National Library of Ireland

Training and Development Documents 2008 - 2010

“Life is not about finding yourself.

It’s about creating yourself.”

George Bernard Shaw

January 2008

CONTENTS **PAGE**

Introduction by Director ……. 3

Training and Development Policy …….. 4

Training & Development Needs Analysis ……. 6

Recommended Training and Development Plan 2008-2010 …… 17

Guidelines for training interventions ……. 27

Refund of Fees Scheme ……. 30

National Library Study Support –

Higher Diploma in Library and Information Studies …….. 35

Application and Letter of Undertaking for Refund of Fees Scheme …… 36

Application form for Training …….. 38

Course/Seminar Evaluation Form…….. 39

Dear Colleagues

It gives me great pleasure to launch the National Library's Training and Development Needs Analysis and Training Plan. The Board of the National Library in its Strategic Plan for the period 2008 to 2010 identified its staff as the institution's key resource and it committed itself to equipping staff through training and development to reach their full potential and thereby contribute fully to the achievement of service excellence.

The Training and Development Needs Analysis was carried out with the active participation of many Library staff at all levels: it thus represents a realistic appraisal of the challenges facing the Library and the current skill levels of staff. The Training Plan incorporated in this document sets out seven key areas which were considered to be an appropriate focus for training activities in the next few years. Work is already underway to commence the delivery of those specific recommendations.

I would like to thank all who contributed to the preparation of this Training and Development Needs Analysis and Training Plan, including staff and the Institute of Public Administration who acted as consultants in the process.

The successful delivery of the training and development initiatives identified in the document will require the commitment of resources both in terms of budgets and staff time. While there are always constraints on financial resources, I will ensure that every effort is made to assign appropriate resources to training consistent with the Library's annual budgetary allocation. In terms of staff time, a balance will have to be found between ensuring the maintenance of the Library's public services and facilitating attendance at training courses. All staff will have to work together to ensure that this balance can be achieved. I have no doubt but such cooperation will be forthcoming and that through the measures outlined in the Plan the National Library will be better equipped to meet the challenges that lie ahead while staff will be better supported in the performance of their jobs and will be better placed in terms of career development.

In conclusion, I would encourage staff to avail of the training opportunities that will be provided for them under this Plan.

Aongus ó hAonghusa

Director

Training and Development Policy

In order to meet current and future needs of the business, the National Library of Ireland will ensure the provision of opportunities for staff members to gain the necessary skills and knowledge they require for the adequate and safe performance of their tasks and duties. The National Library of Ireland recognises the importance of maintaining a committed and competent workforce and will, so far as is possible, encourage the development of individual skills and abilities to enable staff members to maximize their career potential

ACTIVITIES

The National Library of Ireland will:

- Provide induction training for all new entrants and, if appropriate, to staff on internal transfer, to ensure their timely and full understanding of all those arrangements that apply to their work and location

- Provide appropriate systems and methods for identifying training needs

- Provide appropriate systematic training and/or related education to enable all staff members to reach the required performance standards

- Provide additional training/education for staff members as may be necessary for future job change or promotion

- Ensure the necessary training for health and safety purposes

- Adhere to best practice guidelines regarding before, during and after training/development

- Ensure the regular evaluation and review of all training activities so as to make sure that necessary standards have been achieved and to support the improvement of training methods.

RESPONSIBILITIES

- The Keeper Administration and the Head of Human Resources have overall responsibility for the organisation and administration of training within the National Library of Ireland

- It is, however, the individual responsibility of each Keeper, line manager and supervisor to ensure that the training needs of their staff are analysed and met within established priorities and budgets, in particular through the PMDS process

- It is also important to state that all staff have an individual responsibility to proactively assist in the identification of their training needs and potential training opportunities and to avail of the opportunities offered to participate in training initiatives, including through active self-learning and development on the job

INDUCTION TRAINING

- All new staff members, or those transferring to new jobs or locations within the National Library of Ireland, will receive appropriate training and support.

CURRENT STAFF MEMBERS

- Every staff member will be subject to a review by his or her line manager, at least annually, to ascertain whether any training needs exist as the result of under-performance, changes (or potential changes) to job requirements, new technology, equipment, processes or systems, etc. This annual review will take place within the Performance Management and Development System (PMDS).

- It is particularly important that health and safety requirements are kept under regular review; any identified needs in these areas will take precedence.

- Identified training needs will be recorded and will be part of an overall National Library of Ireland training plan and budget.

- The National Library of Ireland's training plan will be considered by the Management Advisory Committee and will provide the basis of approved training activities for the coming period.

- Individual staff members will be encouraged to contribute to the identification of their own training needs and, if these are confirmed by their line manager, they will be recorded and included in the above plan.

TRAINING RECORDS

- All training activities must be recorded, and staff members should contribute to their production. Copies of training records will be kept on the Human Resource Management System in the Human Resources Unit.

TRAINING EVALUATION

- At the end of any training activity, the line managers responsible will evaluate the training that has been provided in respect of its delivery, achievement of training objectives and costs.

TRAINING AND DEVELOPMENT NEEDS ANALYSIS

Executive Summary

The report which follows is the response of the Institute of Public Administration (IPA) to a request to conduct a training and development needs analysis (TDNA) for the National Library of Ireland (NLI), to assist with the development of a three-year plan to deliver a response to the needs identified and with the development of a training policy.

Relevant data concerning the strategic challenges facing the Library into the future and their consequences for training and development was gathered from a number of sources within the organisation, including senior management and staff at all levels. This data highlighted training needs in seven key areas. They are:

1. A management development intervention for senior managers (MAC; AP/equivalents; AKIs)

2. Supervisory/team leader development programmes for all staff in supervisory positions

3. Customer service/front-line service delivery workshops

4. Personal Development for all staff to focus on self-awareness, self-development, communication styles and team working skills;

5. An IT skills development programme (basic and specific skills depending on roles and needs). Other specialist equipment/systems training needs were also identified;

6. An orientation/induction programme for new staff

7. Responses to individual, section or other training/skill needs identified through this process and through PMDS

Delivery of these interventions over the coming three years will play a significant part in achievement of the objectives of the NLI's Strategic plan 2008-2010.

