
Compendium of 2015-2016 Mapping the Landscapes Project Findings and Data
Publication Notes

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Editor-in-Chief: Christina Drummond
Co-Editors: Katherine Skinner, Nayeli Pelayo, Courtney Vukasinovic, Amanda Focke, Eric Pourchot, Laurie Sather, Laurie Gemmill Arp, Phaedra Livingstone, Kendra Morgan, Barbara Rothermel, Lisa Sjoberg

Contributing Authors: Nathan Brown, Tom Clareson, Laurie Gemmil Arp, Jessica Aurelia Carr

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Executive Summary
Executive Summary

Author: Christina Drummond, Educopia Institute
Co-Editors: Katherine Skinner, Nayeli Pelayo, Courtney Vukasinovic
Release: 19 December 2016

Introduction

Triangulating the need for, supply of, and demand of continuing education and professional development offerings is a challenging feat. Yet, the professional associations, higher and continuing education programs, and others serving libraries, archives, and museums can better plan, develop, and schedule offerings when equipped with such information. While a range of education providers collect such data for their own alumni and memberships, field-spanning data collection and comparison is rare, severely limiting the visibility of partnership opportunities.

Given the diversity of roles both within and across the library, museum, and archives professions, one might question the value of data comparison across the fields. Learning offerings vary greatly by cost and range (e.g., from multi-modal programs to one-hour webinars, and pre-conference workshops to fellowships). The variety of organizations within fields has resulted in strong subfield cultures and associations, supporting vastly different operations (such as zoos and historical societies, state archives and private collections, and research and public libraries). While these diverse subfields see demand for offerings tied to specific work environments and staff roles, such targeted, job-responsibility focused offerings are not the full set of professional development that is needed or available.

Effective, efficient organizations meet their missions through individuals who wield robust skill-sets around organizational and project management, leadership, community engagement, collaboration, cross-cultural communication and so on. These skills, required by most effective organizations and businesses, highlight competency areas where training providers have fertile ground for collaboration across fields.

The Mapping the Landscapes project team, funded by the Institute of Museum and Library Services (IMLS) and facilitated by the Educopia Institute, aimed to explore this landscape of shared professional development needs. Between March 2015 and August 2016, three core activities took place.

1) Using interviews and a literature review, Educopia and LYRASIS staff, guided by a Field Assessment Task Force, examined the process of assessing professional development needs across multiple adult education sectors, to inform the needs assessment activities within this project.¹

2) Through interviews and focus groups, Educopia staff, guided by the Field Assessment Task Force, documented the challenges and opportunities related to collaborating at scale across the diverse array of libraries, archives, and museums (LAM) fields.²

Building upon the needs assessment and cross-sector collaboration findings, Survey and Focus Group Task Forces, nominated by the project’s Advisory Board, worked with TrueBearing Consulting and LYRASIS to gather nationwide, field-spanning data from LAM staff. Individual learners across diverse types of libraries, archives, and museums were asked about their own professional development providers, challenges, opportunities, and needs. Focus groups were conducted by LYRASIS at national association conferences (Archives*Records 2015, American Library Association (ALA)-Midwinter, American Association for State and Local History (AASLH)/Michigan Museums Association (MMA) Annual Meeting, and the American Alliance of Museums (AAM) Annual Meeting) plus two virtual sessions, reaching 61 participants in total. Simultaneously, TrueBearing Consulting developed, administered, and visualized a national web-based survey, collecting data from 2,788 individuals.

This cumulative project report presents focus group and survey results, highlights select findings, and presents guidance and instrumentation for future data gathering with minimized overhead. The document begins with an executive summary authored by the project’s program manager. Project resources generated by LYRASIS and TrueBearing Consulting follow. Document sections include:

1. **Executive Summary** (pgs. 1-18) addressing the project’s background, highlights findings across the focus group and survey efforts, and recommends future paths for continued research for professional development planning.

