

BUILDING THE BRIDGE AS YOU WALK ON IT: DEVELOPING UBC'S COMMUNITY OF TRAINERS

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The following article describes the building of an in-house community of trainers at the University of British Columbia Library.

Catalyst Event

The University of British Columbia Library's automated library system, developed in-house over the past 30 years, served its users well in many ways. However, as is the case in many academic libraries, changes in technology, user demand and the need for a single, unified system with greater versatility required a move to a new system. DRA was chosen as the new system with four modules to be installed: PAC, circulation, cataloguing, and acquisitions/serials.

The conversion process from the old to the new system was to be fast-tracked, occurring during a brief lull at the beginning of the summer term (April-May 1997), with implementation decisions still to be made as they arose during the process of converting a large catalogue. Solving changes in workflow and developing training strategies would also have to be developed just-in-time and through several iterations. This fast-tracked approach to implementation required an equally flexible training process. The approach taken was to develop a web of support that encouraged lateral communications, innovative curriculum design, teamwork, and risk-taking, while, at the same time, providing structure, safety nets, and removal of administrative and operational barriers. Building the training program in this iterative way for 329 FTE staff required a community of trainers.

The Environment

Concurrent with the conversion to a new automated library system was the physical move to the new "main"/humanities and social sciences library, the restructuring and merging of its public and technical services, and the revival of the Information Services division, which is responsible for user education and generic staff training on OPAC reference/information services. Plans for training on the DRA system evolved from the library's Staff Training and Development (STD) plan and program, which were developed and implemented over five years, as described in detail in *Advances in Library Administration and Organization*, (v. 14, 1996, p. 63-94).

Conduits and Cables

During 1996, all staff received individual e-mail accounts, and a listserv and online suggestion box were created to encourage lateral as well as hierarchical communications. At the same time, the Staff Training and Development Committee programmed a series of seminars on the "softer" communications skills related to managing change and transition, conflict resolution and facilitation roles. Attendance was voluntary, and a majority of staff attended. Information

about planning for DRA implementation was disseminated in regular columns of the staff bulletin, through periodic staff information sessions, and through the distribution by e-mail of management committee meeting minutes.

Building the Scaffolding

UBC Library contracted with ARL's Office of Management Services (ARL/OMS) for five days of its Training Skills Institute (TSI). The UBC-tailored Training Skills Institute, facilitated by Kathryn Deiss and George Soete, was developed for 50 trainers, 25 each in two seminars. These seminars consisted of 12 or 13 experienced trainers from each of the four functional DRA modules. Two-thirds of the participants were library assistants, the remaining third were librarians. The ratio of public to technical services staff was 50:50.

This merged "community of trainers" was to be instrumental in transforming the library staff and library users from a "know-nothing" state to a "know-something" state by using adult education principles that had been learned or reinforced in the TSI sessions. The TSI did at least four things: it brought people together who would not have met in the normal course of events; it introduced a common language for planning training; it provided the opportunity to learn (and share) common skills, such as learning styles and design options; and it provided a forum to develop the initial list of concerns and challenges.

Foundation

The training structure was provided by the Training Task Group (TTG), a sub-group of the DRA Project Implementation Team, with members from all four modules: PAC, circulation, cataloguing, and acquisitions/serials. This team developed the framework for the individual module plans, ensuring training standards; bridging training activities between modules; identifying training gaps; and providing communications, coaching, logistical, and advisory support. The TTG also developed the following assumptions, the foundation for each module's plan:

- The DRA system will evolve. Therefore, the staff training plan and program will also evolve.
- It is possible to get the training done and it is possible to learn the new system building on previous knowledge of information technology.
- Supervisors will permit staff to take training and will need to make adjustments in scheduling while staff members are being trained.
- Formal and informal training is supported.
- The training and learning process is messy, a moving target.
- Adult education principles apply: people learn differently; training and learning are creative processes; and training and learning are never finished.

- Productivity requirements will need to be adjusted to accommodate training and learning.
- It is the responsibility of the library to provide training; it is the responsibility of the staff member to learn.
- Mistakes are to be expected and mistakes are acceptable.

Building the Bridge

With the foundation laid, the scaffolding up, and the vendor and general training framework in place, the community of trainers began its massive curriculum development work. The fifty trainers, augmented by another dozen, split into subgroups to develop the plan for each of the modules.

The first plan to be finished, the PAC module plan, provided a model for other groups to follow or adapt. It addressed the fundamental questions:

- Who needs training?
- Who does the training?
- How?
- When?
- What training gaps are identified?
- What is the content?

As soon as the training plans for each module were drafted, they were posted to the library's DRA web page along with training schedules, information on training materials, a common DRA vocabulary, hot-lines, frequently asked questions and their answers, and updates on implementation deadlines.

Cross-Bracing

Following the TSI seminars, the trainers developed ground rules for working with each other. These included eliminating barriers between public/technical services and professional/library assistant categories through such specific acts as sharing of information and documentation, cross-communications via e-mail, adopting a common language for DRA "talk," and opening pilot sessions and dress rehearsals to each other. Two follow-up meetings to the Training Skills Institute were held to identify and clear roadblocks, to share information and to confirm support by the Training Task Group and library administration. Concerns and challenges identified during these sessions were addressed or referred to the library administration as they emerged.

The overriding concern for the training designers was that their plans were being developed at the same time as DRA implementation decisions were being determined. Specific procedures were incorporated into training scripts only hours or days after implementation decisions were made. Scripts and documentation changed frequently. The bridge was being built as the trainers were crossing it.

Nuts and Bolts

The TG chair's primary role during the design and implementation phases was to be available for troubleshooting, coaching, helping develop plans, reviewing scripts, and matching training needs with appropriate trainers. Assumptions developed by the Training Task Group were reviewed, revised, and repeated as often as needed to allay fears, create breathing space, and draw in support from supervisors.

Trial Runs and Inaugural Day

Implementation day, May 20, 1997, came and went with ribbon-cutting celebrations; shaky first steps; subsequent adjustments; revisions to scripts, schedules and content; and a sense of relief in passing this milestone. It had taken 630 hours of preparation time by over 50 trainers to develop 18 topics/segments leading to 252 scheduled hours of start-up staff training. Assuming an average of 15 participants per session, this translates into 3,780 hours of learning time between April and "day one." Individual and group coaching, problem solving and troubleshooting are not included in these figures. Factors leading to the success in building the community of trainers were:

- the library administration's support for the training approach;
- recruiting a large group of trainers from the beginning;
- developing and adapting new training skills learned at the TSI;
- experience in developing training plans and programs;
- a history of hands-on training sessions in information technology;
- universal access to speedy e-mail communications;
- familiarity with a succession of "change" events, such as the restructuring process;
- adopting a flexible, non-bureaucratic, and non-hierarchical training process; and
- accepting draft versions of documentation.

In addition, trainers and learners demonstrated behaviors typical of emergency situations:

- acceptance of learning on the fly;

- willingness to cross boundaries and clear obstacles;
- seeking support from lateral sources; and
- eagerness to offer helping hands.

Common Ground

The community of trainers continues its bridge building work. Although much of the training in this operational phase of implementation now occurs within functional units, the trainers and learners still maintain contact. They have no option. The new system requires everyone to work from common ground, that is, from a single automated record to which information and value are added as the work flows through the various functions. The common goal, building the information record for our users, reinforces the sense of community.

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