1. INTRODUCTION

The National Library of Ireland (NLI), under the aegis of the Department of Arts, Sport and Tourism, is a national cultural institution whose main function is to conserve, restore, maintain and enlarge the library material in the collection of the Library for the benefit of the public and to establish and maintain a record of library material in relation to Ireland and to contribute to the provision of access by members of the public to material relating to other countries.

The NLI was established as an independent body with effect from 3 May 2005 and as such it is a relatively young organisation in terms of developing a new strategic direction and administrative structures at local level to support the development of the organisation. While acknowledging the skills and expertise that are currently within the organisation, this TDNA has been undertaken to identify, with management and staff, emerging developmental needs and gaps in existing skills and expertise.

In order to help the NLI continue to provide and indeed expand the range of services provided in the future, the Institute of Public Administration (IPA) was asked to look at the role of training and development in meeting the challenges envisaged. Specifically, IPA were asked to:

- Conduct a training and development needs analysis (TDNA) for the Library, involving as many staff as is practicable in the process

- Develop a realistic and implementable training and development plan to meet the needs identified, covering the next three years

- Recommend an appropriate training policy

2. METHODOLOGY

There are approximately 120 staff working within the National Library, comprising professional, technical, library and administrative grades. Given this relatively small scale, and the fact that the Performance Management Development System (PMDS) is designed to identify training and development needs at an individual level, it was agreed that the use of formal job analysis methods would not be appropriate for this analysis. Instead, an approach comprising two key principles was adopted. These were:

- Inclusiveness – to invite contributions from any member of staff, to ensure that as many needs as possible are identified.

- Triangulation – to be able to check for consistency or conflicting messages in the responses, by using a number of different sources and a number of different methods to gather data.

To achieve the aims of the intervention and include the principles above, the following process was undertaken.

Key person interviews

In all, 11 interviews were conducted with key senior people, including the Director, Keepers, Head of Human Resources and others. The purpose of these meetings was to get a clear picture of the Library's strategic direction and its implications for training, development and staff mobility. The meetings also considered their views of the appropriate knowledge and skills available in the organisation at present, and other indicators of training and development needs. These meetings lasted an average of 45 minutes.

Staff focus group meetings

Five meetings with groups of staff, each lasting up to two hours, took place with staff representing different grades and areas within the Library as shown below. An additional meeting was scheduled with Science and Art Attendant staff but they chose not to attend the meeting.

GROUP	NUMBER OF ATTENDEES
Assistant Keeper's Grade I	14
Assistant Keeper's Grade II	
Higher Executive Officers, Executive Officers, Staff Officer, and equivalent grades, Senior Library Assistants, Library Assistants Grades I, II,	15
Service Attendants/Cleaners	5
Clerical officers/Shop	13
Library Assistants Grade III	7

These meetings involved a structured questioning process, and sought to elicit information on needs relating to the following:

- Training (skills for current roles)
- Development (preparation for future responsibilities)
- Education
- Internal v external training and development
- Training v non-training solutions (e.g. rotation, special projects, visits, etc.)

Needs analysis questionnaire

For the benefit of those who could not attend an appropriate group session, or who wanted to contribute further insights, a questionnaire was distributed to all staff. This contained a number of questions concerning training and development needs and how they might be met.

Outputs from PMDS process

Some 60 completed personal training and development plans under the PMDS system were examined. These provided useful information around some very specific needs expressed.

In total, sixty-five NLI staff contributed directly to the TDNA. This number was made up staff members attending focus groups, or participating in interviews and answering questionnaires. When this number is combined with the analysis of other documents it represents a very comprehensive audit of Training and Development needs.

Competency framework

At all times during the process IPA were keen to ensure that all training or development activity proposed should contribute to developing competencies included in the centrally agreed PMDS competency framework for the civil service and also adopted by the NLI.

3. THE CLIMATE FOR LEARNING AND DEVELOPMENT

Examination of the climate for learning and development

Comments gathered in the course of the strategic planning process were examined and key messages concerning the 'climate' for learning and development were highlighted.

The purpose of examining a climate for learning is to give an indication of the likelihood that (a) people in the organisation are interested in engaging in training and development and (b) that their learning will be applied on the job afterwards. Factors such as motivation to learn, as well as manager, peer and organisational support all play an important part. As such, the examination of relevant comments gathered from a range of sources during the strategic planning process focused mainly on the strategic aims of *developing staff* and *developing the organisation*.

The comments gathered certainly reinforced a view expressed elsewhere of a desire for training at all levels, from induction of new people through to supervisory and management training, issues discussed elsewhere in this report. There is a sense from the comments that this need was more strongly expressed by more junior members of staff, particularly in the light of improving their prospects for promotion and mobility. There was also an indication of a need for managers and supervisors to be more involved with their staff (e.g. through clearer reporting lines and greater face-to-face and inter-personal communication).

It is important to note that these comments should be taken in the context of what respondents feel should be done to improve the climate for learning within NLI. They do not take into account the observation, echoed in many parts of the organisation, that for the most part, employees of NLI bring a high degree of professionalism to their jobs, and take great pride in performing them.

4. RESULTS

Challenges identified – key person interviews

There was a strong degree of agreement amongst this group of respondents concerning the challenges facing the Library, both internally and externally. As these are already well known to members of the organisation, they will not be discussed in detail here, but instead the main ones will be summarised. They are:

- Identification, introduction and impact of new technologies;
- Increasing public expectations in relation to both the quality and range of Library services;
- The changing profile of Library users, from 'readers' who visit the library in person (often for academic and research reasons), to those from the wider society;
- Adapting to the demands and challenges associated with the move away from being part of a Government Department to operating as an independent body under a Board.

Challenges identified – focus groups

Responses from the focus group sessions conducted showed a significant level of agreement with those from the interviews with regard to the challenges seen as important into the future.

Challenges identified – other sources

As the emphasis of both the individual questionnaires distributed and the PMDS forms completed is more on training and development needs than on challenges facing the NLI, these particular sources did not add anything not already highlighted. What is interesting from examination of the competency framework is that almost all of the training and development needs identified (as will be seen later) belong in the quadrant of *Group and Interpersonal Effectiveness of the PMDS competency framework referred to earlier.*

Key person interviews – ksa requirements

In response to the challenges outlined above, those interviewed felt that (at a broad level) the skills, knowledge and other attributes (KSAs) necessary to meet those challenges would be:

- Better management of people on the part of all those who have such responsibility
- A greater focus on the 'new' type of 'customer'
- Improved technology skills

Focus groups – ksa requirements

There was also a significant amount of agreement between attendees at focus group meetings and individuals interviewed regarding perceived training and development needs. However, within the focus groups it was possible to explore some of these needs in greater depth, and as such they will be discussed in more detail. They fall into a number of broad categories and are described below. How the identified needs might be met will be discussed later.