2. **Data Reports and Analysis** (pgs. 19-147) including summary survey and focus group reports, as well as more detailed individual focus group session reports. This section of in-depth data includes the overall survey model built upon a combined matrix of shared archives, museums, and libraries professional competencies compiled from pre-existing professional competency directories. Those planning future professional development offerings will find immediate value in the library, archives, and museum tables of expressed need by specific competency areas.

3. **Data Collection Guides and Instruments** (pgs. 148-214) that provide associations and others who wish to incorporate this data collection effort into annual assessments, the survey instrument, survey distribution language, and focus group moderation and discussion guides for reuse.

4. **Raw Data and Visualizations** (pgs. 215-271) that provide for ongoing analysis, inclusive of de-identified raw focus group notes as well as survey data reports filterable by state and field.

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3 See pg. 154
4 See pg. 11
5 See pgs. 64-73
6 See pgs. 55-63
7 See pgs. 74-82
8 See pgs. 165-203
9 See pgs. 159-164
10 See pgs. 149-153
Project Background

The idea for the Mapping the Landscapes: Continuing Education and Professional Development Needs and Opportunities for Libraries, Archives, and Museums project originated within the Assessing the State of the Field Task Force of the Coalition to Advance Learning in Archives, Libraries, and Museums (Coalition). It resulted after leaders from numerous professional associations and training providers identified common challenges to combining and comparing their existing datasets around member professional development needs.

With the Coalition’s Assessing the State of the Field Task Force members providing project governance, the Educopia Institute (a Coalition member) obtained and administered IMLS funding to organize a 38-partner strong project advisory board, and facilitate three operational task forces that oversaw project details. Care was taken to balance advisory board participation across field, subfield, sector, and organizational perspectives, with nearly half of the 86 approached organizations accepting Educopia’s invitation to join the project.

The Advisory Board nominated recognized peers to serve on the Field Assessment, Survey, and Focus Group Task Forces, with the goal of seating two representatives per field on each task force. Both the Survey and Focus Group Task Forces used requests for proposals (RFPs) to surface, score, and recommend sub-contractors to handle data collection design and implementation. The Advisory Board voted to accept the task forces’ recommendations that TrueBearing Consulting administer the survey effort and LYRASIS administer the focus groups. Task forces guided the work of LYRASIS and TrueBearing, while the project’s Program Manager, Christina Drummond of Educopia, and Principal Investigator, Katherine Skinner of Educopia, provided overall project administration, management, and logistics support.

The success of this effort lays squarely on the actions of the many contributors to this project. Advisory board members and nominated task force representatives directly contributed to all aspects of the project through volunteer service. Their contributions were vital to shared competency mapping, survey instrument development, focus group discussion guide development, and data visualization design. This compiled report is as much a reflection of the individual contractors who implemented the data collection efforts as it is a testament to the volunteer contributions of the many people who helped to shape, form, distribute, and communicate about this project. Exceptional gratitude is owed to Amanda Focke, Eric Pourchot, and Laurie Sather who contributed dozens of hours beyond their peers to assist with competency mapping and survey development, and to IMLS for funding the detailed research, development, and facilitation activities.

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Table 1: Mapping the Landscapes Project advisory board and task force representatives

<table>
<thead>
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<th>Field Assessment Task Force Representative</th>
<th>Survey Task Force Representative</th>
<th>Focus Group Task Force Representative</th>
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<td>Constituent Oriented</td>
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<td>Califa InfoPeople</td>
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<td>Mike Hudson</td>
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<td>Northeast Document Conservation Center</td>
<td>Jessica Bitely</td>
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13 Through July 2015
14 Through February 2016
Finding Highlights
The data collected through this project followed best practices for both focus group facilitation and survey design and administration. Limited in scope to collecting self-reported data from individuals representing themselves (as opposed to their organizations or fields), this project reached a total of 61 individuals through focus groups and 2,788 through the online survey. That said, the findings below should be interpreted as trends for consideration as opposed to statistically significant facts or correlations. We highlight select findings here to invite professional development stakeholders to engage more fully with the following sections written by LYRASIS and TrueBearing Consulting.

