduction of new technologies in an organization. The study found that " a training intervention would have a better chance of becoming successful when implemented in a particular organization where the employees not only are encouraged to learn and apply new skills and knowledge, but they are recognized for doing so" (p.259). Furthermore, "training effectiveness is not only dependent on the soundness of the training program and the prevailing training transfer climate, but the entire organization as a whole" (p.259). Long, 2005; Tannenbaum & Mathieu, (1991); Arthur, Benette, Edens, & Bell, (2003); Aguinis & Kraiger, (2009); Kraiger, Ford & Salas, (1993); McGovern, (2002) discuss the need to evaluate training to determine its effectiveness. For example, Long argues that "...evaluation data can help demonstrate that the training function contributes to the organisation's objectives and goals" and "the ability to show the effectiveness or the utility of a training course can help gain support for the training function when it is time to determine organizational budget allocation" (Long, 2005, p.2). Tannenbaum & Mathieu, (1991) have discussed the aspect of training motivation and commitment; and fulfillment. They argue that, "trainees who enter training with higher levels of motivation learn more, perform better, and are more likely to complete training than their less motivated counterparts"..."thus training motivation should be viewed as an important antecedent of training effectiveness" (p.760).

Hallmark & Garcia, (1996) discuss effectiveness of training from both a librarian's and ILMS vendor's point of view and offer advice for successful training in a new library automated system:

- Determine specific training objectives at the initial project planning stage and communicate these objectives to the vendor, "excellent training is critical for the overall success of the project".
- All staff involved should have advanced access to the training plan, documentation, and other materials supplied by vendor.
- Ongoing communication with staff throughout the training process is highly important.
- Allocation of environment that is conducive for training, including adequate training facilities and equipment.
- A careful selection of "local trainers" to receive "train the trainer" training from the vendor (p.166).

Other studies explore the different options of ILMS training, including vendor face-to-face training; in-house training; training offered at conferences; web-based instructor led training; and web-based self-space training. The standard practice with ILMS training is for vendors of ILMS to provide initial face-to-face training usually included in the ILMS installation contract. This practice requires vendors to train a selected number of staff - "train the trainer". Trained staff members are then assigned to run in-house training. Hallmark & Garcia 1996; Commings, 1991; Kochtanek & Matthews, 2002). It appears that it is increasingly a practice in libraries for library staff to train themselves in all facets of library job including training in ILMS. (Todaro, 2002). There is argument on the likelihood that existing library staff has adequate skills and presentation experience needed in teaching/training. Todaro, (2002); Kochtanek & Matthews, (2002); Cohn et al., (2001); Hallmark & Garcia, (1996); Halsted & Neeley, (1990) suggest things that should be done to improve quality of training including quality of in-house training. ILMS vendors provide lots of training options geared at providing libraries flexibility and convenience. Libraries can subscribe to a comprehensive collection of self-paced training courses which can then be made available online to staff to access at their convenience. There is a provision for managers to monitor progress of the staff learning (SirsiDynix.com, n.p., para. 3). Brown, (2001, p.54) suggests that computer delivered training [self-paced] is more effective than instructor-led

learning. However, Dalston & Turner, (2011, p.13) question what constitutes the effectiveness of online training. They further argue that while online training without facilitation can be delivered at a low cost and training needs are considered met, "relying solely on the canned online training may actually be cost-ineffective because long-term gains may be negligible" (p.27). Reed, L. (2010) also argues that self-paced training could be underused or not used as it depends on how highly motivated a learner is and that this training appears to appeal to 'self-directed' learners.

2.4. Literature Review Summary

Numerous studies have discussed the pertinent effects of library consortia in general including those associated with shared library management systems. Library literature does not appear to discuss the pertinent effects as specific to public library consortia and their ILMS training. Bugg, (2000, p.169) discusses difficulties associated with training staff in ILMS in an academic consortium. Challenges with the large number of staff in a consortium means that the ILMS vendors focus library staff training on selected staff to become the consortium's experts on all aspect of the system. Epstein, (1990); Commings, (1991) discuss the aspect of selecting the correct people for the vendor "train the trainer" training in many multi-location libraries. Gervone, (2007, p.61) suggests that an ILMS implementation in a very large institution has challenges with complexities, timing and costs associated with such a large scale project. Ralston et al., (1999); Cohn et al., 2001; Hallmark & Garcia, (1996) discuss uneasiness of staff with organizational change and offers advice on how organization should support staff with the change.

Ralston et al., (1999, p.410) discuss ILMS training in general and suggest that ILMS "training should be tailored to the library's situation, with documentation of local procedures as needed". This suggestion may provide challenges to public library consortia because public libraries that join in on a consortium come from different local or state governments with their own unique requirements. In Swift Library Consortium, for example, each participating library can keep and develop its own local policies that ensures each member library provides to "their local community's needs and circumstances" (Swift Library Consortium, n.d.). Breeding, (2004); Froud, (1999); Bocher, (2009) identify benefits with collaborative arrangement that aim at

improving quality of library services. The collaborative resource sharing is seen to facilitate exchange of expertise that adds benefits to a consortium for their ILMS implementation and training

2.5. Conceptual framework

While there is comprehensive literature on library consortia, much of the literature appear to focus on consortia that formed to explore resource sharing of electronic and online resources. There does not appear to be much discussion of public library consortia as compared to academic libraries. There also appear to be less recent publication on library consortia, thus little literature is found after 2005. Though there appear to be more recent blogs and field notes written in this area. ILMS is generally discussed in literature but there is less literature that focuses on ILMS specific to library consortia, even much less published literature under public library consortia. The current literature on ILMS training does not appear to focus on library consortia though much of the discussions are applicable to training of ILMS in any type of library. However, the unique characteristics of shared library management make literature in this area desirable in providing a better understanding of strategies for managing the ILMS implementation and staff training. Wright, (2008 p.58) suggests that there is an increase in library consortium as library finds this as valuable and necessary for all libraries. This study will therefore contribute to the literature on effectiveness of ILMS training in public library consortia.

Chapter 3

Research Design

This chapter explains the research design including data collection and data analysis methods. I explain the objectives of the study, and provide a description of the research population. The delimitation and limitation are also explained as well as the ethical considerations of the study.

3.1. Research Purpose

This study contributes to the literature in identifying strategies that make ILMS training effective in a public library consortium environment.

The aim of my study is to understand the experience of public library consortia that have been through the ILMS implementation process with a view to understanding the strategies they adopted to implement effective ILMS training.

3.2. Methods of data collection

This study uses qualitative methods of data collection. This approach explores participants' ideas and experiences using open-ended survey questions (Lawal, 2009; Cresswell, 2003; Bryan, 2008). This approach was adopted because this research seeks to understand participants' experience with the ILMS training. It allows for research findings to be developed from constructivist perspective rather than a positivist deductive approach from quantitative surveys. I have designed questions that require participants to provide descriptive answers that explore their experience. Survey questions therefore required participants to describe their experience that enabled me to gain some insight into the types of challenges they faced with training and the strategies they thought might make the staff training in consortia environment more effective.

Qualtrics was used to generate online asynchronous survey questions to collect data. Victoria University of Wellington has Qualtrics subscription for students, and an account is provided for accessing this secured website. Data that is collected is stored in this secured account. According to Lokman, (2009) Library and Information Science (LIS) "researchers are yet to adopt [online survey method] of interviewing in their qualitative research". I could not easily identify LIS literature that provided me a good example of research that adopted this method. However, literature on qualitative research methods has discussed advantages and disadvantages of online asynchronous survey. The advantages which attracted me to use asynchronous interviews include: cost saving, time efficiency in not having to transcribe data, and can interview more than one person at a time; and it can be geographically dispersed (Lokman, (2006); Bryman, (2008); James & Busher, 2009). James & Busher, (2009) added that "In asynchronous interviews, participants can reread what they have previously written, reflect on and consider their responses, enriching the text". However, Bryman argues that this method "allows participants to reflect more on questions before they answer and this may provide a "clean transcript" that loses spontaneity (Bryman, 2008, p.642). He further argues that online asynchronous surveys lack the "face-to-face rapport" and "loss of visual or auditory cues that are important in establishing motivation and commitment in survey participation.

I was convinced that my research design was highly engaging with questions that were sufficiently complex and procedures that preclude participants from reading ahead, and to reduce respondents skipping questions and thus minimising issues associated with missing data. Furthermore, Bryan, (2011) suggests that responses from online survey are more detailed and considered than face-to-face. "...online interview answers tend to be more considered and grammatically correct because [participants] have more time to ponder their answers and because they can tidy them up before sending them" (p.642). Adopting this method of data enabled me to cover a wider number of participants geographically; allowed participants to answer questions at their own pace, and provided me the convenience of not having to transcribe data.