People management

The need for effective management of the staff of the Library emerged as an important theme in discussions at all levels. It was particularly cited in the context of creating conditions at work where staff can perform at their best, enabling them to use the skills they possess whilst also developing others. The particular management areas seen as important were:

- Managers'/supervisors' understanding of the need for good people management
- Skill in providing clarity to staff in terms of expectations and standards
- Managing performance, including underperformance
- Interpersonal and communication skills
- A greater degree and a higher level of inter-personal/face-to-face communication throughout the Library
- Managers/supervisors working more effectively as 'teams'
- Greater engagement with and skill in the use of the PMDS
- Greater clarity around reporting structures

Customer focus

While acknowledging that there are needs in this area to be addressed, it is also important to note that throughout the TDNA it was clear that staff take an enormous pride in their work and the role that the NLI plays. They also have a good appreciation of the needs of library users.

The need for all those who encounter users of library services directly to be both skilled and confident in doing so was also highlighted as very important. In particular it was emphasised that staff in general have a need to know about goes on in parts of the Library other than their own, which in turn would enable them to feel more capable in dealing with queries, as well as better understanding their own job. This was seen as being of particular importance for new staff joining the Library, thus making the process of orientation within the Library easier. Aspects of 'customer care' raised during the sessions were:

- Better knowledge of the Library and its functions
- Skill in dealing with questions or complaints from members of the public
- Assertiveness
- Understanding those with special needs
- Need for consistency in standards of customer service delivery and overall approach to users of NLI

IT skills and specialist equipment

Technology and equipment and how best to use and exploit such resources was another training and development area brought up at each session. Needs identified varied from individual to individual and section to section, but largely comprised the following training needs:

- Basic IT skills across the Library;
- The systems in use in particular Library departments for staff involved in using such systems e.g. cataloguing systems, digital processes, Human Resource Management System (HRMS), financial management systems;
- The operation of particular specialist equipment relating to activities such as photographing, photocopying, CCTV monitoring and conservation.

Other

The areas of priority for training and development are those which have been described above. In addition, however, some needs were mentioned on at least one occasion, and as such deserve some consideration:

- Personal development
- Project management – this issue wasn't discussed in detail, but reflected a desire on the part of some attendees to see in-house projects undertaken with a greater degree of structure
- Time and stress management – this was mentioned by a very small number of participants, in the context of managing one's self and one's priorities
- Irish language – given the remit of the NLI in relation to material relating to the Irish language, the legal requirement that NLI have an adequate number of staff competent in the Irish Language and the increasing Irish language service delivery requirements for all public bodies arising from the Official Languages Act 2003, it is essential that appropriate Irish language training and support is provided at all levels in the organisation.
- Writing skills
- Promoting a positive working environment, including training in anti bullying and anti harassment policies, partnership, communications and team working
- Health and safety (It should be noted that separate health and safety audit will be carried out in 2007 in the NLI and one of the outputs from that process will be a health and safety training programme)

Needs identified from other sources

Sixty PMDS forms were examined (only the section dealing with the personal training and development plan). Most of these expressed training needs in areas that have already been discussed, although very little detail was provided. Nevertheless, purely in terms of number of times mentioned, the areas were:

- IT skills
- Management/supervisory skills
- Cataloguing (IPA also noted that a training subgroup of an internal NLI cataloguing and descriptive standards group has looked at training needs in this area)
- Manuscript handling
- Digitisation procedures

Questionnaires

Eight questionnaires were returned (all but one from staff in the same grade), citing training requirements in line with those above, as well as providing useful background information on matters relating to Library operations.

5. METHODS OF TRAINING AND DEVELOPMENT IDENTIFIED

The next section of the report describes the range of ways in which the identified training and development needs might be met. The options described were all suggested by individuals at interviews and/or group meetings. All of them are in line with 'best practice' ways of addressing different learning requirements and will be outlined briefly here.

Generic Courses delivered by External Training Companies

Attendance at an external course is a valuable way of getting new perspectives on one's role within an organisation and its challenges. By meeting with and exchanging experience with those from other, often very different organisations, and participants can gain important new insights into how they do their job. On the negative side, if such courses were not tailored to NLI needs, course content might not have the same direct relevance.

Specifically Designed Courses for NLI

With this type of course, two options were repeatedly suggested. One option is to have a course specifically designed to meet a particular need within the Library (for example, customer focus) and delivered by an expert from outside the organisation. A second option is to use in-house experts to deliver a course. This would make sense where the subject matter is quite specialised and the expertise is already available in-house.

Conferences and seminars

Another very valuable way of bringing knowledge back into the organisation is for appropriate individuals to attend conferences and seminars in their particular area of expertise, thus keeping up-to-date with the latest thinking. They also afford the opportunity to network with individuals in similar positions.

Visits to other libraries and appropriate institutions

In a similar way, encouraging staff to visit their 'opposite numbers' in libraries and other relevant institutions can have the effect of comparing how other organisations cope with similar challenges.

Dedicated on-the-job support, such as coaching

Whether as a stand-alone option, or as an addition to another (formal) learning opportunity, using coaching on the job is an excellent way of transferring practical learning and help ‘make it stick’, as well as building better working relationships.

Job rotation and mobility

Job rotation (within one’s own section) or secondment to another section within the Library (or indeed outside it) can provide useful learning opportunities and may also have a motivational effect.

Mentoring

Individuals can also benefit from individual opportunities for mentoring. This could be provided either through internal personnel or though working with external professionals or through linking with people from other sister organisations. These programmes might be of either a formal or informal nature and be of either a fairly short, intensive nature or spread over a slightly longer period.

RECOMMENDED TRAINING AND DEVELOPMENT PLAN

The next stage concerns how best to meet the training and development needs identified during the process just described. Seven key areas have been identified which should be the focus of attention for NLI's training activity over the coming three years. They are chosen for two reasons:

- A high degree of importance has been attached to them by staff at all levels in the organisation;
- They contribute to the development of important and relevant competencies.