More similarity than difference across fields
Surprising many on the project team, findings trended similarly across those who identify as librarians, archivists, or museum professionals. Professional development selection criteria, participation incentives, and barriers trended similarly. Examinations of pre-existing professional competency tables surfaced shared “common” competencies, which allowed for the identification of strikingly similar confidence levels and areas of shared need, as detailed below.

Participation drivers and selection factors for participation
Unsurprisingly, a majority (69%) of 2,480 survey question respondents indicated having a high level of interest in continuing education and professional development.

15 See Summary Survey Report section, pgs. 22-29, and Summary Focus Group Report section, pgs. 90-94, for detailed information
16 Note: this survey sample includes ten respondents from outside the United States and its protectorates
17 See Summary Survey Report section, pg. 29, for details on survey sample validity at institutional and geographic levels
Across the focus group responses, 62% voiced cost as a reason for selecting a specific learning offering. The next three most popular themes involved one’s ability to fit an offering into their schedule: geographic location (39%), session timing (31%), and offering duration (23%).¹⁸ Survey response rates trended similarly, with over 75% of archives, library, and museum-identifying professionals stating that fees, schedule, and proximity were “very important” or “fairly important” when selecting continuing education opportunities.¹⁹

Survey questions explored perceived access to educational support such as funding, staff coverage, supervisor, and colleague support. Responses for each field trended similarly, with a majority of respondents across all fields feeling complete or some support across all areas (See Figure 2). Across fields, funding and staff coverage showed the most room for improvement; however, associations and trainers should be cautious not to overgeneralize, and instead explore filtered data for their particular state and field of interest by using the interactive Tableau dashboards.²⁰

When asked why they pursue specific learning opportunities, nearly all survey respondents across fields identified important factors to be the improvement of their knowledge and skills for their current role, learning about emerging trends, professional interest, and curiosity. Networking, advancement, and credentialing were rated with lesser importance, suggesting that these factors are not universally seen as drivers for professional development. These populations may be driven most by a very practical approach to offering selection (i.e., will this help me do my job?) (See Figure 3).

**Variety of delivery modes and providers**

In-person, live virtual, online, and publication resources were rated as either “very-likely” or “somewhat likely” to be used by over 70% of survey responses across the fields.²¹ Recorded offerings were “very” or “somewhat likely” to be used by a lower majority of respondents, and had the most indicate they were “somewhat” or “very unlikely” to use them.²²

Focus group participants also identified 155 unique providers of continuing education and professional development servicing libraries, archives, and museums. These providers included professional associations of many types – national, profession, and role-based, as well as organizations that provide services to libraries, archives, and museums.

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¹⁸ Summary Focus Group Report section, pg. 101
¹⁹ Summary Survey Report section, pg. 40
²⁰ See Tableau Public data visualization and Tableau dashboard user guide sections
²¹ Summary Survey Report section, pg. 41
²² Percentage of respondents “somewhat unlikely” or “very unlikely” to use recordings: Archives (16%), libraries (15%), and museums (23%) Source: https://public.tableau.com/views/MtLdashboardset/MappingtheLandscapes Storyboard 6
Figure 2: Perceptions of continuing education and professional development support

23 Adapted from Mapping the Landscapes Tableau Public Storyboard 3
https://public.tableau.com/views/MtLdashboardset/MappingtheLandscapes
Figure 3: Importance rankings of reasons for pursuing continued education