The main challenge faced with the online survey is that, I did not know if, or when, or how many participants will respond to the survey within the two-week time period I allowed participants to respond. I was basically on the edge of my seat waiting.

This study is anonymous. Participants are not known by the researcher; except for the Consortium manager. The case study organisation is not identified and data is reported in aggregated form in such a way that individuals are not identifiable. The Consortium manager has agreed that statements from his responses may be attributed to him; however, I have not named the Consortium manager in the report. According to James & Busher, (2006) anonymous online interview makes it easier for participants to discuss more sensitive issues and to express their personal views.

The problem that this anonymous survey method presented is that I could not contact the participants directly to know if they had problems with the survey. Where I needed more information or clarification with the data collected, I could not identify the individual to contact them for clarification.

3.3. Delimitation

This study uses only one public library consortium as case study. This was primarily because of the time constraint for the project. While the study is limited to on public library consortium it is expected that findings will be relevant to other library consortia.

3.4. Research Population and Sample

This study employs purposive sampling technique that includes one public library consortium.

Bryman, (2008, p.458) describes purposive sampling as when a "researcher samples on the basis of wanting to interview people [organizations] who are relevant to the research questions. I developed the questions from the ideas I got from CPD25, (2004) and Kontoghiorghes, (2001).

An introductory email was sent to two public library consortia to explain the nature of the research and to invite them to participate. One public library consortium responded positively and gave their consent. I received no response from the other consortium despite a number of follow-up emails. My initial plan was to study two consortia libraries, in order to get a range of background experiences that compares and contrasts so findings could be more interesting.

However, it became necessary to adjust my study to focus on just one consortium when the time was running out waiting on the second consortium.

Research participants were only those individuals involved with the ILMS implementation and ILMS training.

The research process involved a selection of a small number of managers and another small number of trainers. Three groups of respondents were expected to participate in this study namely:

- Library managers
- Library in-house trainers
- Library Consortium manager.

I sent an anonymous survey link to the Consortium manger of the organization studied, who then forwarded the survey link to the most appropriate staff members to participate, targeting all consortium staff involve in training and all Library managers. My expectation at the start was that I would receive at least eleven respondents; five from Library managers, five from Library trainers and one response from the Consortium manager.

3.5. Data Collection

In line with Hallmark & Garcia, (1996), a range of about 15 open ended questions were designed to collect information grouped in these main areas:

- Consortia goals and objectives as related to the ILMS implementation and staff training; and number of staff trained.
- Variables that facilitate or impede training effectiveness.
- Methods of training and scope of the training methods, and evaluation of each method.
- How training is planned and managed.
- How the staff training is evaluated for its effectiveness.
- Problems encountered and potential areas of improvement.

The open ended questions according to Bryan, (2008, p.232) is where "respondents are asked questions and they can choose however they answer". Open ended question presents many advantages including the fact that they are useful for exploring new areas. However, open ended questions can be seen to be time consuming for both the respondent and the interviewers.

At the start of the survey, participants were asked:

- 1. Which of these roles mostly apply to you?
- a) Library manager
- b) Library trainer involved in ILMS training
- c) Both Library manager and Library trainer
- d) Library Consortium manager

Depending on which staff role is selected, appropriate questions appear to the selected staff role. All questions that appears to participants are mandatory.

3.5.1. Pilot Test

Before I commenced data collection, I conducted a pilot test. Teijlingen van, Rennie, Hundley, & Graham, (2001, p.289) describe pilot study as "mini versions of a full-scale study... as well as the specific pre-testing of a particular research instrument such as a questionnaire or interview schedule". In line with their advice that pilot testing is an important element of a good study design as it increases the likelihood of a success of a research; I conducted a preliminary test of a small scale to get an insight on:

- Time it takes for participants to answer questions
- The clarity of questions
- If participants are comfortable with questions

The pilot test was very useful. The pilot test participants informed me that the questions were clear, relevant to the study, and they did not take more than 30 minutes to answer. Two key

statements stood out for from the pilot survey which gave me the confidence to proceeding with data collection.

"I did not find any problems with the questions. They all seemed to be for a purpose".

"The questions were easy to understand but thought provoking. It took me longer than I expected – around 30 minutes".

3.6. Ethical Considerations

With regards to ethical consideration, this research is conducted in good faith. I did not allow personal values to manifest or sway the conduct of the research findings. The study adhered to ethical issues such as relating to privacy of organisation and individual participants involved. In so doing, this research conformed to the Victoria University of Wellington Human Ethics Committee guidelines. Prior to commencing data collection, I applied for and obtained approval from Victoria University of Wellington Human Ethics Committee to proceed with this study.

This survey was conducted anonymously and therefore individual persons who participated in the research were not identified by gender or by name. However, I could not guarantee the anonymity of the consortium because I have chosen only one consortium for my study. Also, as there is only one Consortium manager, it could be possible for someone to track down and identify who that person is. I therefore could neither promise anonymity nor confidentiality in this case. However, I have sought the consent of the Consortium manager to be attributed in the report.

At the end of the study and after the completion of the examination of the dissertation I will provide a summary of the findings and recommendations of the study to the Consortium manager. I will ask the Consortium manager to forward this summary of findings to participants and also to notify participants that an electronic copy of the study is available on the scholarly commons of the Victoria University of Wellington and they may be able to download the electronic copy of the study if they wish.

3.7. Background to this case study.

This consortium currently has about 20 library organisations as members and it is continuing to grow. This case study looks at the consortium's ILMS initial implementation training. As at the time of this study about 500 staff was trained. The member libraries joined the consortium in stages and therefore received training at different times. The ILMS vendor contract package is made available to members of the Consortium. These consist of two elements, namely:

- Basic Package; and
- Optional Extras.

"Each Participating Library in the Consortium is required to commit to the Basic Package components, and as the name implies, Participating Libraries can choose whichever component they wish to implement in the Optional Extras element. To-date most libraries have selected all of the options provided". **Consortium manager**

The ILMS training component in the package allowed up to 10 Library staff from each library group to receive onsite 'train the trainer' over 10 days comprised of 2 packages of 5 days each. It also included unlimited access to the ILMS Vendors e-learning electronic resource. Some web based online training from vendor was also included.

In setting up for the ILMS implementation training, the consortium firstly established training environment including training equipment. They then installed the ILMS staff client software on training workstations. The ILMS vendor provided a training system for the consortium to use to conduct training simultaneously with the ILMS implementation and data loading processes.

The Vendor's 'train the trainer' course ran and completed on scheduled. Consortium then went ahead to implement the core training to all staff in time for go live.

Training was conducted for all ILMS modules including:

- Cataloguing
- Acquisitions
- Serials
- Circulation
- System Administration
- Reporting
- Patron Access modules.

There is a Library manager for each member library. The Consortium manager is also the project manager.

3.8. Data Analysis.

The qualitative data collected in this study is not large enough to use qualitative software for coding. I am more interested in identifying the main themes and in emphasising on what participants have said. I have therefore adopted thematic analysis of this study. According to Howitt and Cramer, (2008); Bryman, (2008), thematic analysis is a commonly used methods of qualitative analysis.

Firstly, I familiarised myself with the responses from each individual question in line with Howitt and Cramer, (2008) who suggest that: "...familiarisation is a key to thematic analysis as it is for other qualitative methods". I used Microsoft word document to then group responses for each question under the staff role group of

- Library manager
- Library trainer
- Library Consortium manager

Grouping the data enabled me to easily identify emerging themes from each staff role group. Next, I identified common themes in textual data that adequately addressed my research question (Howitt and Cramer, 2008).

This study seeks to answer the central question "What factors influence effectiveness of ILMS staff training in public library consortia". In addressing this question I have analysed findings as relates to the sub questions: What are the public library consortia goals and objectives of the ILMS implementation and staff training? What types of challenges are experienced with ILMS staff training in public library consortia? What strategies are effective for implementation of ILMS staff training in public library consortia? Each of the following three chapters addresses each question.

Chapter 4

Goals for the ILMS implementation of staff training

Effectiveness of training is part of the success of an ILMS implementation which a consortium invests heavily in. Training of staff on ILMS implementation in a public library consortium in time for go-live is a large undertaking. The process can be stressful and demanding. The effectiveness of such a project starts with setting clear goals and objectives, and a well-planned strategy for the success of the training including a needs assessment for meeting the organisational goals. Needs assessment also helps in determining who will be trained in what modules of the ILMS, and the involvement of staff at all level in the process. This chapter addresses the research sub-question "What are the public library consortia goals and objectives of the ILMS implementation of staff training?"