They are:

1. A management development intervention for senior managers (MAC; AP/equivalents; AKIs);

2. Supervisory/team leader development programmes for all staff in supervisory positions

3. Customer service/front-line service delivery workshops

4. A personal development module for all staff to focus on self-awareness, self-development, communication styles and team working skills;

5. An IT skills development programme (basic and specific skills depending on role and needs). Other specialist equipment/systems training needs were also identified;

6. An orientation/induction programme for new staff

7. Responses to individual, section or other training/skill needs identified through this process and through PMDS

(1) MANAGEMENT DEVELOPMENT INTERVENTION

The senior management group is a critical group within the organisation for driving results and managing change. A development intervention will yield the best outcomes if it (a) is centred on developing common purpose and shared understanding of their role and purpose; (b) deals with the real issues they are facing; and (c) includes an element of self-awareness and self-development. It was the recommendation of the IPA that the intervention be phased over three years with the significant piece being undertaken in Year 1. Years 2 and 3 can be viewed as continuing the process and building on the initial investment. A programme such as the following is recommended.

Management Team Development Programme	
For whom	Senior Managers (MAC; APs/equivalent; AKIs)
Duration	An initial commitment of 4-6 days meeting as teams, plus individual work on competency development and review
No. of participants	All members of the senior management group
Programme outcomes	At the end of the programme, participants will: • Understand clearly their role within the management team • Be more effective in that role, through the identification and development of particular skills and abilities
Indicative content (can be adapted to suit team needs)	• Assessment of the operation of the management team in relation to its goals, the roles within the team, how it goes about its work and relationships within the team • Assessment of management competencies at team and individual level, and action plans to address changes • The critical importance of good people management • Providing clarity – setting goals, expectations and standards • Effective communication • Managing performance – giving feedback, dealing with underperformance, the manager as coach • Leading your team – team goals, roles, processes and relationships • Managing change – creating a climate for change
Suggested methodology	• Initial meeting with each senior manager • Team and individual competency assessment, using appropriate psychometric instruments (e.g. Leadership Effectiveness Analysis, MBTI, etc.) • Feedback of data gathered • Identification of team priorities and individual competency development plans (CDP) • Workshops on topics above, as well as review of CDPs • Team projects to consolidate learning • Telephone coaching support

(2) SUPERVISORY/TEAM LEADER DEVELOPMENT

The TDNA highlighted the need for some considerable investment in people management skills for all staff involved in staff supervision. It is for this reason that IPA recommend an extended programme consisting of six days and spread over a three/four month time frame. Essentially the aim would be to look at ways of developing a key group of people involved in staff supervision to take on the challenging role of management. It is IPA's recommendation that time is spent in identifying the core components of such a training intervention and that *supplementary supports* will be required to ensure the success of this training. Such support would include conversations with their managers, both before, during and after the programme. A programme such as the following is recommended.

Supervisory/Team Leader Development Programme	
For whom	Those within the Library with responsibility for supervising others
Duration	6 days
No. of participants	8-10 per programme
Programme outcomes	At the end of the workshop, participants will: • Understand the critical role of the supervisor in ensuring effective organisational performance • Be able to clearly define and communicate roles and responsibilities for the team/workgroup • Be able to manage the performance of team members by: providing clarity and direction; effectively giving both positive and negative feedback; and generating appropriate conditions for motivation
Indicative content	• The critical importance of good people management • Providing clarity – setting goals, expectations and standards • Managing performance – giving feedback, dealing with underperformance, the manager as coach • Leading the team – team goals, roles, processes and relationships • Managing change – creating a climate for change • Interpersonal and communication skills
Suggested methodology	• Six days distributed over a three/four month period. An action plan, involving work-based (practical) assignments to be completed in the interim • The workshop methodology should include role play to develop communication skills, and real-life case studies from participants' own experience • Where appropriate, psychometric instruments to increase self-awareness and provide a basis for action should be included • If enough staff are available to attend at the one time, this programme would be best delivered in-house

(3) CUSTOMER SERVICE/FRONT- LINE SERVICE DELIVERY WORKSHOPS

Similar to the supervisory/team leader development programme, this training forms another critical intervention that requires careful customisation. For instance, IPA recommend taking time to ensure that relevant mini case studies are identified and created. In addition, it could add value to audit the things that are working well and to identify specific areas for improvement with targets to aim for. It is IPA's experience that front line staff will work best when they are supported by good management systems. It is for this reason that IPA suggests that the managers of front line staff also participate in a programme geared for them. A typical customer service programme would contain the following.

Customer Service Workshop	
Level	Front Line Staff
Duration	1 day
No. of participants	8-10
Workshop outcomes	At the end of the workshop, participants will: • Understand the principles of quality customer service • Develop interpersonal skills required for delivery of a quality service to internal and external customers • Develop their ability to listen, empathise and respond effectively with all customers • Develop skills in communicating effectively with customers face to face, on the telephone or in writing • Be able to deal with difficult and aggressive customers
Indicative content	• Putting yourself in the customer's shoes • What is meant by 'professional' service • Understanding the needs and expectations of your customers • Professional interaction with all customers whether face-to-face or on the telephone • Listening and questioning skills • Understanding assertive, passive and aggressive behaviour • Managing difficult customer situations
Suggested methodology	• A high degree of interaction is recommended • Real-life case studies, exercises and skills practice to emphasise the link between theory and practice

(4) PERSONAL DEVELOPMENT MODULE FOR ALL STAFF

The purpose of this module would be to promote and develop self-awareness amongst all staff, in terms of personal and career development, communication styles and team working skills.

Consideration would need to be given as to whether this should be a stand alone module to be offered to all staff or integrated with other training programmes referred to above.

(5) IT SKILLS DEVELOPMENT (AND SPECIALIST EQUIPMENT)

In order to meet a need expressed across the organisation for improved basic and specific IT skills, IPA propose the following.

The Library should continue to promote the use of IT (including to facilitate communication across the organisation) by ensuring that access to computers is readily available to all staff, including those who do not need to routinely use computers as part for their jobs, and should continue to make available courses in aspects of basic IT such as Email and Word. Other more specialist IT courses should also be made available, particularly where directly relevant to a person's job, e.g. Excel, Access, PowerPoint, Cataloguing Systems, HRMS. Possession of IT skills is rapidly becoming indispensable in all areas of working life. In terms of delivery, a number of options are available.