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<td>Very important</td>
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<tr>
<td>Museum</td>
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<td>Library</td>
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<td>Archives</td>
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<td>Library</td>
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<td>Archives</td>
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<td>Library</td>
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<td>Library</td>
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<td>Archives</td>
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<td>Library</td>
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<th>Reasons: Workplace</th>
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<td>Library</td>
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<th>Reasons: Credentials</th>
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<td>Library</td>
<td>27%</td>
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<tr>
<td>Archives</td>
<td>30%</td>
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24 Adapted from Mapping the Landscapes Tableau Public Storyboard 4. [https://public.tableau.com/views/MtLdashboardset/MappingtheLandscapes](https://public.tableau.com/views/MtLdashboardset/MappingtheLandscapes)
Common competencies

Through the analysis and distillation of eight existing professional competency frameworks in use across the professions (Table 2), the Survey Task Force and TrueBearing Consulting distilled a Common Competency Taxonomy for archives, libraries, and museums, of 98 shared competencies spanning 25 topical areas.25 (Table 3)

The resulting common competency set illustrates shared job functions and professional responsibilities across diverse organizations. Six high-level competency areas emerged, reflecting responsibilities commonly found in positions across the LAM fields: basic (operational competencies), institutional management, leadership, technology, collections, and public facing. Second-level sub-competencies (e.g., project management under basic competencies), organize the 98 third-level specific competencies. The language within the Common Competency Taxonomy (Table 3) can enable collaborations and sharing of materials across associations and sectors by facilitating the use of a shared vocabulary for those developing offerings across traditional professional boundaries.

Table 2: Source lists of professional competencies

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<th>Organizational Source</th>
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<td>National Archives and Records Administration (NARA)</td>
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<td>Society of American Archivists (SAA)</td>
<td>Guidelines for Archival Continuing Education (ACE)</td>
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<td>Libraries</td>
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<td>OCLC Online Computer Library Center, Inc. WebJunction</td>
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<td>Competencies for Information Professionals of the 21st Century</td>
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<td>Curricula Guidelines for Museum Professional Development</td>
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<td>Committee on Museum Professional Training, American Association of Museums</td>
<td>Training for Entry-Level Museum Professionals</td>
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<td>American Institute for Conservation of Historic and Artistic Works (AIC)</td>
<td>Defining the Conservator: Essential Competencies, and Requisite Competencies for Conservation Technicians and Collections Care Specialists</td>
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25 For more information on the distillation process, refer to the Survey development process section of the Summary Survey Report, pgs. 26-27.
<table>
<thead>
<tr>
<th>Competency Area</th>
<th>Competency Sub-Area</th>
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| **I. Basic**    | A. Research         | 1. Methodologies for research  
|                 |                     | 2. Technological platforms for research  
|                 | B. Project Management | 1. Project management principles  
|                 |                     | 2. Lead work teams  
|                 |                     | 3. Monitor/Adapt project progress  
|                 | C. Awareness of Professional Context | 1. Theoretical/historical professional underpinnings  
|                 |                     | 2. Basic professional models of practice  
|                 |                     | 3. Relationships with allied professions  
|                 |                     | 4. Record-keeping  
|                 |                     | 5. Professional standards and best practices  
|                 | D. Professional Ethics | 1. Draw on basic values and ethics of sector  
|                 |                     | 2. Laws, regulations, institutional policies, ethical standards  
|                 |                     | 3. Culture of ethics/accountability  
|                 | E. Communication     | 1. Variety of communication methods  
|                 |                     | 2. Communicate effectively with diverse audiences  
|                 |                     | 3. Situation-specific communication  
|                 | F. Collaboration     | 1. Develop relationships to achieve common goals  
|                 |                     | 2. Work effectively in teams  
|                 |                     | 3. Manage org. politics, conflict, difficult coworkers  
| **II. Collections** | A. Collection Development | 1. Build collections  
|                 |                     | 2. Maintain collections  
|                 |                     | 3. Establish/apply criteria  
|                 |                     | 4. Policies and procedures  
|                 |                     | 5. Ensure collections quality  
|                 | B. Physical Collection Management | 1. Physical resources  
|                 |                     | 2. Control/access to physical collections  
|                 |                     | 3. Organize collections  
|                 |                     | 4. Sustain collections over time  
|                 | C. Physical Preservation Principles and Technical Skills | 1. Preservation activities  
|                 |                     | 2. Conservation activities  
|                 |                     | 3. Physical protection, authentication activities  
|                 | D. Digital Collections Management | 1. Digital resources  
|                 |                     | 2. Organize digital collections  
|                 |                     | 3. Control/access to digital collections  
|                 |                     | 4. Digital curation software  
|                 |                     | 5. Integrate tools into workflows  
|                 |                     | 6. Sustain digital collections over time  
| **III. Institutional Management** | A. Facility Design and Management | 1. Encourage patron use  
|                 |                     | 2. Safe environment  
|                 |                     | 3. Well-run environment  
|                 | B. Organizational Planning, Policies, and Procedures | 1. Understand laws  
|                 |                     | 2. Policies/procedures  
|                 |                     | 3. Strategic planning  
|                 | C. Supervision and Human Resources | 1. Recruitment and selection of workforce  
|                 |                     | 2. Lead and empower employees  
|                 |                     | 3. Performance management strategies  
|                 |                     | 4. Performance management standards, requirements  
|                 |                     | 5. Work with consultants, volunteers  
|                 |                     | 6. Support staff career development  
|                 | D. Institutional Affiliations | 1. Institutional credibility  
|                 |                     | 2. Information, feedback from advisory bodies  
|                 | E. Financial Management | 1. Basic budget/finance understanding  
|                 |                     | 2. Financial processes  
|                 |                     | 3. Identify, pursue multiple funding sources |
### Table 3 cont.: Shared professional competencies across libraries, archives, and museums