Cohn et al., (2001, p.126) advise that right at the time of RFP, libraries should:

- Identify and plan training needs.
- Describe in details what [they] expect to receive from the vendors training program.
- State objectives clearly and ask for a detailed outline of the training offered, including the curriculum, the amount of time spent on each segment, the number of people to be trained at once, and the costs.
- Ask what training aids the vendor provides, such as training database, manuals, workbooks, indexes, and well-organised documentation, computer-aided instructions, instruction videos, and Web-based tutorials. Ask if these can be downloaded or copied for future internal use.
- Request costs information on telephone support and follow-up, and onsite training.
- Require output measures that endure satisfactory proficiency levels.

4.1. Organisational goals

I asked participants to explain what they thought the goals of the ILMS training were and the roles they played in ensuring that the ILMS training achieved the goals and objectives. I asked Library managers, Library trainers and the Consortium manger the same question. My aim was to see if differentiating responses reflected the different roles of staff participants. Key themes in responses that mostly came from the Library managers and the Consortium manager were that the goals for the training were:

- To ensure the seamless transition to a new ILMS.
- To ensure that all frontline staff was competent in the use of the new ILMS before it became operational.
- To reinforce standards and agreed levels of service and processes.
- To give the staff the appropriate skills for their position.
- To make sure all staff are fully trained in relevant module that reflect their position.
- To ensure successful implementation across libraries by sharing skills and knowledge and working cooperatively on the implementation project.
- The Consortium manager stated goal was:

"To ensure that all staff have the basic skills acquired through the provided training to enable them to comfortably manage the transition to the new ILMS and to ensure that the training provided is relevant to the core functions that the staff is assigned to perform".

When asked to explain the role that participants played in ensuring that the ILMS training achieved the goals and objectives, the key responses identified from the Library managers and Consortium manager were:

- Ensured staff had and continued to have time to attend training either in person or via internet.
- Coordinated the training for the staff trainers and worked towards ensuring that there is a consistency in the quality and parity in the training provided to all staff.
- Made sure all staff members were fully trained in relevant module that reflects their position; and they had all staff trained and competent in basic system skills before going live.
- Some Library managers expressed having a collaborative approach using consensus decision making and small specific subject workgroups.
- Some said they worked towards ensuring that all frontline staff was competent in the use of the new ILMS before it became operational.
- Library managers were also involved in developing the training program, co-ordinating trainers within the library service, co-ordinating the overall training modules and objectives; and making sure the training objectives were achieved.
- Responsible to oversee the training and make sure all staff participated.
- The Consortium manager ensured that all scheduled dates and tasks occurred as planned.

4.2. Discussion

Goals for training: Participants who answered this question were Library managers and the Consortium manager. Though stated differently, participants appear to share common understanding of the goals for the ILMS training which appears to be that, staff was fully trained in relevant modules that reflect their position; and that all staff were trained and competent in basic system skills before going live with the ILMS system. Participants stated the roles they played in ensuring that the ILMS training ran successfully. One can sense from the responses to this question a positive attitude and commitment to fulfilling those goals; thus the "desire to succeed" as described by their Consortium manager:

"For the duration of the [ILMS implementation] project, the participants have adopted a culture that can be best described as a "desire to succeed." Whenever challenges have occurred, the co-operative approach adopted by all members of the consortium has been outstanding". **Consortium manager**

"All Participating Libraries have been totally committed to the aims and objectives of the [ILMS implementation] project. They have willingly made staff available at different times to participate in the various activities. Of particular importance has been the willingness of each Library organization to collaborate between one another, particularly regarding the development of commonly agreed standards for use by all members of the Consortium". **Consortium Manager**

The findings from participants are aligned with the common goals of ILMS training as discussed in library literature summarised as:

- Quality of staff training
- Number of staff trained
- Complete training before go live
- Staff have basic skill acquired
- Training provided is relevant to core functions that staff are assigned to perform.
- Staff are component to use the new system

According Arthur et al., (2003, p.235), "objectives of training determine the most appropriate criteria for assessing the effectiveness of training". They further suggest that organisations should determine which of the goals can be attained through training, for example what must the trainees learn in order to perform their job effectively? Hallmark & Garcia (1996, p.157) advise that specific training objectives including level and type of training, and any constraints and time requirements should be set to avoid any "communication gaps" between Library and ILMS vendor.

Needs Assessment: Most systems training models emphasis on careful analysis of training needs 'Needs assessment'. That is training or "learning experiences designed to achieve institutional objectives" Goldstein, (1990, p.134). Wood, (2007) agrees that the outcome of any training must establish actual needs that will benefit an organisation long term. Arthur et al., (2003) see this as a necessary process that determines an organization's training needs and it "seeks to answer the question of whether the organization's needs, objectives, and problems can be met or addressed by training" (p.235).

Though the findings in this research question do not explicitly see needs assessment stated in the training objectives, responses have indicated that objectives ensured the training met the training needs of staff. Hence, Library managers were involved in co-ordinating trainers within the library service and co-ordinating the overall training modules and objectives; and making sure that the right staff attended the right training. Halmark & Garcia, (1996); Chatty, Baas, & Fleig, (2003); Tannebaum & Yukl, (1992) also argue that needs assessment helps trainers to know of special needs or specific needs of training ahead of time. These needs may include needs of staff that may be slow in learning; there may be newly employed staff in training. From my experience as a trainer I think that the needs assessment of staff with disabilities such as hearing impairment and compulsive syndromes should also be considered. Also, consideration for needs for trainers to understand the library processes and policies; ways of doing things ahead of time so that training could be conducted more effectively in meeting the organisational goals.

However, my study did not seek to look into if or what training needs assessment was undertaken by the organization in deciding which training modules was suitable for each staff that was trained within the consortium. The study did not examine how the needs assessment was adhered to for the effectiveness of the training. Connor, (1992, p.15) quotes various writers on the discussion of needs assessment including:

Baerg Epstein acknowledges that not everyone needs the same level of training, and recommends the development of training components ranging from a general overview for all staff, to specific training demanded only by a few 11, p. 92!. However, Thompson concludes from her survey that all staff should be trained in detail beyond their immediate job requirements as much as is feasible 14, p.22.

Chapter 5

Challenges experienced with ILMS staff training

Several factors can provide challenges with ILMS implementation training. In this chapter I have addressed the research question: what types of challenges are experienced with ILMS staff training in public library consortia? I approached this question by exploring with participants firstly, on what problems they experienced with the training. Secondly, I asked participants to describe any strengths and weakness with the training process that may be consortium related.

5.1. Problems experienced

I asked Library managers and the Consortium manager to list any problems that they and their library staff experienced with training. I also explored with them problems that were consortium related. The responses were grouped as:

• Tight timelines related issues:

"The tight timelines and migration to a different system, whilst attempting to cling to previously used functionality or effective work systems and practices caused some significant problems".

"Timing of the admin set up was right before Christmas, just too busy and stressful a time to take this on".

"Have to keep using the system to ensure your skills are maintained"

"Getting all staff to the training"

While the respondents did not explain in details what specific problems arose from tight timelines, a review of literature suggests that if little time is allocated to training, it can definitely be problematic. Hallmark and Garcia, (1996) suggests that adequate time should be allocated to training to allow staff to learn the 'new sophisticated systems'. "Training days should be spaced with intervening time to practice using the system, as otherwise there is too much to absorb" (p.162). Ralston et al., (2009) write that training too early ahead of the go live date can have negative impact on learning motivation and staff may forget what they have learned. They suggest that training should be conducted close to ILMS go-live date, and where the go live date is shifted forward, training is to be conducted again and to "allow time for practice and working with the system to help training sink in" (Ralston, et al., 2009, p.409). Seeman, (2003, p.16) is of the opinion that, ILMS implementation projects including training should "keep a sane schedule" that is planned realistically. Seeman recognises that at times libraries will not want to pay for the old ILMS contract while moving to the new vendor and may therefore be inclined to rush the process. The advice is "don't rush the process...working too close to a "drop dead" date from your old vendor limits fall back scheduled should something go wrong, especially with the migrated data".