- Using in-house experts to provide basic courses (especially in email and word processing to continue to promote the use of computers across the organisation which will also facilitate internal communication)
- Using external companies (if in-house resources do not permit) to provide courses in the more specialised IT systems;
- Delivery via computer-based packages
- Financing/subsidising attendance at evening classes (e.g. VEC) through the refund of fees scheme

In relation to specialist equipment, it is considered that the most appropriate way of delivering training would be to provide in-house on the job training to maximise its relevance to those directly involved in using such equipment.

(6) STAFF ORIENTATION/INDUCTION

It is very important for new employees to become familiar with and understand as early as possible how the Library goes about its business. Proper orientation is important for a number of reasons – as well as reducing anxiety and helping the individual 'make an impact' more quickly, it also helps instil organisation values.

An effective orientation programme would be likely to include the following:

1. A brief description of each department

These sessions are presented by representatives of each department, or someone extremely close to the action. It should be someone who is able to give all the details and explain how the department and each person fits into the overall operation of NLI.

2. A tour of the facilities

New people need the grand tour of NLI as early as possible. They'll need to know where to find things and how to reach key people. A tour also helps them understand how the operation is set up and how it operates from day to day.

3. Human resources information and routine forms to fill out

New employees have to learn an overwhelming number of policies and procedures. Explaining these face to face and discussing them is much more effective than expecting people to read them all from a manual.

4. Systems and equipment instruction

Orientation is also a good opportunity to train new people how to operate computers, library catalogues, phone systems, copiers, voicemail etc.

5. An overview of key skills and employee qualities

The orientation program can be used to highlight key concepts and skills that are valued at NLI such as customer service, initiative, quality and team productivity.

6. A look at the organizational culture

Orientation provides an opportunity to give an overview of NLI's unique values, history and culture.

7. A discussion of NLI's future and promising new developments

Most likely, this will be led by one of NLI's senior managers. The intent should be to get new employees thinking about the future and NLI's strategic direction and vision.

8. An introduction of key managers

During orientation new employees should be introduced to all of the senior members of the management team. This gives them an easy, effective way to match names and faces.

9. A question-and-answer session

As mentioned earlier, orientation is the ideal forum for asking lots of questions. Encourage this by hosting a Q&A session in the middle or at the end of the program.

10. A meeting with the Director

A talk from the top is the perfect way to conclude the programme. It's also another opportunity to let new staff know what is required of them, as well as what they can expect in return.

How all the above responses would translate into a training and development plan is shown overleaf.

NATIONAL LIBRARY OF IRELAND – TRAINING PLAN 2008-2010

Year	Management Team Development	Supervisory/Team Leader Development	Customer Service Workshops
1	• Identify members of this group. • Buy-in/get commitment from senior management group. • Contract with provider. • Design programme with key outcomes. • Deliver module I & II. • Evaluate.	• Identify numbers in this group. • Get buy-in and commitment for training. • Contract with provider. • Co-design customised programme. • Deliver modules I to III. • Evaluate	• Identify staff requiring this programme. • Identify core components of a programme specific to NLI • Contract with provider. • Design customised programme. • Run pilot. • Evaluate.
2	• Module III – follow up day. • Optional – individual coaching.	• Module IV – follow up/check in on progress and top up day. • If necessary, run programme again for another cohort.	• Run programmes for all staff. • Design a programme for managers of front-line staff – managing quality systems. • Identify benchmarks/indicators of improvement.
3	• Module IV – taking stock and planning next steps. • Optional – individual coaching.		• Run feedback programmes e.g. customer panels/mystery shopper type initiatives to assess customer care standards.

NATIONAL LIBRARY OF IRELAND – TRAINING PLAN 2007-2010 (continued)

Year	Basic IT Skills Development Courses	Specific IT and specialist equipment Skills Development	Orientation/Induction Programme
1	• Assess volume of demand and gaps in in-house capacity including any residual gaps in access to computer facilities. • Prioritise need against business demands. • If possible, set up a formal schedule of in-house learning negotiated with staff and managers.	• Access volume of demand and gaps in in-house capacity – consult on relevant specialisms required e.g. cataloguing, HRMS, specialist equipment in particular sections (activities such as photographing, photocopying, CCTV usage and conservation). • Prioritise need against business demands. • If possible, set up a formal schedule of in-house learning negotiated with staff and managers.	• Review current programme against best practice guidelines. • Engage relevant managers in developing and being involved in an enhanced programme.
2	• Identify external providers and, depending on volume/resources, hold specialised courses in-house or send staff to external courses.	• Identify external providers and, depending on volume/resources, hold specialised courses in-house or send staff to external courses.	• Pilot new programme. • Evaluate. • Formally build in new steps with assigned responsibilities.
3	• Ongoing as required.	• Ongoing as required.	• Roll out new programme on an 'as needs' basis or twice yearly depending on staff turnover.

In addition, training will need to be provided to address other specific training needs identified including:

- Time and Stress Management
- Writing Skills
- Positive working environment
- Irish Language Courses
- Project Management
- Health & Safety courses (subject to separate audit so not included in the plan other than in relation to a positive working environment)
- Trainer training

GUIDELINES FOR TRAINING AND DEVELOPMENT INTERVENTIONS

The transfer of learning back to the workplace following training and development interventions is of paramount importance, as research has suggested that perhaps as little as 10-20% of what is learned through these interventions results in changed behaviour on the job. However, there are a number of factors which, if given attention, will result in a much higher rate of return. Some of these are described below, and can be used as a checklist for providers delivering courses internally or externally, as well as for attendance at seminars and conferences. They are categorised into activities that can be undertaken before, during, and after the intervention.

Before the intervention

Ensure that participants are notified in good time regarding their attendance at a particular course, conference, seminar or programme (the word *course* will be used from here on to describe these events). This allows time for a number of things to happen:

Pre-course work

It is often very beneficial for participants to begin engaging in the course before they actually attend it. Relevant reading is one example. Participants can also be asked to think about certain aspects of course content, e.g. through recalling critical incidents and how they were handled. Finally, this is often the appropriate time to complete relevant instruments such as competency profiles, but also can be used for completing other questionnaires such as personality or learning styles.