<table>
<thead>
<tr>
<th>Competency Area</th>
<th>Competency Sub-Area</th>
<th>Competency</th>
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</thead>
<tbody>
<tr>
<td>IV. Technology</td>
<td>A. Core Technology</td>
<td>1. Basic computer functions and tasks</td>
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<tr>
<td></td>
<td></td>
<td>2. Basic functions of email and web-based resources</td>
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<td></td>
<td></td>
<td>3. Apply technologies for learning/collaboration</td>
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<td></td>
<td>B. Intermediate/Advanced Technology</td>
<td>1. Automation systems</td>
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<td></td>
<td></td>
<td>2. Enterprise computing systems</td>
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<td></td>
<td></td>
<td>3. Network and security systems</td>
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<td></td>
<td></td>
<td>4. Server administration systems</td>
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<td></td>
<td></td>
<td>5. Technology planning</td>
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<td></td>
<td></td>
<td>6. Web design/development</td>
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<td>V. Leadership</td>
<td>A. Flexible and Reflective Thinking</td>
<td>1. Innovative thinking about mission and goals</td>
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<tr>
<td></td>
<td></td>
<td>2. Assess organizational shortcomings/assets</td>
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<td></td>
<td></td>
<td>3. Continuous improvement</td>
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<td></td>
<td></td>
<td>4. Consider impact in community and beyond</td>
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<td></td>
<td></td>
<td>5. Impactful ideas, environments, technologies</td>
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<td></td>
<td></td>
<td>6. Anticipate problems/opportunities</td>
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<td></td>
<td>B. Planning and Making Effective Decisions</td>
<td>1. Short-term/long-term planning</td>
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<td></td>
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<td>2. Identify clear outcomes</td>
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<td></td>
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<td>3. Evidence based decision making</td>
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<td>4. Responsibility for decisions</td>
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<td></td>
<td>5. Decisional transparency</td>
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<td></td>
<td>C. Leading Through Change</td>
<td>1. Internal/external support for change</td>
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<tr>
<td></td>
<td></td>
<td>2. Collaborate during change</td>
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<td></td>
<td></td>
<td>3. Build community relationships</td>
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<td></td>
<td>4. Environment that encourages problem solving</td>
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<td></td>
<td>D. Engaging, Motivating, and Inspiring</td>
<td>1. Motivate individuals to contribute</td>
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<td></td>
<td></td>
<td>2. Environment of trust and integrity</td>
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<td></td>
<td></td>
<td>3. Inspire others to think creatively</td>
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<td></td>
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<td>4. Environment of active communication</td>
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<td></td>
<td></td>
<td>5. Constructive feedback</td>
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<td></td>
<td>E. Cultural Competency</td>
<td>1. Awareness of diverse cultures and beliefs</td>
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<td></td>
<td></td>
<td>2. Foster an environment that respects cultures</td>
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<tr>
<td>VI. Public-Facing</td>
<td>A. Patron Services and Access</td>
<td>1. Respond to patron research needs</td>
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<td></td>
<td></td>
<td>2. Use online tools/communities for user engagement</td>
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<td></td>
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<td>3. Outreach services</td>
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<td></td>
<td></td>
<td>4. Opportunities for information, education, entertainment, lifelong learning</td>
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<td></td>
<td></td>
<td>5. Needs, interests of patrons across lifespan</td>
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<tr>
<td></td>
<td>B. Education and Training</td>
<td>1. Educational/interpretation programs</td>
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<tr>
<td></td>
<td></td>
<td>2. Public access technology</td>
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<td></td>
<td></td>
<td>3. Publications/other information</td>
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<td></td>
<td></td>
<td>4. Patron training</td>
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<td></td>
<td>C. Community Relations and Outreach</td>
<td>1. Demonstrate value of institution through evaluation</td>
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<tr>
<td></td>
<td></td>
<td>2. Build support for institution</td>
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<td></td>
<td></td>
<td>3. Communication, marketing, promotion of institution</td>
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<td></td>
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<td>4. Relationships with community orgs</td>
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</tbody>
</table>
Areas of shared need

