Prepared for:

WLA Continuing Education Committee

Web content strategy and information architecture project

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Stakeholder Analysis

This draft documents the needs and desires of WLA members and other potential learners who may be expected to access continuing education content on WLA.org. This analysis is based on initial discussions with Emily Keller and Kate Laughlin of the Continuing Ed Committee and on a detailed review of responses to a survey conducted in 2011 by the CE Committee in collaboration with the Washington State Libraries (WSL). The survey collected exhaustive information about past experience with instructional resources from about 400 respondents, mainly staff members of libraries throughout Washington. Responses demonstrate some clear sets of learner characteristics and preferences, extensive experience supporting some strong likes and dislikes, and useful emphasis on specific topic areas for which coverage would be helpful to constituents of the CE committee.

Interpretation of survey results will require a flexible approach, because questions appear to have allowed multiple responses. This prevents strict quantitative interpretation, since the number of answers per question can vary significantly, which prevents direct ranking of responses in relation to one another. Some questions provided none-of-above options, so prevalence of that response or the simple absence of a response to a question might be considered as a proxy for direct rankings of low-to-high priorities for specific responses. However, most respondents gave at least some answer for nearly every question, which makes those null cases a poor proxy.

The lack of quantitative analysis does not present major problems, because the survey results provide plenty of information to support rich qualitative analysis of learner needs.

Instructional Topics and Content Strategy

Survey results show interest in a wide range of topics and areas of interest. The outline below attempts to filter out the topics most important to respondents.

1. Library management and advocacy
   a. Marketing and promotion
   b. Stress-management, change management
   c. Conflict resolution & difficult conversations; burnout
   d. Group dynamics & team-building
   e. Supervision, support for NEW supervisors
   f. Human resources and legal issues
   g. Maybe some fund-raising & grant writing
   h. Collaboration with other community services
      i. Schools

      ii.   Community organizations for multi-generational & cross-cultural programming

      iii. Colleges for management & leadership training

2. Patron services
    a. Teen and youth outreach, especially around digital media & e-readers
    b. Difficult-patron training
    c. Information literacy: Source selection and access, copyrights
    d. Medical & Legal issue reference
    e. Adult readers advisory (Can CE events capture some of what people love about Nancy Pearl's sessions?)
    f. Job hunting and skills training, resume brush-ups
    g. Collection maintenance/evaluation; weeding
    h. Periodicals workshops for public libraries with print subscriptions, not database subscriptions
    i. Digital kiosks & innovative displays (see also 3b)
    j. I'm struck by the lack of emphasis on new web services to integrate web and in-person library experiences.

3. Technologies:
    a. digital and downloadable media
        i. technology petting zoo road show (see also 3.j.)
        ii. e-readers
    b. display kiosks
    c. online conferencing/collaboration
    d. presentation tools (Prezi)
    e. mobile apps
    f. Database training (60% either very likely or likely)
    g. Metadata & cataloging: FRBR, RDA, linked data
    h. vendor platforms: ProQuest 64%, OverDrive 59%, EBSCO 48%, NetLibrary 47%, Gale 33%, Recorded books 30%
    i. Open-source options, maybe pre-installed & configured on loaner/donated computers

4. CE formats
    a. Prefer half-day instructor-led workshops
        i. For conferences: 1-day limit
        ii. Publish conference session schedules early to facilitate travel planning.
        iii. Location is an essential field for any face-to-face event listing
        iv. Location-aware search could help: Google calendar/map mashup might allow search for local events within particular time windows?
    b. Also welcome online classes, instructor-led and self-paced
        i. But comments indicate problems with access and poor interfaces
        ii. Very interested in hands-on trials and exercises
        iii. Need collaboration with fellow learners
        iv. Lots of interest in WebJunction specifically

> > > v. Use the online format to bring in presentations from around the country? Fresh perspectives, new ideas.
> > c. NOT classes conducted via social media! (But maybe use SM to stay in touch after??)
> > d. Staffing trainee's normal duties during is a challenge, especially for small libraries
> > > i. Coverage is limited by cross-training in tech tools
> > > ii. Ironic: More easily available training for colleagues would help to free up people to schedule their own training
> > e. speakers bureau listing by training topics?

The CE committee has begun analysis of learner topics listed in the user survey, completing a compilation learning topics ranked by frequency of appearance. To set priorities, the committee could emphasize the top ten (in bold below), or it could look to a breakpoint in the data at about 140 mentions. Ordered by frequency of mention (high to low), they are:

- **eBooks**
- **eReaders**
- **Community outreach and promotion of library services**
- **Downloadable media (training the public)**
- **Excellent customer service for the public**
- **Self-management skills: staying calm in crisis, positive ways to deal with stress**
- **Conflict resolution**
- **Excellent internal customer service**
- **Adult readers' advisory**
- **Marketing our libraries**
- Leading from any position
- Displays (effective, affordable)
- Staff burn out
- Marketing online tools (how to make use of them)
- Advocacy for libraries and library values
- Using stats effectively
- Intellectual freedom training for library staff
- Digital media device training (collaboration with vendor)

These two sets of notes can be refined to define a topic taxonomy, which builds on the compilation of learning topics discovered in the survey to identify categories for CE content on WLA.org. It was developed by first grouping item-level topics then defining mid-level topics expressing the nature of the grouping. Finally, top-level topics express groupings of mid-level categories to complete a three-tier structure. Individual course listings and links can then be placed under the top-level and mid-level categories to help learners navigate and discover course listings relevant to them.