Pre-course meeting

Every participant needs to know what they will gain from their investment of time and energy in attending the course. Given the multitude of demands on their time, the perceived benefits need to be made very clear. A vital element of this is a pre-course meeting with their immediate boss. This meeting should be used to identify reasons for attending the course, main areas for development, expectations and possible applications of learning and how the course might be used to address these. It can also be used to discuss outputs from any pre-course work, if appropriate.

During the course

With any learning event, usually the most positive comments arise when there is a clear link between the theoretical basis for the content and its practical application on the job. To ensure this happens, providers should, as far as possible:

- **Deliver the course in modular form**

Development-type programmes, such as management or supervisory development in particular, should ideally be delivered in modules of 2-3 days, with a number of weeks in between modules to allow opportunity for reflection, and for application of learning on the job.

- **Use application-oriented objectives**

Objectives (for the course and for individual content areas) should ideally be stated in terms of what participants should be able to do on return to their jobs (assuming the opportunities to do so are provided).

- **Make the training as relevant to the work situation as possible**

Examples, cases, incidents, etc. should as far as possible relate to the real-life work situation of participants. When examples are used which go outside this experience, clear links should be made between the learning from the example and its application to work. Providers also need to be aware of the organisational context in which participants on the course operate. Finally, involving participants where possible in determining content will increase its relevance to them.

- **Teach general principles and their practical application**

Participants' learning and maintenance of this learning on the job will be enhanced where they are taught general (theoretical, contextual, etc.) principles underlying practical management skills as well as the skills themselves.

- **Vary the training methods and media**

As far as is practicable, and in keeping with the previous two recommendations, a variety of different methods and media should be used to take account of the different learning preferences of participants. Appropriate guest speakers can also add variety, but their content and presentation quality needs to be high.

- **Provide “ideas and applications” notebooks**

An opportunity should be provided for participants to systematically note new ideas and applications (sometimes called a 'reflective journal') as they arise during the course, perhaps at the end of each session. This will help with retention of important learning.

- **Have participants create an action plan**

Significant time should be given within the course for participants to formulate a (SMART) action plan, which should include specific actions to be taken to ensure the application of skills learned. Perhaps incorporated as part of this (particularly with longer courses) could be a 'relapse prevention' element to help participants identify potential barriers to application of new learning and possible ways of overcoming them.

- **Include an action learning component**

Action learning as a learning tool has proven to very effective, and should certainly be considered for development-type programmes. Based on a combination of learning from addressing real-life organisational issues and reflecting as a group on performance in doing so, it can lead to powerful individual and organisational learning.

- **Include some inter-module application work**

This could be in the form of an individual or group work-based 'project', in which case guidelines regarding its purpose and scope should be clear and the 'project' manageable. Alternatively, the work could be in the form of specific work activity to be undertaken to develop particular competencies, called a competency development plan. Objectives are set, an appropriate learning method chosen, and achievement documented and reflected on.

After the course

While the influence training providers can have on participants after the course is limited, they should nevertheless encourage participants to engage in some or all of the following:

- **Meet with their manager**

This is crucial in terms of 'closing the loop' begun with the pre-course meeting. Plans for implementation of the participant's action plan should be discussed, and barriers and supports to implementation identified. The support of participants' managers is crucial here. In this regard, managers who are skilled in coaching are in a position to be of most help.

- **Take responsibility for monitoring their own behaviour following the course**

This involves the participant doing such things as:

- Setting (small) goals
- Initiating particular behaviour changes (e.g. planning a communication differently)
- Looking out for opportunities to apply new learning (e.g. conducting a feedback session)

REFUND OF FEES SCHEME - DEPARTMENT OF FINANCE CIRCULAR 23-2007

Introduction

The National Library of Ireland operates its refund of fees scheme on the same basis as the Department of Finance scheme for the civil service, set out below. Throughout the circular for "civil service" and "Department/Office" read National Library of Ireland. For "Head of Department" read Director. During 2008, it is intended to draw up a list of suitable areas of study (see para 6 below) that the National Library considers will assist in achieving the business needs of the Library and support the personal and life long learning needs of officers in the Library.

See also separate section following on National Library Study Support – Higher Diploma in Library and Information Studies/Achival Studies

Circular 23/07: Post-Entry Education – Refund of Fees, Study Leave and Examination Leave

A Dhuine Uasail

1. I am directed by the Minister for Finance to refer to the existing circulars and general instructions covering refund of fees, study leave and examination leave. This circular consolidates existing arrangements and supersedes all previous circulars and instructions covering these matters.

Purpose of the Circular

2. The circular sets out the arrangements to facilitate Departments/Offices in building appropriate skill and expertise levels and in supporting officers' efforts in the area of self-development and life-long learning. In the context of the on-going need to develop new skills and new ways of working, these measures are directed at enhancing workplace performance in the Civil Service and they recognise that assisting officers' career development is a worthwhile investment.

3. Consistent with Civil Service strategic management objectives, the approach of the circular is to maximise the discretion available to Departments/Offices in addressing post-entry education matters in ways that are most relevant to their own areas of responsibility. In using this discretion, the overall goal of Departments/Offices should be to provide as much support as possible for relevant staff education and development, subject to the general conditions governing the refund of fees, study leave and examination leave set out in this circular. The Performance Management and Development System (PMDS) generally provides the framework within which relevant education and development measures can be identified. Subject to adherence to the conditions set out at paragraph 11, the application of this circular need not be confined to education and development needs identified in the PMDS process.

4. The arrangements set out in this circular should be applied in a transparent way by Departments/Offices.

5. Departments/Offices should monitor the operation of the refund of fees scheme to ensure effective skill development for the organisation as well as equality of opportunity in access to training and development. In particular Departments/Offices should monitor the uptake of training and development opportunities under the scheme by staff with disabilities, to ensure equality of access.

Courses covered

6. This circular applies to courses of study which meet all of the conditions listed below:

   (a) are deemed by the Head of the Department/Office to be relevant to the Civil Service employment of the officer(s) attending them. Departments/Offices may from time to time draw up a list of suitable areas of study that they consider will assist in achieving the business needs of the Department/Office and support the personal and life long learning needs of officers in the Department/Office;
   (b) lead to a second or third level educational, professional or vocational qualification or a qualification in a language other than English (including sign language);
   (c) are provided by a recognised educational institution or professional body and
   (d) are pursued primarily in the officer's own time.