The nationwide survey explored what the people working in libraries, archives, and museums define as critical competencies for their day-to-day work. Respondents selected up to three high-level competency areas that were critical to their jobs, and then rated their confidence levels on the specific competencies in each area. The resulting data was coded to develop heatmaps for professional development planners to spot where respondents felt a minor or significant need for training around a given topic. All competencies had some level of significant need within the responding libraries, archives, and museums populations. Notable trends include:

- Intermediate to advanced technology skills, digital collection management, and digital preservation competency areas received the highest percentage of respondents indicating a need for significant improvement. This is in stark contrast to the level of need that surfaced for basic, core technology skills, suggesting a moderate baseline level of technical knowledge in the average LAM professional.

- Around disaster management planning, nearly twice the library respondents indicated a need for significant improvement (29%), compared to their archives (17%) and museum/historical society peers (15%).

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26 See Heatmaps section  
27 Heatmaps section, pg. 265
Physical preservation principles and skills around conservation were identified as needing significant development by nearly a third of archives (31%), libraries (28%), and museum respondents (27%).

Empowering interaction with survey data supports ongoing offering development

Robust survey data with multiple demographic variables opens the door to a seemingly infinite number of research and strategic planning questions. Researchers and planners can explore the potential needs for a set of professionals in a given region (e.g., leadership skill development needs of archivists in Wisconsin). State, regional, and national associations can gain insights into how regional responses differ from the national (e.g., how accessible did Florida museum respondents perceive funding to be compared to all U.S. museum respondents).

