

Training Plans at Berkeley

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Over one hundred fifty members of the General Library, University of California, Berkeley, list "training new employees" as part of their responsibilities, yet few if any of them have formal training in this area. Many have developed exceptional expertise as trainers while others founder for want of preparation and guidance. At the same time we believe that the quality of the new employee's introduction to the Library and initial job training significantly influence the quality of that employee's contribution to the Library's program.

Therefore, the Library has begun to provide more support to those with training responsibilities. At the invitation of the administration, Sheila Creth, then Assistant Director for Administrative Services at the University of Connecticut (Storrs), visited and consulted with the Library staff on personnel matters for two days during June 1980. One theme Creth repeated in her discussions with different groups was the advantages of written training plans for new employees. Her points were simple and persuasive: writing a plan in advance makes the trainer approach the training in a more thoroughly organized way, and a completed plan provides the new employee with a description of what to expect in the initial training period.

A written training plan enumerates the steps to be taken to provide the new employee with the orientation and skills required by their position. The plan may be just a list or it may detail what will be taught, when, by whom, and using what tools. The plans include general orientation (tours, introductions to key staff, etc.) as well as job-related training. Written training plans are typically organized by the new employee's supervisor, although individual sections may be written by staff having specific training responsibilities.

The response to Creth's description of the benefits of written training plans was enthusiastic, as evidenced by the activity which developed on many levels in the Library. Several trainers started writing and using training plans successfully. In response the Staff Development Committee (SDC) proposed in-house workshops on writing plans, in order to support those already using them and to encourage others. At another level, heads of Library departments proposed "a formal orientation and training plan for each new employee." The library administration began to require that a written training plan be on file before each new hire reports for work. The SDC's proposed workshop took on added importance and the task of implementation began.

Members of the SDC coordinated and guided

the workshop through completion. First came a brainstorming session involving fifteen staff members who developed the goals for the workshop and for a self-instructional booklet on writing plans. Five of the fifteen wrote the booklet, with the SDC coordinators editing and producing it. Finally, five staff members volunteered to lead workshop sessions eventually given to over 175 staff members.

The twenty-two page training plan booklet, whimsically entitled *Painlessly Preparing Personalized Training Plans*, is organized into two parts. Part one covers writing of training plans and gives tips on common problems trainers may encounter such as how to estimate the training schedule and how to overcome writer's block. The second part covers implementing the plan successfully and contains sections on communicating criticism and praise and a discussion checklist.

During the process of planning the workshop, another packet of support material, the *New Employee Orientation Packet (NEOP)* was developed to help trainers with the general orientation that each new staff member receives. This packet contains brochures, bulletins, handouts, maps, guides and leaflets and is divided into four sections: (I) Campus and Community; (II) The General Library; (III) The Employee's Department; and (IV) The Employee's Unit.

The first two sections were assembled by the Staff Development Committee. A supervisor or trainer can request a packet from personnel and then complete sections III and IV for the new employee with specific information, such as organization charts, annual reports, policy statements and work forms. A list of the contents of the *NEOP*, with suggestions of additions supervisors can make, is included in *Painlessly Preparing*. Time to examine the different sections of the *NEOP* would be scheduled into the training plan.

In a further effort to support training, the workshop coordinators identified three model training plans which had been developed and used successfully in the Library. These and others were organized for referral in the Library Personnel Office.

The workshop itself took two hours with a limit of twenty participants. Staff could not be expected to become experts in writing training plans after such a brief exposure. The workshop was intended to introduce the need for written training plans, to explain one system for writing training plans, and to briefly touch upon some of the other problems surrounding new employee training.

After defining a training plan and describing the resources available to make writing easier, we asked the participants to pretend that they were new employees being trained by the workshop leader. As they were trained, the leader deliberately made a number of common mistakes. The

staff were quick to point out these mistakes and offer suggestions for avoiding them. These suggestions, for the most part, centered around the need for more advanced planning before the actual training session.

Participants were then asked to write a short plan to train a new person to answer the telephone in their own unit. These two exercises showed not only the surprising amount of information a person needs to do a seemingly simple task but also the way a written plan, organized in advance of training, can help in the training process.

Even the most impressive written plans are wasted if they are not used. The second part of the workshop used role-playing, discussion and mini-lectures to deal with the actual practice of training. This section covered topics such as giving criticism and praise, and styles of supervision.


The Training Plan Workshop was given twelve times for 175 staff members who train employees. The participants were enthusiastic about the workshop, making comments such as: "Forced me to re-think the training process;" "Possibly the most useful...library workshop I've attended;" and "Makes the task of training less lonely."

Evaluations pointed out the need for help with other problems such as motivating employees.

Staff also felt that the second half of the workshop should be expanded into its own session. The Staff Development Committee, working closely with the Library's newly appointed Education Officer, has been focusing on further training programs, including a clearinghouse of training materials and a series of informal clinics for trainers.

The success of the Training Plan Workshops has prompted other groups to become interested in written training plans. Campus personnel borrowed many ideas to include in a campus-wide workshop for supervisors. One of the Library's workshop leaders gave the workshop to librarians at the Smithsonian Institution. The UCB General Library has begun offering the workshop to other libraries by arrangement, and the booklet *Painlessly Preparing Personalized Training Plans* is available for \$5 from the Librarian's Office, 245 Library Annex, University of California, Berkeley, CA 94720.

Editor's Note: The authors have both served as chairs of the Staff Development Committee, UCB General Library. Patricia Davison is a reference librarian in General Reference and Lee Jaffe is an assistant in the AudioVisual Media Center, University of California, Berkeley. ■ ■



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