Refund of fees

7. Officers pursuing courses which fulfill the conditions set out in paragraph 6 above may have the appropriate course and examination fees refunded to them by the Department/Office that approved the application, subject to the conditions set out at paragraph 11. It is at the discretion of each Head of Department/Office whether or not to set priorities as regards courses of study. Officers transferring from one Department/Office to another during an academic year will receive the refund from the Department/Office that approved the course, irrespective of the stage in the year when they transferred. For subsequent years of study, the officer should apply for a refund of fees to his/her new Department**/**Office and where possible, will receive a level of refund of fees similar to that available to them in the previous Department**/**Office. In such circumstances, Departments/ Offices should as far as possible continue to provide a level of refund of fees similar to that available to officers in their previous employing Department**/**Office.

8. In all cases, the decision as to whether some, all or none of the fees will be refunded rests with the Head of the Department/Office who must take into account (i) the estimated total cost of fees and travelling expenses (if any) and (ii) the available financial resources. The refund (if any) will generally be made at the end of each completed academic year/course period in accordance with the conditions set out in paragraph 11.

Advance funding of fees

9. Advance funding of fees, either in whole or in part, may be made at the discretion of the Head of the Department/Office where he or she is satisfied that:

   a) the attendance of the officer at a particular course of study is directly relevant to the work of the Department/Office and the proposal for the course of study has been initiated by the Department/Office and/or by the officer's manager supported by the second supervisor;
   b) the course represents value for money and
   c) appropriate safeguards have been put in place in accordance with the conditions set out in paragraph 11.

Reimbursement of travelling expenses

10. In certain circumstances, officers who qualify for refund/advance of fees may apply for reimbursement of certain travelling expenses. Travelling expenses are only payable where additional cost is incurred. The decision as to whether some, all or none of the travelling expenses for an approved course will be reimbursed rests with the Head of the Department/Office. In addition, reimbursement is subject to the following:

a) the course should, as far as possible, be attended at the nearest centre offering such a course;

b) the officer should be serving outside the general urban area in which the course is being attended;

c) reimbursement should be restricted to extra travel necessarily undertaken in attending the course, travel between office and home being discounted;

d) the basis of reimbursement should be the lesser of
   (i) the cost of travelling by public transport, where this is available, or
   (ii) mileage at the Civil Service "Reduced Rates" current at the time;

e) payment of travelling expenses for courses which involve travel to/from outside Ireland is a matter for individual Departments/Offices to consider.

Conditions governing refund/advance of fees and reimbursement of travelling expenses

11. Refund/advance of fees and/or reimbursement of travelling expenses under this circular are subject to the following:

a) payment can be made once only in respect of any academic year/course period and in each case is subject to appropriate verification from the institution providing the course that the officer participated satisfactorily in the course during the period and took the relevant examinations or other prescribed tests. Payment should not be made in respect of years, periods or examinations which are repeated;
b) each officer to whom a payment is made is required to sign a standard form of undertaking committing himself/herself to return the payment in full in the event of leaving the Civil Service before completing one year's service (i.e. twelve months) in respect of each academic year/course period for which a payment has been made. The academic years/course periods do not themselves reckon as service in this context. For example, an officer undertaking a three year course will be required to provide three years service after completion of the course;
c) officers should apply for a refund of fees before undertaking courses of study. Applications for courses already undertaken will not be approved.

Departments/Offices may provide that a refund of fees will only be granted where an officer can provide appropriate verification that the relevant examinations have been passed.

12. Worksharers are treated in the same way as full-time staff for the purposes of refund/advance of fees or reimbursement of travelling expenses.

Fees for Membership of Professional Organisations

13. The decision as to whether some, all or none of the fees payable for membership of a professional organisation will be refunded where a student must be a member of the

organisation in order to be eligible to sit exams, rests with the Head of the Department/Office. The decision shall be consistent with Circular 47/01 on the Reimbursement of Professional Membership Fees.

To whom applicable

14. This circular applies to all civil servants. The decision to grant a refund/advance of fees or leave under this circular is a matter for the Head of each Department/Office.

Study Leave and Examination Leave

15. This circular introduces a number of improvements in the leave available to support individuals undertaking further education and development. The grant of such leave must, at all times, be subject to the exigencies of the public service. Departments/Offices have a role to play in ensuring that a balance is struck between the overall organisational needs and resources and the pursuit of personal and career goals. In this context, individual officers and their Departments/Offices should, through advance planning, seek to ensure that both individual and organisational requirements are facilitated satisfactorily.

Paid Study Leave

16. Officers who qualify for a refund/advance of fees, may be allowed paid study leave as follows:

(a) ten days in respect of the final year only of a third level primary or masters degree;
(b) five days for the other years of a third level course. The Head of Department/Office may, in particular instances, where the course of study relates very closely to the business objectives of the Department/Office, have the discretion to increase the amount of paid study leave granted. Any increase would be subject to there being significant benefit to the Department/Office or Civil Service by way of skills or expertise gained by the officer;
(c) the Head of Department/Office may also grant an additional 2 days in each year of the course, exclusive of the normal 5 days study leave, in order to facilitate compulsory attendance at residential schools in partial fulfillment of the requirements for the attainment of a degree by distance learning; these additional days may be granted only in respect of days on which the officer is scheduled for duty;
(d) three days for each year of a second-level course, subject to a maximum of ten days overall;
(e) officers may be allowed carry forward up to five days paid study leave from the second last year to the last year of a course;
(f) officers not attending/undertaking the whole course in a given year will have said study leave reduced pro-rata;
(g) paid study leave will not be allowable for a year when an examination has to be repeated;
(h) study leave for officers availing of worksharing arrangements will apply on a pro-rata basis.

17. The references above to "..each year of the course.." should be interpreted as covering only the normal length of the course as defined by the appropriate academic institution, which is not necessarily the same as the length of time taken by the person to complete the course. For example, if an officer is following a two-year course but avails of options to spread the modules over a period longer than two years, the maximum amount of paid study leave available to that officer over the period is ten days.

If an officer is undertaking a course which does not qualify for a refund/advance of fees, the Head of the Department/Office may at his/her discretion permit some paid leave for study purposes.

Unpaid Study Leave

18. Unpaid study leave may be granted as follows:

    a) where an officer qualifies for refund/advance of fees, up to three months for study or other purposes directly relevant to the course being pursued;
    b) up to one academic year to enable an officer to pursue a postgraduate course or any specialised course of study, provided the Head of the Department/Office is satisfied that the course will be of direct benefit to the officer in the performance of his/her official duties, and provided a reasonable period of service has already been given by the officer in his/her present grade.