• Consortium related problems included:

"the need to compromise on previous individual standards and work practices and it mainly dealt with differing understandings of what was expected which needed to be sorted out in the early days and also dealt a little with staff from individual libraries clinging to old habits and practices and being reluctant to move positively to the new way of doing things"

- "Being imposed from the top with little consideration for what actually worked and was needed. Of course, always, OUR way of doing things is/was the best most effective and relevant one and it is difficult to overcome that".
- "Understanding the larger consortium system and how it would work together"

- "Getting staff to think about the bigger consortia picture and not just their library branch"
- "Possessing a total lack of prior in-house experience with the particular ILMS implementing meant that our library needed constant access to a helpdesk equivalent. Any consortium needs some level of in-house system-specific knowledge or access to someone else who has this".
- "The other thing was the added layer of training required to ensure adherence to agreed consortium standards and work processes, which would not be an issue in a standalone environment".

"Consideration on how it applies to everyone else, adjustment of policies and procedures to ensure everyone gets the max benefit".

An ILMS migration of a consortium magnitude is a huge undertaking and training is only one aspect of this major project. Firstly libraries that join the consortium have their own ILMS systems which need to be migrated to the new and there may be anxieties over loss of functionality. Secondly, individual libraries of the consortium have their own individual standards and work processes; and moreover, as stated by Halmark & Garcia, (1996) the installation of a new ILMS system in itself can cause feeling of stress and uncertainties that generally arise from change, the magnitude of the project, problems of timing, communication difficulties, and training exigencies. It is no wonder that participants have expressed those issues as stated in the above responses. One of the most important steps in the training process is mental preparation of staff. It is important to keep staff informed right at the planning stages of training. Staff needs to understand why the organizational changes are necessary, and they should be provided with opportunity to have an input at all stages of the training process. By organisation engaging with staff at the member libraries allows for better understanding from staff of their workflow processes. Raston, et al., (1999) and Seeman, (2003) suggests that the organisation should support and encourage staff positively while still being realistic.

5.2. Areas of strength with training

I asked respondents to identify the areas of strength with their training experience, and to describe the strengths that they think are consortium related. The responses to this question fell under three main themes, namely collaborative approach, training quality and quantity, and consortium standards.

• **Collaborative approach:** some participants felt that training helped to bring the staff within the consortium together to share common experiences. Being able to come together with other consortium library staff members and share information on how each library group would use the system is strength.

"The strengths lie in the collaborative approach and continuous improvement on how to do things... have really loved the sharing of ideas".

"Real, experienced people on the ground to draw upon - this is consortia-related".

"Strength - being able to talk to the other consortium library staff and understand how they would use the system".

• **Training quality and quantity:** The consortium purchasing power provided the expected advantage of affordability of a high volume of training that was also of high standard. Consortium ability to tailor training to specific position-related module is seen as strength by participants.

"Allowing us to participate in training modules as a consortium at reduced rates, or apportioned costs, which makes it cheaper overall for on-site and Web based training of new modules as a consortium"

"The difference is in the level of training offered by the vendor was probably better and more broad in the consortium than we could afford by ourselves". • **Consortium standards**: This consortium had member libraries come together to develop consortium-specific rules, procedures, standards and processes. They then had these delivered in policy configuration and training was based on these developed standards. Bringing staff together from across the consortium helped to break down the barriers and resistances as reflected in participants' comments above.

5.3. Discussion:

Collaborative benefits: The intention of this chapter is to bring out discussions that were very relevant to the ILMS training in a public library consortium environment, to look at both strengths and weaknesses. Though public library consortia have their unique characteristics, the responses have identified key points that appear to be relevant to library consortium of any type. Collaborative approach is the main reason for a consortium. Fitzgerald & Savage, (2004, p.27) state that, "The immediate need and use of consortium for public libraries is to increase purchasing power. It would be a mistake, however, to focus only on this aspect, as many noncommercial benefits can be gained from being part of a consortium, such as skill exchange and development, sharing of other resources, and collaborative planning". Respondents have identified many benefits with the training in the consortium environment, one of these being that the consortium had experienced staff on ground across the entire consortium that they could draw on. The benefits of a consortium sharing expertise of members are discussed by a number of authors including Parnell, (2003); Fitzgerald & Savage (2004) and Kochtanek & Matthews, (2002). Lowe & Feighan, (1999, p.1) argues that while there are benefits for establishing a consortium including benefits associate with "shared knowledge, skills and experiences among libraries, it can also take up lots of time and effort and still not deliver the outcome that the majority of library members find helpful or satisfactory".

Resentment issues were express by one respondent who felt that decisions from the top were being imposed with no consideration to what actually works for their library. The respondent also acknowledged that it was difficult to let go of what they were used to. This is an interesting point that is also discussed by Lowe & Feighan (1999, p.1) who advised that, for a library consortium to be effective, they needs to be truly representative of the consortium and the consortium needs to remain unified in its goals and direction. It is worth noting too that some participants commented that by bringing staff together from across the consortium to train together, and to share individual library standards and practices, it helped to break down some of barriers and resistances and resentments.

Individual library members' requirement: Members of the consortium can often have different training requirements that are not always obvious. Member representation in the planning and delivery of the ILMS implementation training is essential. Communication and transparency are vital for a successful outcome. This important aspect of training effectiveness is examined further in chapter 6.

Chapter 6

Strategies for effective implementation of ILMS staff training

This chapter looks at the strategies that the consortia adapted to implement an effective ILMS training; thus it addresses the research question 'what strategies are effective for implementation of ILMS staff training in public library consortia?'

Effective training is a result of careful planning which includes identification and gathering of training requirements at the early stage in the ILMS implementation project. Apart from the planning aspects, there are other factors that determine success in implementation of training.

Effectiveness of ILMS training is largely also based on the training methods used and the suitability of these modules to the varying staff jobs, competencies and skills. Due to the complexities of ILMS, Cohn et al., (2001, p.127) suggest having staff attend the right training. It is important to have flexibility in the training models offered. Dashe & Thomson, (2009) suggest that an audience analysis will help in recognising how different staff members will benefit from different training delivery mechanism.

Level of staff involvement in the training planning is discussed comprehensively by Hallmark & Garcia (2003); Dashe & Thomson, (2009); Cohn et al., (2001); Commings, (1991).

6.1. Training planning factor

Some of the elements of planning also surfaced in the previous chapters. It is important that when public library consortia undertake training project, attention is given to planning especially in the areas of scheduling the training, selecting the right people to get trained, and the right staff to be trained by the vendor as trainers. It is also important to set up training facilities with appropriate hardware and software.

While my research did not explicitly ask participants about the planning aspect of the training project, I asked participants to describe strategies that were used to ensure the success of training. Answers to this question reflected on good planning. Respondents felt that all scheduled dates and tasks occurred as planned and that the right trainers were selected.

Consortium manger responded is that:

"From my experience, we did not have any problems during the training programs. This was largely due to the fact that the training was well planned."

6.2. Method of training

Aguinis & Kraiger (2009, p.453) suggest that training effectiveness varies "depending on the training delivery method and the skill or task being trained. They were however not conclusive on exactly why a particular method of training is more effective than others for specific skills and tasks. Haley, (2008, p.34) adds that:

To increase training participation and efficacy, libraries need to determine employees' preferences for online training or traditional face-to-face training; a resulting high training participation rate would increase the competence of all employees. Library trainers and administrators can encourage nonparticipants to attend training by offering different training sessions (online or face-to-face), and/or by changing training policies and budget allocations

Schultz-Jones, (2006, p.160) states that "The value of receiving training directly from the vendor cannot be overstated. Providing the opportunity to interact with the vendor and receive as much training as possible is invaluable". To ensure that training needs are met, Schultz-Jones further suggests that the requirement specified in a Request for Proposal (RFP) should include:

- Vendor must list the number of training days proposed, by type of training course (e.g. staff, administrative).
- Vendor must provide live, on-site training sessions (or specify that computer-based training or training videos are acceptable).

- The library must have the option of videotaping training sessions for future library staff training purposes.
- Vendor must provide a brief description of training courses, including training course location option(s), e.g. at the library, Web-based, video.
- Vendor must include a description of the complete documentation package available with the system.
- The cost of one set of complete documentation on all hardware devices, if purchased from Vendor, and all system and application software modules must be included in the Vendor's proposal.
- Documentation updates provided for all appropriate manuals on a regular basis as additional capabilities, enhancements, or improvements are made to the system.
- Vendor must make documentation updates and release notes available for local printing or downloading via the Web. (Schultz-Jones, 2006, p.160).

In this study, I asked participants from different staff roles to explain what they consider were the main strengths and weakness with each method of training used.

Key themes that immerged relating to strengths for Vendor onsite (face-to-face training included:

• Quality of training: – modules were conducted by experienced staff members who had product knowledge.

"Onsite was useful for initial knowledge delivery and one to one relationship as well as seeing information delivered in a local environment."