Given the seemingly infinite number of questions that could be asked, TrueBearing Consulting worked with the Survey Task Force to develop a series of dynamically filterable data visualizations in Tableau Public to allow curriculum designers, program administrators, and other stakeholders to explore such questions independently by filtering reports by state and field. This approach allows for the crowdsourcing of deeper analysis and permits specific queries by professional associations looking to develop offerings for unique memberships. The survey data visualizations accessible for dynamic filtering include:

1. Competencies and confidence: bar charts indicating the percentage of respondents for each critical competency area, stated by confidence levels and stated need for skill development. (Interactive filters: field, state of respondent)
2. Assets and barriers to professional development by skill level rating: cross tab heat maps showing how groups of respondents with levels of need perceived barriers and assets such as funding, coverage, etc. (Interactive filters: field, state of respondent)
3. Interest, drivers, and barriers: pie and bar charts reflecting responses for a given field. (Interactive filters: field, state of respondent)
4. Reasons for pursuing professional development: ratings of how important advancement, networking, credentialing, professional interest, supervisory direction, emerging trends, and role-based knowledge are for respondents in a given field. (Interactive filters: field, state of respondent)
5. Decision factors informing offering selection: importance ratings on how much proximity, fees, felt need, organizer reputation, instructor reputation, schedule, sector-specificity, and virtual nature impact offering selection. (Interactive filters: field, state of respondent)
6. Likelihood of engaging with specific content delivery methods: bar chart importance ratings of respondent use of in-person, live virtual, recorded, published, or online resources. (Interactive filters: field, state of respondent)

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28 Tableau Public Mapping the Landscapes data dashboard portal
https://public.tableau.com/views/MtLdashboardset/MappingtheLandscapes
Additional information was published in Tableau Public to allow a better understanding of the survey sample, in terms of educational level, years in profession, age, funding source, employer support, and organizational size.

Another look across the data highlights where the greatest significant needs overlap, signaling the areas where cross-sector collaboration may have the broadest impact. (See Figure 5)

**Importance of language and identity for mixed audiences**

Across the survey and focus group efforts, a population of individuals surfaced who did not identify solely with a single library, museum, or archives field. Focus group facilitators found, “many of the participants had real trouble selecting their ‘type’ from among their association-designated categories… (m)any were resistant to categorize themselves, and some made up new categories.” Eleven percent of the survey population selected multiple field affiliations (indicated as “hybrid” respondents in the Summary Survey Report section tables), possibly already seeing themselves as cross-sector workers.

Yet, survey data reflected that sizable populations of library (49%), archives (44%), and museum (54%) learners see audience-specificity as “very important” when choosing an offering, indicating a potential split between this audience and those already participating in cross-sector learning. For marketing and content delivery, those seeking to engage professionals across the fields must keep in mind that individuals strongly identify with their field(s) and subfield(s). Focus group participants noted a number of barriers that could impede cross-field efforts, including differences in terminology, expectations, resources levels, and cultural traditions (e.g., such as a collections care vs. public access perspective).

Care must be taken to identify how best to connect with audiences when spanning fields, so that offerings are clearly perceived as relevant. Given the importance of language and field-identify, the Survey Task Force and TrueBearing Consulting took extreme care when compiling the competency tables; exploring shared and distinct vocabulary terms and embracing the native language of the disciplines whenever possible.

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29 Summary Focus Group Report section, pg. 92
30 Summary Survey Report, Sector representation section, pgs. 31-32
31 Source: https://public.tableau.com/views/MtLdashboardset/MappingtheLandscapeStoryboard5.
32 Summary Focus Group Report section, pg. 102
33 Survey development process section of the Summary Survey Report, pgs. 26-27
Figure 5: Competencies with over 10% of field indicating “significant need for development”
Participant openness to training across fields

Interestingly, 93% of focus group participants (57 of 61) expressed value in bringing the fields together for learning. Focus group discussion surfaced benefits such as broadening perspectives and exposing collaborative opportunities for personal and organizational benefit. As one participant shared, “Getting us out of our silos will benefit not only our organizations, but also society as a whole.” It is worth noting that 90% of those within the focus groups had already participated in cross-sector collaboration, making the concept of bridging across sectors not inherently novel.

Many focus group participants were already seeking professional development outside of their native fields. When prompted to identify topics ripe for cross-field programming, participants highlighted common operational areas such as grant writing and fundraising, managing digital humanities collections, digital preservation, and collections care. These conversations suggest that participants may already see the value in cross-field professional development in shared competency areas such as those reflected in the survey.