    The decision to grant unpaid study leave rests with the Head of Department/Office.

19. Officers who wish to pursue courses which involve regular or continuous absence from official duties, may be facilitated under the career break or worksharing schemes, subject to the terms prevailing at the time.

Examination Leave

20. Officers who qualify for a refund/advance of fees may be allowed paid examination leave for the purpose of sitting the examinations held by the institution/body providing the course. The period of paid absence should be limited in each case to the day(s)/half-day(s) which are actually and necessarily spent at the examinations. Paid examination leave will not be granted where an examination has to be repeated. The decision to grant examination leave rests with the Head of Department/Office. Worksharers will be granted examination leave depending on whether or not they were scheduled to work for the period in question.

If an officer is undertaking a course which does not qualify for a refund/advance of fees, the Head of the Department/Office may at his/her discretion permit some paid leave for exam purposes.

Occasional Attendance at seminars/courses during normal working hours

21. The Head of Department/Office may, where he or she considers that attendance from time to time at seminars or courses during normal working hours is of particular relevance to the work of the officer concerned or of particular benefit to the Department/Office, may permit some or all of such absences without loss of salary.

Attendance at conferring/ graduation ceremonies during normal working hours

22. The Head of Department/Office may, where he or she considers that attendance at a conferring/graduation ceremony during normal working hours is appropriate in the context of the course undertaken and the commitment involved on the part of the officer, permit attendance at such ceremonies.

Circulation

23. This circular should be brought to the attention of all civil servants in your Department/Office.

National Library Study Support – Graduate Diploma in Library and Information Studies or a Higher Diploma in Archival Studies

The Library will as appropriate and on a case by case basis consider supporting a staff member who is interested in pursuing the Higher Diploma in Library and Information Studies or Archival Studies.

The support may be provided through a combination of special leave, revised rostering etc and eligibility for the refund of fees and study leave schemes subject to the usual conditions.

Eligibility for consideration for the above will be based on:

- 4 years exemplary work record
- Excellent sick leave and punctuality records
- At least average or above average results on all categories in annual PMDS reports.

Application Form for Refund of Fees

Academic Year _____

This form must be completed and returned by ……..to the HR Unit for the attention of Denise Kennedy, National Library of Ireland, 4 Kildare Street, Dublin 2

Name:
Grade:
Section:
Phone Extension:
Business Address:
Course Title:
College/University:
Subjects to be studied:
In what way will the course benefit you in your work/self development?
Duration of Course:
Year of course being attended in 2007/08:
Cost of Course:
Signature of Line Manager:
Signature of Keeper
Signature of Applicant:

Please note that should your application be successful you have to complete a form of undertaking (attached)

Refund of Fees

Letter of Undertaking

Whereas I the undersigned of …….. am pursuing/have pursued in my own time a course of education covering a term of …… and whereas the Director of the National Library has accepted said course as being relevant to my employment in the Library and he has agreed, subject to the necessary funds being available to the Library, for the Library to refund to me at the end of each completed academic year or corresponding period of said course then ended provided that such refund shall not be made more than once in respect of any one such academic year or corresponding course period and that I shall have furnished to the Director a written statement from …… certifying that during the relevant academic year or corresponding course period my attendance at or participation in said course of education was satisfactory, that I underwent all relevant examinations and prescribed tests and that I furnished original vouched receipts. Now in consideration of the premise I hereby undertake that should I leave the Library before I have completed twelve months service in respect of each academic year or corresponding period of the said course for which a refund of fees shall have been made to me (such service not to commence until the completion of said course), I will repay the Director such sum as shall be the amount of the fees refunded to me as aforesaid for each and any academic year or corresponding course period in respect of which I shall not have completed twelve months service hereinbefore provided.

Dated this …….. day of ……. 200

Signed by the said: ……

In presence of: ……

Application Form to Attend Training Course/Seminar

National Library of Ireland Application to Attend Training Programme/ Seminar/ Lecture etc

Name: …….. Date: ……..

Programme Details: ……..
(please also attach course brochure)

.....

…….....

……

……

Cost of Programme: …….....

Costs of travelling to/from the Programme (include expenses: ……

Outline the relevance of the programme to your work: ……

……

……

Outline how the learning from the programme will be applied to your work on your return:

……

……

Signed: ……

Employee: ……..

Line Manager: …… Keeper ……

To be completed by Keeper

*(Please confirm below the relevance **or** not of this programme to the employee/organisation and whether you support the application.)*

Course/Seminar Evaluation Form

To be completed by staff on completion of course/seminar and sent to HR Unit

National Library of Ireland

Course Evaluation Date: _____

1. Training approach:

Please tick the appropriate column	**Excellent**	**Good**	**Fair**	**Poor**	**Very poor**
Content of course					
Allocation of time					
Pace of course					
Quality of materials and handouts					
Range of material covered					
Course exercises					
Opportunities to participate					
Duration of course					

Comments on training approach:

_____

_____

2. My Learning:

Please tick the appropriate column	**Excellent**	**Good**	**Fair**	**Poor**	**Very poor**
The degree of learning for me was…					
The chances that my learning will benefit me when I am involved in future recruitment processes…					
Overall this course is…					

What could be included?

_____

_____

What could be omitted?

_____

_____

3. As a trainer, _____ (trainer's name) is…

	Circle Your Rating	
Professional	10 9 8 7 6 5 4 3 2 1	Slap-dash
Helpful	10 9 8 7 6 5 4 3 2 1	Unhelpful
Decisive	10 9 8 7 6 5 4 3 2 1	Vague
Committed	10 9 8 7 6 5 4 3 2 1	Uncommitted
Practical/down to earth	10 9 8 7 6 5 4 3 2 1	Too academic
Relaxed	10 9 8 7 6 5 4 3 2 1	Tense
Creative	10 9 8 7 6 5 4 3 2 1	Predictable
Fun to work with	10 9 8 7 6 5 4 3 2 1	Humourless

Comments regarding training style:

_____

_____

4. Would you recommend this course to any of your colleagues?

Yes _____ No _____

If yes, which groups might benefit from attending?

_____

_____

5. Would you like to make any other comments about this course?

_____

_____

Signature **Date**

_____