Input from the CE Committee will be needed to further refine and prioritize this listing into a workable strategy for identifying, linking, and promoting access to content resources in these areas.

Instructional Formats

Survey respondents indicate widespread acceptance of online instruction, especially WebJunction lessons, although a solid contingent does express strong preference for face-to-face events. Opportunities for networking and collaborative exercises seem to be an important driver of that preference, with the drawback that travel to meeting sites is a challenge, especially for librarians serving rural areas. Those from small libraries face an additional staffing challenge, since time away from their desks may leave their colleagues scrambling and/or patrons unserved. Online instruction is accepted as a practical solution for these problems.

The survey questionnaire seems not to have asked respondents much about use of social media and other online resources for interaction and collaboration. Results from one question indicate a lack of support for instruction delivered via social media, but that finding does not automatically invalidate the potential of SM tools for conversation and collaboration in connection with learning resources. This possibility may have significance in light of the high value placed on networking as a key benefit of face-to-face meetings. The CE Committee may consider adopting or adapting SM or other online tools for conversation to add some collaboration capabilities to online instruction. More investigation would be needed to identify options that would be familiar to learners and effective for their communication needs.

Survey results show experience with both face-to-face or online learning, each meeting a specific set of needs. The CE Committee need not choose one or the other, but rather craft a combination suited to the content to be presented and responsive to learner priorities.

User Groupings & Personas

A rich picture emerges from survey results of several categories of learners to be served by WLA CE content. Learners vary in their locations in the western part of the state versus eastern and southern Washington, and between urban or rural areas. This distinction is critical for face-to-face events due to pressing issues with travel. Urban areas concentrate potential attendees, allowing cost-effective hosting for enough learners within a relatively small travel radius. Staff of rural libraries have similar training needs but much more challenging logistical issues.

A mostly parallel distinction emerges between large and small libraries. At a small, rural library, difficulty of traveling far for training is compounded by the difficulty of filling the trainee's duties while away. Larger libraries may have more options for shifting staffing to cover absences. Together, these two issues make a compelling case for online training to serve learners from small, rural communities. That benefit comes at the cost of lost opportunities for networking and socializing with colleagues, which may prevent much informal learning. As mentioned, online collaboration tools may help somewhat to compensate for this problem.

Survey respondents overwhelmingly work in public libraries, with the count of 2-year college library staff a distant second, then 4-year college, K-12 school libraries, and government libraries. For purposes of defining continuing education guidelines, college library staff at different types of institutions may have needs similar enough to be considered together. Government research libraries may have similar needs

to college libraries, depending on the proportion of their mission devoted to serving high-level policy analysis and general public open records access. The needs of K-12 school libraries overlap significantly with the youth programs of public libraries, and survey results show strong interest in learning to support early literacy, story times and youth readers advisory, and general outreach.

Another key distinction centers around learner roles in the library. Survey responses show a strong emphasis on public services, including reference but also encompassing services to children and teens, job seekers, and underserved ethnic communities. Another group of respondents have management duties and need instruction especially in human resources issues, both legal /policy questions and soft skills like leadership and conflict management. Technical services are less often emphasized, but important needs are evident for instruction in technologies and tools, especially vendor packages and e-readers, as well as emerging standards like RDA and FRBR.

Survey results suggest that training needs cross traditional distinctions in library staffing between public and technical services, and between degreed librarians and paraprofessional staff. Members of all groups share topic-focused needs such as e-readers and other emerging technologies and varying needs of patron groups. Paraprofessional staff, in particular, are facing expansion of their roles and duties as libraries adapt to budget pressures, so their needs span a wide range of library activities. Their learning challenge is compounded by the increase of part-time staffing, which limits time available for training across that expanding range of topics. The CE Committee would do well to consider these trends as it organizes training content and emphasize topics important to all library professionals rather than traditional distinctions around library staffing.

Respondents enjoy strong support from their employers for training needs, but within tightening constraints of budget and staffing. They are willing to devote vacation and off-duty time to professional instruction, but most employers make provision for devoting on-duty hours to learning, as well. The need to travel for face-to-face events can significantly complicate this dynamic, as mentioned, and online learning tools are welcomed as at least a partial solution.

Only 30 percent of respondents are currently WLA members. Comments throughout the survey actively support an emphasis on access to instructional content, however, suggesting that the CE Committee's efforts in this area could be a strong enticement for the rest to join. Expanding membership rolls would increase resources available to further expand this benefit for all. WLA may consider providing favored access for members to this important material, or it may define a price advantage for members, to enhance this enticement and to ensure that non-members help to support development of the content they want.

WLA can resolve this wide variety of needs by defining a few learner personas. A persona is a tool of information architecture practice that defines a fictitious character profile encapsulating combinations of priorities across audience members. The technique helps to distill and focus wide-ranging information about stakeholders into a few manageable user stories. Instructional programs and content can then be packaged to match these sets of composite needs, since some individuals and groups share priorities enough to be considered together. This consolidation helps to promote service to important user

communities within a coherent model of WLA's prospects for continuing education content. This project will include development of a set of learner personas as a deliverable to help in setting clear priorities for the final information architecture, navigation structure, and content strategy. Marketing professionals also frequently make use of personas like these, and the users stories developed for this project may prove useful over time for other purposes of the committee and WLA.

Conclusion

The user survey conducted in 2011 provides an excellent starting point for refining and focusing WLA's strategy for meeting continuing education needs within Washington's community of library professionals. Ongoing tracking of learner response to the revamped CE presence on WLA.org should continue this solid tradition and support continued improvement of service to WLA members.