"The modules were constructed in a logical manner whereby specific subjects were grouped together into logical units."

Haley, (2008) found that staff was more comfortable with training they received from the Vendor face-to-face

• Interactive factor: – There were responses that indicated ample of time was made available for interaction between the trainers and the staff being trained. The vendor training also enables staff from different library organisations to come together, to see the system with other library staff and discuss how it would work as consortium.

"Built shared knowledge and competence and also a sense of being in it together and identified those who could assist once formal training was completed".

"Strengths, being able to see the system with other library staff and have discussion about how it would work as a consortium".

• **Timing of the training** that was included in the schedule for the project; and the details of the training that targeted the right staff member appears appearing to some respondents.

"Timing of the training, detail of training to the right staff member".

With regards to the weakness of vendor onsite (face-to-face) training, the key themes identified included:

• A lack of hard copy training material – the majority of training documentation was provided by ILMS vendor online. The Consortium manager felt that at times it was not convenient to receive online copies of training material.

"About the only downside to the training was a lack of hard copy training material – the majority was provided in an online version. At times it was not always convenient to receive the material in this form".

• **Time table:** One participant expressed some timing issues with the training sessions:

"Disadvantage was the adherence to timetable meant some gaps and areas needing greater time were glossed over".

• **Training on Vendor's in-house system:** One respondent expressed dissatisfaction with training on databases that did not reflects properly the consortium setup:

"Weaknesses, not having the database reflect properly the set up for the consortium, including a test database of multiple libraries etc."

• Vendor Internet (WebEx): The main strength of vendor internet training appears to be with its convenience:

"WebEx was great for delivering specialised training without the need to travel and gave a close to personal experience".

"...being a rural service we have relied heavily on being able to have training/meetings in this way".

• Connectivity issues and other technology glitches were some of the weaknesses identified. Another weakness expressed was that WebEx is more suitable for shorter courses and that WebEx training is sometimes a hit or miss as it does not provide hands-on and therefore a disadvantage to the "visual" or "doing" learners".

In describing the strengths of In-house training, respondents found in-house training effective because competent and enthusiastic trainers were recruited, expert module trainers were always available to provide mentoring. Though one respondent felt that:

"Sometimes training lags behind because of work pressures and timetabling issues means the training is postponed or not followed up on".

6.3. Discussion

So what method is best suited for training delivery in this library type? The responses indicated that the ILMS implementation training was largely conducted by ILMS vendor either on-site or online via WebEx. Though I am aware that self-paced training was included in the vendor

training package, there is no mention of its use by participants in the responses. ILMS vendors like SirsiDynix provide self-paced (tutorial) learning system "On-Demand E-Learning" usually inclusive in the implementation training package or with annual subscription. Library managers can then create training programs to suit individuals or staff roles. Staff can then log into the online training system and take training at their own convenience. Library managers can manage the staff training progress through this online system (Sirsidynix.com, n.p.). There is no time restriction but the structure of the content is more restrictive and this training has no interaction between the trainer and the trainee.

Hallmark & Garcia, (1996, p.161) suggest staff should use the Vendor's computer-based [self-paced] tutorial for pre-training so that they could get familiar with the basics before training. "Training from a position of ignorance wastes a lot of time. It's like someone explaining the pieces of a jigsaw puzzle; until you work with it, it doesn't make any sense" (p.161). Some vendors request that customers should take at least the introductory "Essential skills training" type tutorial from the online self-paced training system as a pre-requisite to attending vendors' instructor led training.

Respondents also commented positively on the training workshops provided by the consortium where competent trainers were recruited and enthusiastic staff was asked to participate. There were also staff champions in branches who were available to help staff understand the system. There were also additional layers of training required to ensure adherence to agreed consortium standards and work processes.

It is not surprising to see that most participants expressed their views of vendor onsite training positively. Haley, (2008) survey sought out the relationship between face-to-face training and online training. Before doing the survey, the researcher had expected that the more educated staff members would prefer online training and the less educated would prefer face-to-face training. The research found this assumption to be wrong. The other hypothesis made in the study was that online training will be favourable over face-to-face training for its cost effectiveness. This was also found to be false. What the research found was that, the choice of online training was mostly associated with convenience. The research found that, "library staff preferred traditional face-to-face training and opposed to online training" (p.137). The study also showed a high

percentage of respondents who felt that online training was "more effective" if offered by ILMS vendor.

These other important points were presented in my study findings:

Vendor onsite training: The organisation in my case study employed the ILMS vendor to offer onsite training of major library modules to a large number of staff, including those trained as 'trainers'. The trainers were then responsible for training the reminder of staff in their libraries. As discussed earlier, Vendor face-to-face training is seen to have many advantages. However, its costs can be prohibitive to some libraries and therefore its focus is usually on "train-the-trainer". In the literature review section of this study highlighted a number of library literature that discussed the economic benefits to libraries that join together for a shared ILMS system. Marshall, (2004, p.42) explained that though the overall ILMS implementation is a large "capital investment" the cost per individual libraries are much lower than if they operate on their own: "...overhead involved in a single central system can be significantly less than the offsetting costs involved in maintaining multiple independent systems". (p.42). One participant in my study identified one of the benefits of their consortium membership as:

"Allowing us to participate in training modules as a consortium at reduced rates, or apportioned costs, which makes it cheaper overall..."

A lack of hard copy training material: Another aspect that is apparent in my study findings is the issue of lack of hard copy training material. Most vendors provide comprehensive training documents online and make these easily accessible on their customer support websites. It becomes the responsibility of the customer organisation to either download these documents to their networks for easy access to their staff or to provide the website connection details to staff. Hallmark & Garcia, (1996, p.161) suggest that in order for training documentation to be truly useful, the documents "have to be clear, thorough and well-organised, otherwise" staff will not use them. Also training should cover teaching users how to use training manuals, and that libraries should revise training guides provided by vendors and create handouts that could then be used in training. For effectiveness of training, Ralston et al., (2009) also suggest libraries to create guided hands-on training steps that trainees can follow when the trainer is demonstrating. **Training on Vendor's in-house system**: One participant was disappointed that the Vendor's database used in training did not reflect properly and set up for the consortium. Ralston et al., (2009); Epple & Warwick, (1992) suggest training should be conducted on a database containing the library's own data where library policies are represented. Epstein, (1990, p.92.) recommends that a training system should contain "samples of the library's data and the parameters and indexing options chosen by the library. It should mirror the library's "live" [database] in every respect".

The standard process from some ILMS vendors is that a test data migration is implemented before training starts. Training is then conducted on the test system with library data and policy configuration. Time is allowed in the contract for library to train their staff as well as conduct the data testing on the test system. Dashe & Thomson, (2009, p.11) argue in favour of using a real training system rather than vendors 'sandbox':

When you learned to drive a car, think how it would have felt to take a driver's education course, spend a few hours in a simulator, pass your written test, wait six weeks, then get behind the wheel of a real car all by yourself. It would be scary, for you and everyone else on the road.

The shortcoming of this arrangement from my experience as an ILMS trainer is that training can be heavily interrupted with staff focusing attention on their data and asking questions about migrated data rather than paying attention to the training itself. Another consideration from some vendor trainer's point of view is that when training on customer data it is difficult to know what examples are there to use, what their workflows are, to mention a few. So the trainer may be flying blind; but the trainees expect that the trainer should know every policy and workflow of their system. This just isn't possible or efficient as the time spent on researching and getting familiar with their system is almost more than the time spent training. Training with Vendor's system data and from a generic mind set not only creates a smooth training experience, but it also forces customers to think outside the box often opening their eyes to new workflow processes.

Another factor is that, it is not realistic to train customers initially on their production system as the training needs to be completed before the go-live. However, production systems are usually ready just in time for go-live. Moreover, some libraries want to receive training as soon as contract is signed so that they will have plenty of time to learn and practice the new system. Such training can only happen on the vendor's in-house system. In case of the consortium in my study, one of the respondents reported that initially:

"A specific training database was established by the vendor so that staff could conduct refresher training under their own supervision should they require additional practice using the new ILMS. This proved to be very beneficial and was welcomed by library staff".

Timetabling issues: This appears to be one of the issues encountered with in-house training. Halmark & Garcia, (1999, p.162) suggests that "new software platforms are sophisticated and complex, and users need adequate time to learn. Training days should be spaced with intervening time to practice using the system, as otherwise there is too much to absorb". A more literature review has identified the important to develop a training schedule for all trainees. Consortium should setup a team comprising its members from library groups to discuss work and training schedules, including other aspects of the training. This is confirmed by Dashe & Thomson, (2009, p.13):

At least one training team member to coordinate training administration and logistics, and work closely with training developers on development timelines, classroom system requirements, and course descriptions and timing. Depending on the extent of your training program, consider building in contingency funds for additional temporary staff to keep up with user registrations during the critical training period, or for outsourcing printing and shipping tasks.

Epstein, (1990, p.90) recommends to provide scheduling that allows staff to participate fully in training without feeling that they are "ignoring the 'important' work while training or practicing". Temporary staff should be used as often as needed to supplement certain tasks while staff is being trained. From some of the responses, it appears that Library managers were responsible for overseeing the training implementation in their libraries and one of the Library managers said that they had some contingency in place that resolved any timetabling issues.

"Replacement staff was available so branch staff could participate in the training when needed".

Overall quality of training: Consortium manager reported that, all of the "train the trainer" training was conducted by the vendor who was 100% responsible for conducting the training in accordance with the agreed program. Once the "train the trainers' had received their training, they were then responsible for training the rest of the staff in their particular library. The library trainers' performance was not only monitored by the relevant Library managers but their performance was also reviewed from time to time by a training officer supplied by the vendor.

6.4. Staff involvement

Commings, (1991) discusses the benefits of involving staff in the automation process and recommends that the involvement of staff should be a major goal of any ongoing training process. In line with this suggestion, I asked Library managers to specify how staff members from different library groups in the consortium were involved in the planning for ILMS training. The theme responses were that:

"Competent trainers were recruited and enthusiastic staff members were asked to participate in the train the trainer training".

"Targeted staff from other libraries were involved in the overall consortium training. This group of staff that undertook training from the Vendor and these were then empowered to implement training programs within their own library service. The group were able to determine the training, but were guided mainly by the vendor".

6.5. Discussion

Staff selection for training: It is evident from the responses received that staff involved with training the ILMS was carefully considered. Epstein, (1990) and Ralston et al., (2009) share the view that for the vendor's 'train the trainer' to be successful, it is important for library to select the right staff with ability to teach, to learn and enthusiasm for the training. Good trainer should be selected rather than just select a person to attend training just because they are a 'supervisor'.

There is clear indication from participants that competent staff were selected for the "train the trainer" training and that there was also a backup support of "*Staff champions in branches that were available to help staff understand the system*". It is also clear that there were senior team members involved in selecting the right consortium staff responsible for receiving the "train the trainer" ILMS training modules; and for training the reminder of staff in their libraries. This is in accordance with Hallmark & Garcia, (1996, p.163) who state that:

Pick in-house trainers carefully: Choose a popular person who is smart and an excellent communicator; don't opt automatically for computer folks. According to one vendor, "Computer whizzes will not wait for the trainer; they are impatient and go off on their own. We look at their CRT and wonder how in the world they got where they are!" Occasionally librarian trainers will not really want to disseminate information, but hold onto it to protect and enhance their own turf.

Library system Administrators Involvement: Participants commented that Library systems staff was involved in the training. However, the responses were not specific if the library system administrators were present in all training sessions. Epstein, (1990, p.92) suggests that at least one person partakes in all the training so that they can have an understanding of all aspect of the training. Knowledge gained in training is essential for the administration of the ILMS system including dealing with any system configuration issues that may require their attention. In a consortium environment one would presume that each library group will have their own system administrator. Frequently, the system administrators are also involved with other aspects of the ILMS implementation project as well as on-going technical support while training is taking place. It can therefore be difficult for the administrators to be present in all training session. Hallmark & Garcia, (1996, p.160) advise that "No additional responsibilities should be assigned to the system administrator to become trained on all modules". My study did not seek to clearly ascertain the involvement of the Library administrators in the training however these statements were made by some participants:

"Library systems staff were consulted and involved in drawing up plan details".

"This library job-shared its Systems Librarian with another partner library to supplement their skill base in the project. Ongoing technical support was made available throughout the life of the project - well into post-implementation phase".

Level staff of involvement: One of the guidelines for ILMS training as outlined by Cohn et al., (2001, p.130) is that organisations should involve staff members at all levels in planning activities for the training. In a consortium environment with more complex needs, and a large number of staff to be trained from different library groups, my study wanted to explore the level of staff involvement. My intention was to compare the answers from Consortium manager with Library managers. My expectation was that the Consortium manager would state how they involved the library managers in the training planning and training processes; and for the Library manager sto state how they in turn involved their staff. The response I got from the Consortium manager showed that he was responsible for the overall planning and coordination of the ILMS implementation project including its training.

"My role was that of Project Manager, so my main activity was to ensure that all scheduled dates and tasks occurred as planned".

Although the Consortium manager did not state explicitly, data analysis show that he worked closely with the Library managers of member libraries in determining which staff will be responsible as trainers.

"My involvement was in determining which staff would be responsible for conducting the "train the trainer" programs in their libraries. These staff were then responsible for training the remainder of staff in their library"

Library managers said that they involved their staff by keeping staff informed in meetings and staffs was encouraged to ask for information. They also involved staff through communication from various steering groups as well as sharing information via email lists and on the consortium websites. Here is what some participants said: "There were a number of joint meetings of subject/element-specific subcommittees involving staff from member libraries to develop standards and work processes which were then documented and incorporated into a manual which formed the basis of the inhouse training specific to these tasks. There was also input into the general training timelines for across-the-board training which was delivered under the auspices of the vendor. Staff was also involved in reporting gaps in knowledge and seeking training in the addressing of this"

"Weekly in-house meetings; across-libraries phone hook-ups; regular steering group communications".

"User group, small work groups and sharing of information via email list and consortium website".

Motivational factor: Training involves impacting a change in a person. "Training is about motivating a learner to believe in and buy-in to knowledge" just as it is with marketing (Gerding, (2007, p.86). The staff motivation is therefore a critical determinant of training effectiveness. Tannenbaum & Yukl, (1992) suggest that trainees who come to training with high levels of motivation learn more, perform well in training as compared to those with low levels of motivation. Much literature discusses in depth the psychology of motivation but that is beyond the scope of this study. This study has not explored deeply with participants on the motivational factor of the training implementation. Though this was on my mind when I asked participants to explain what specific strategies they used to keep staff at all levels informed and supported in the ILMS migration project and training. Key themes from the Library managers were mainly that:

- They communicated regularly with all staff via a newsletter and Q& A sessions.
- Regular updates at staff meetings.
- Specific meetings about migration issues as well as a local implementation committee who worked closely with the consortium partner, the staff and the vendor and their trainers.

- Refresher training for those who required it as well as debriefing sessions and evaluation sessions after implementation.
- Staff champions in branches that were available to help staff understand the system.

Seeman, (2003) advises that communication is critical to staff morale. When a library joins a consortium, and goes through re-learning the consortium new ways of doing things as well as learning the new ILMS system, it can create enormous anxieties as staff navigates through the changes in their work lives. Seeman, (2003, p.17) recommends that staff need to "receive information, express their concerns, and have those concerns addressed". Staff also needs to be able to see clearly how the new system will take care of their work processes and any changes to workflows need to be managed with consideration. Esptein, (1990) encourages organisations to re-assure and encourage staff members as they learn the new ILMS system. Staff should be able "to speak freely and question all the nuts and bolts of the system operation" (p.17). It is important that training should be conducted to meet trainees' expectations and the training outcome should be fulfilling, so that the outcome is positive.

It is clear from the responses that the consortium had good communication in place, a hot line was made available for staff to call in for information; regular updates at staff meetings. Staff was also kept informed via a newsletter, via email lists and information was also available on the consortium website. Also, there was refresher training for those who required it as well as debriefing sessions and evaluation sessions after implementation. It is refreshing to also see that the competent and enthusiastic trainers were available to offer further training to those who needed it. And staff champions in branches were available to assist staff to develop further learning and confidence with the new system.

6.6. Training Evaluation

I asked participants how training was evaluated for effectiveness. Here are the key responses:

"A program was established that recorded all training undertaken by each member of staff. If more than 15% of staff had to use the training database on more than 4 occasions in order to obtain a working knowledge of the particular module in question, then it was deemed that that particular training was ineffective. Accordingly, if such a situation arose, the module would be retaught. Throughout the whole training of more than 500 staff, I am only aware of one instance where this occurred".

"Feedback from managers and trainers".

"Evaluation was done via formal feedback of training as well as review of staff capability after training delivery and is built into individual staff training plans and performance sessions".

"On the job, gauging how people were providing customer service via the lms [ILMS]".

6.7. Discussion

The reasons for evaluating training are to examine the desired outcomes that were stated in the training goals and objectives. Evaluations can be done in different ways and could include an evaluation of both the trainer and trainees or just the trainer or just the trainees. Gerding, (2007, p.127) lists six major reasons for evaluating training:

- Improving the quality of the training (trainer)
- Promoting individual growth through self-evaluation (trainer and trainee)
- Assessing demonstrated achievement; changes in skills, knowledge, behaviour (trainee).
- Determining future learning needs (trainer and trainee)
- Enhancing personal sense of satisfaction and worth (trainer and trainee)
- Proving whether the service of value (trainer and participant, and especially the library)

It appears that in my case study, the consortium used evaluation to demonstrate the relevant skills and knowledge staff had acquired to enable them use the new ILS system to perform required duties effectively and efficiently. This is in line with the desired outcome stated in the goals and objectives of the training.

Conclusions and Limitations

7.1. Conclusion

When I stated this study, I had self-reflected on what it means to implement ILMS training in a public library consortium successfully. I was especially interested in a public library consortium because of my involvement with their ILMS implementation and training. I anticipated that training in this library type will have some similarities but also some differences when compared to a single public library system. This study found many similarities of implementing ILMS training in single public library networks but it also identified areas of ILMS implementation training relevant to public library consortia. When public libraries join in a consortium and share ILMS, they usually still operate the shared ILMS with some individual library groups' policies and rules. Having varying individual trainee needs and skills in training can be hard to manage; and having to also deal with the individual library varying needs is even a bigger challenge to the vendor trainer. I have learned from this study that as a trainer, knowing these dynamics prior to training and not while in training will provide a more positive training outcome. In my case study, at the initial stage in the implementation project, the consortium's member libraries came together to develop consortium-specific rules, procedures, standards and processes; they then had these delivered in policy configuration and training was based on these developed standards. Where the consortium expects the vendor training to incorporate the "consortium-specific" standards, then these should be communicated clearly to the trainer ahead of training.

An individual library group approach where trainees from the same library group are trained together is effective in that the training targets the library group's specific requirement and therefore discussions are more specifically focused on local policies and procedures. While as trainer, I thought that this is a more effective approach, I have learned from this study that, the mix group approach where library staff from different library groups is trained together has some

vital benefits. When staff comes together from across the consortium to train together, they have opportunity to share and learn from each other's library standards and practices; and this provides opportunity to see areas where processes can be adjusted to take full advantage of the new system. The mix group approach also helps to break down some of the barriers and resistances and resentments. It also provides opportunity for the library trainers to learn from each other the dynamics of the groups.

In the initial planning stages of the implementation training, it is important for consortium to evaluate the training needs of the members, the dynamics of how they will use the new systems, and to communicate these needs to the trainer prior to training.

This study sought to address the research question: what factors influence effectiveness of ILMS staff training in public library consortia? In addressing this question, the study has found the key components of an effective implementation of ILMS training in a consortium:

There is a need to compromise on previous individual library members standards and work practices. The library consortium needs to deal with different understandings and expectations of the individual libraries. The early stage of training planning should anticipate situations where staff from individual libraries clings to old habits and practices and may therefore be reluctant to move positively to learning the new ways of doing things. Strategies should be put in place to proactively deal with issues that may result to negative feelings.

It is vital that the consortium should bring libraries together to discuss and arrive at a compromise on how the ILMS will be applied to every member library and adjustment of policies and procedures to ensure everyone gets the maximum benefit of the new ILMS. Involve staff from member libraries to develop standards and work processes which should then be documented and incorporated into a manual. The manual should then form the basis of the inhouse training is conducted specific to those tasks.

Library group members should have an input into the general training timelines for across-theboard training which is delivered by vendor. Library system administrators should be consulted and involved in the training plans. They should also be involved in all training sessions including training and discussions on the consortium standards. The consortium members will rely on on-going technical, configuration and functionality support of the ILMS. It is therefore important that the Library system administrators are conversant with all ILMS operations as well as having a good knowledge of the library consortium, including knowledge of the groups' dynamics.

Training modules: Because of a large number of staff to be trained, it is important that a training committee involving staff from member libraries is set up to overseas the training. In my case study, the consortium Library managers were responsible for overseeing that every staff member in their library was on board; they ensured that the right training was offered to the right staff and also that the objectives for the training were achieved. While the vendor onsite 'train the trainer' training is recommended for a consortium, an integrated training module of face-to-face, web based training and self-paced training should also be provided to allow flexibilities with the training for member libraries. Only competent staff and enthusiastic staff should be involved with the in-house training.

On-going staff support for the ILMS training in a consortium is very important. Staff should be kept informed of happenings and encouraged to ask for assistance with learning.

7.2. Limitations

This study is conducted anonymously which means that I had no direct access to participants. Only Consortium manager was known to the researcher. I therefore had to rely on the Consortium manager to forward the survey link to participants. When I needed some clarification from some participants, I did not know who the participants are and therefore that provided some limitation.

I expected 10 responses from this survey. One from Consortium manager; five from Library managers; and another five from Library trainers. I received 5 in total. One from Consortium manager, 4 from library managers. My aim was to see if differentiating responses showed for the

different staff role that I surveyed. I found that I was limited by not receiving any responses from the Library trainers.

7.3. Suggestions for future research

While examining ILMS training effectiveness in public library consortia, this study concentrated on training strategies from one organisation and from their management of training. The study does not look into the details of training techniques from the vendor trainers' point of view. Thus, I did not seek the opinions of vendor trainers or the opinions of trainees. The size, and level of original contribution to this research, is much smaller than if it were a full Masters or PhD thesis. This study therefore only specifically looks at the key areas that the consortium could implement effective training. Future research that incorporates these suggested key points will provide more balanced findings:

- **Tools and techniques** that are adopted by vendor trainers for conducting effective training in public library consortia environment. These areas of research could focus on trainer's experience. My study did not interview vendor trainers, and it did not seek the opinion of trainer's techniques and training process.
- **Trainees.** My study did not involve trainee's opinions and consideration when examining strategies for the effectives of the ILMS training within a consortium. A future study that involves also the trainees should provide more balanced findings.
- **On-going training:** After the initial implementation of ILMS training in a consortium (the focus of my study) it is useful for library consortia to provide ongoing refresher training sessions as suggested by (Ralston et al., 1999). A future research should also study strategies that public library consortia adopt for their staff development.
- **Training the public user**. Training the public on the use on the new library software in the consortium is very important as the users also need to know how the ILMS fits into and interacts with the internet technology including the social networks and the social

media. Users of the library need to understand how to use the next generation catalogue; they need to understand the public relations and services in the context of the consortium and its ILMS. According to Cohn et al., (2001), such training can:

- Make users aware of your new system and services,
- Motivate the public to use the system, and
- Teach them to use the new system and services effectively.

It is desirable to have future research that examines strategies for implementing training of ILMS and their corresponding technologies such as those associated with the social catalogue to the consortium public users.

• A comparative study: A study of the public library consortia ILMS training that compares and contrasts the practices of more than one consortium will provide a more balanced, interesting and informative findings.

It will take a bigger research than this dissertation to fully examine, understand and answer the question: What factors influence effectiveness of ILMS staff training in public library consortia? However, it is hoped that my study has contributed to the Library and Information Science (LIS) body of knowledge.

APPENDIX A: Survey Questions – Staff roles

- 1. Which of these roles mostly apply to you?
 - Library manager
 - Library trainer
 - Both Library manager and Library trainer
 - Library Consortium manager

(Depending on which staff role is selected, the following survey questions are prompted. Questions that are 'strikethrough' did not show).

Appendix B: Survey Questions – Library manager

- **1.** Please state the goals and objectives of the consortium for staff training to implement Integrated Library Management Systems (ILMS) for your library.
- **2.** Explain what role you played in ensuring that the ILMS training achieved the goals and objectives as set by your library consortium.
- **3.** In what specific ways were staffs from different member libraries in the consortium involved in the planning for ILMS training?
- **4.** What training modules were offered, i.e. Vendor on-site, Vendor internet base, Vendor self-paced training, in-house training, etc.?
- **5.** Explain what you consider were the main strengths and weaknesses of each training modules offered.
- **6.** What specific strategies did you use to keep your staff at all levels informed, and supported in the ILMS migration project and training.
- 7. What strategies were used to ensure the success of the training?
- 8. How was the training evaluated for effectiveness?
- 9. What specific form of support were trainers and trainees given?

- **10.** Please list any problems that you and your library staff experienced with training. State the problems that you think are consortium related.
- **11.** Please list any problems that you experienced with training. State the problems that you think are consortium related
- **12.** Please identify the areas of strength with the training experience. State the strengths that you think are consortium related.
- **13.** Please describe any other experience that you and your library have had with ILMS training in a consortium environment that you think might be useful to this research
- **14.** Please describe what you think makes the ILMS training in this consortium environment different from that which you experienced when you were not part of the consortium.
- **15.** Explain the support and training you were given by your organisation to enable you run training for the library systems adequately.
- **16.** Please state what problems the consortium had with the training.
- **17.** Explain the support your consortium was given to enable you run training for the consortium adequately. For example, what support did you receive from the ILMS vendor?
- **18.** Please describe any other experience that your consortium had with ILMS training that you think might be useful to this research.

Appendix C: Survey Questions – Library trainer

- **1.** Please state the goals and objectives of the consortium for staff training to implement Integrated Library Management Systems (ILMS) for your library.
- **2.** Explain what role you played in ensuring that the ILMS training achieved the goals and objectives as set by your library consortium.
- **3.** In what specific ways were staffs from different member libraries in the consortium involved in the planning for ILMS training?
- **4.** What training modules were offered, i.e. Vendor on-site, Vendor internet base, Vendor self-paced training, in-house training, etc.?
- **5.** Explain what you consider were the main strengths and weaknesses of each training modules offered.
- 6. What specific strategies did you use to keep your staff at all levels informed, and supported in the ILMS migration project and training.
- 7. What strategies were used to ensure the success of the training?
- 8. How was the training evaluated for effectiveness?
- 9. What specific form of support were trainers and trainees given?
- **10.** Please list any problems that you and your library staff experienced with training. State the problems that you think are consortium related.
- **11.** Please list any problems that you experienced with training. State the problems that you think are consortium related
- **12.** Please identify the areas of strength with the training experience. State the strengths that you think are consortium related.
- **13.** Please describe any other experience that you and your library have had with ILMS training in a consortium environment that you think might be useful to this research
- **14.** Please describe what you think makes the ILMS training in this consortium environment different from that which you experienced when you were not part of the consortium.
- **15.** Explain the support and training you were given by your organisation to enable you run training for the library systems adequately.
- **16.** Please state what problems the consortium had with the training.

- **17.** Explain the support your consortium was given to enable you run training for the consortium adequately. For example, what support did you receive from the ILMS vendor?
- **18.** Please describe any other experience that your consortium had with ILMS training that you think might be useful to this research.

Appendix D: Survey Questions - Both Library manager and Library trainer

- **1.** Please state the goals and objectives of the consortium for staff training to implement Integrated Library Management Systems (ILMS) for your library.
- **2.** Explain what role you played in ensuring that the ILMS training achieved the goals and objectives as set by your library consortium.
- **3.** In what specific ways were staffs from different member libraries in the consortium involved in the planning for ILMS training?
- **4.** What training modules were offered, i.e. Vendor on-site, Vendor internet base, Vendor self-paced training, in-house training, etc.?
- **5.** Explain what you consider were the main strengths and weaknesses of each training modules offered.
- **6.** What specific strategies did you use to keep your staff at all levels informed, and supported in the ILMS migration project and training.
- 7. What strategies were used to ensure the success of the training?
- 8. How was the training evaluated for effectiveness?
- 9. What specific form of support were trainers and trainees given?
- 10. Please list any problems that you and your library staff experienced with training. State the problems that you think are consortium related.
- **11.** Please list any problems that you experienced with training. State the problems that you think are consortium related
- **12.** Please identify the areas of strength with the training experience. State the strengths that you think are consortium related.
- **13.** Please describe any other experience that you and your library have had with ILMS training in a consortium environment that you think might be useful to this research
- **14.** Please describe what you think makes the ILMS training in this consortium environment different from that which you experienced when you were not part of the consortium.
- **15.** Explain the support and training you were given by your organisation to enable you run training for the library systems adequately.
- 16. Please state what problems the consortium had with the training.

- 17. Explain the support your consortium was given to enable you run training for the consortium adequately. For example, what support did you receive from the ILMS vendor?
- **18.** Please describe any other experience that your consortium had with ILMS training that you think might be useful to this research.

Appendix E: Survey Questions – Library Consortium manager

- **1.** Please state the goals and objectives of the consortium for staff training to implement Integrated Library Management Systems (ILMS) for your library.
- **2.** Explain what role you played in ensuring that the ILMS training achieved the goals and objectives as set by your library consortium.
- **3.** In what specific ways were staffs from different member libraries in the consortium involved in the planning for ILMS training?
- **4.** What training modules were offered, i.e. Vendor on-site, Vendor internet base, Vendor self-paced training, in-house training, etc.?
- **5.** Explain what you consider were the main strengths and weaknesses of each training modules offered.
- **6.** What specific strategies did you use to keep your staff at all levels informed, and supported in the ILMS migration project and training.
- 7. What strategies were used to ensure the success of the training?
- 8. How was the training evaluated for effectiveness?
- 9. What specific form of support were trainers and trainees given?
- **10.** Please list any problems that you and your library staff experienced with training. State the problems that you think are consortium related.
- **11.** Please list any problems that you experienced with training. State the problems that you think are consortium related
- **12.** Please identify the areas of strength with the training experience. State the strengths that you think are consortium related.
- **13.** Please describe any other experience that you and your library have had with ILMS training in a consortium environment that you think might be useful to this research
- **14.** Please describe what you think makes the ILMS training in this consortium environment different from that which you experienced when you were not part of the consortium.
- **15.** Explain the support and training you were given by your organisation to enable you run training for the library systems adequately.
- **16.** Please state what problems the consortium had with the training.

- **17.** Explain the support your consortium was given to enable you run training for the consortium adequately. For example, what support did you receive from the ILMS vendor?
- **18.** Please describe any other experience that your consortium had with ILMS training that you think might be useful to this research.

APPENDIX F – Information Sheet for Participants.

Implementing a new integrated library management system in a public library consortium: a case study on strategies for effective staff training.

This research has obtained Human Ethics approval from Victoria University.

I am a Masters student in Information Studies at Victoria University of Wellington. As part of this degree I am undertaking a research project.

My project seeks to investigate the experience of public library consortia that have been through the Integrated Library Management Systems (ILMS) implementation process with a view to understanding the strategies they adapt to implement effective ILMS training.

My preliminary investigation of the topic shows that there is not much literature on ILMS training in public library consortia. This research therefore aims to investigate this topic and offer insights to better understand factors and potential strategies that make ILMS training in public library consortia effective.

By identifying and sharing experiences and views of public library consortia, this research seeks to identify strategies that will assist with effective ILMS training. Findings from this research could also enable ILMS vendors explore approaches to provide more effective training in public library consortia environment.

I have obtained consent from your organisation to undertake this study.

I would like to invite you to participate by responding to the questions in this this online survey.

I do not intend to identify your organisation in the case study. Also, you as an individual participant will not be identified personally.

At the end of the study and after completion of the examination of the dissertation, I will provide summary of the findings and recommendations of the study to the Consortium manager. I will ask the Consortium manager to forward this summary finding to you and also to notify you that an electronic copy of the study is available on the scholarly commons of the Victoria University of Wellington and you may be able to download the electronic copy of the study if you wish.

I will appreciate if you could please respond to this research questions by the 5th May, 2012.

The project will be submitted for marking to the School of Information Studies and deposited in the University Library. It is intended that one or more articles will be submitted for publication in scholarly journals. Diaries and questionnaires will be destroyed two years after the end of the project.

If you have any questions or would like to receive further information about the project, please contact me at chilerebe@myvuw.ac.nz or my supervisor, Dr Chern Li Liew <u>ChernLi.Liew@vuw.ac.nz</u>.

Your completion of this survey constitutes your consent to participate in the study.

Thanking you for participating in this research.

Rebecca Chile.

APPENDIX G – Additional Information Sheet for Library Consortium manager.

As you are the Consortium manager and some of the questions target the Consortium manager I invite you to also complete the interview questions. Your views will be very rich in informing the study.

As you are the only Library Consortium manager participating in this study; you will be identified whether named or not in the report. There is no way to maintain confidentiality as you can be identified easily.

I have previously sought your consent to attribute any quotes that I provide in the report to you.

I will appreciate if you could please respond to this research questions by the 5th May, 2012.

If you have any questions or would like to receive further information about the project, please contact me at chilerebe@myvuw.ac.nz

or my supervisor,

Dr Chern Li Liew - ChernLi.Liew@vuw.ac.nz

Your completion of this survey constitutes your consent to participate in the study.

Thanking you for participating in this research.

Rebecca Chile.

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