Future Professional Development Research

Beyond self-identification: assessing needs at organizational and professional levels

This robust data-set represents a moment in time, reflecting self-identified needs of library, archives, and museums staff (both paid and unpaid) circa 2015-2016. While this self-reported data is most useful immediately, prior to learner needs changing, professional development curricula and program offerings are developed and scheduled on multi-year timeframe. To better develop programming that meets the needs of professionals at the time of training, data should be analyzed on the professional development needs related to organizational directions (i.e., what skills will an organization need to function in two to three years) and professional trends (i.e., what future trends are expected to impact organizations across the field within five years) (Figure 6). Research into how best to capture these organizational and field

34 Summary Focus Group Report section, pgs. 83, 95
35 Summary Focus Group Report section, pg. 103
36 Summary Focus Group Report section, pg. 104
level needs will help curriculum designers and program offerings to better prepare learners for shifts within their organizations and fields.

**Longitudinal data-gathering to identify trends**

This 2015-2016 data-collection effort was the first cross-field attempt of its kind, aimed expressly at capturing professional development needs from individuals across the library, museum, and archives professions. The Common Competency Taxonomy can now serve as a baseline framework; yet, the data gathered from these focus groups and survey will have reduced value over time unless they become part of a continued data collection effort. After multiple, consistent collection efforts, trend analysis could begin to inform ongoing curriculum development. Individual associations can incorporate or leverage the instruments herein within their own member survey efforts; however, additional value could be gained by collating and aggregating results to maintain a national-level perspective of trends. Future efforts could also benefit by timing the survey to launch over winter months so that results could be shared at annual conferences and discussed in more detail at focus group sessions. Collecting data every two years would allow time to complete the full cycle of preparation, inclusive of lead-time for associations to allocate focus group space, coordinate survey messaging, and collect, analyze and publish data.

**Investigate similarities across sectors, not just fields**

Nonprofit, for-profit, public, and private institutions operate within distinct governance frameworks. While significant needs surfaced around community engagement, institutional management, external partnerships, and leadership; the operational reality is that each of these sectors use different tactics necessitated by their legal and governance models. It could prove useful to analyze professional development needs by sector across cultural heritage and memory institutions to explore differences and similarities. Such research could also shed light on the challenges faced by professionals working in hybrid environments, such as a privately sponsored museum on a public university campus.
Data Reports and Analysis
Summary Survey Report

Authors: Nathan Brown, Jessica Aurelia Carr, TrueBearing Consulting
Co-Editors: Amanda Focke, Eric Pourchot, Laurie Sather
Initial Release 5 June 2016

Preface

The *Mapping the Landscape* needs assessment in continuing education and professional development offers a broad and statistically reliable overview of current perceptions, needs, assets and barriers, levels of competency and confidence across and within archives, library, and museum professions in the United States.

Based on a comprehensive conceptual model, the *Mapping* survey data offers three valuable forms of information:

- Descriptive and comparative information regarding professional development and competencies across the three sectors, framed within a carefully constructed taxonomy to promote clear communication across professional cultures.
- Actionable data to promote evidence-based policy and program decision making in continuing education and professional development, including cross-sector collaboration in Continuing Education/Professional Development (CE/PD) program and curriculum development.
- A robust database to serve as a baseline for future inquiry in this area, along with foundational research methodologies.

In addition to this Viewbook, an interactive data visualization storyboard may be accessed at [http://truebearingconsulting.com/mapping/](http://truebearingconsulting.com/mapping/). The storyboard targets highlights of survey results and enables further exploration of the data. Links to additional supplementary materials, including instructions on how to get the most out of this data visualization and interpretive notes and an item-level glossary are also available on this page.

Background

The *Coalition to Advance Learning in Archives, Libraries, and Museums (Coalition)* was founded in 2013 in part to address the paradox of the increasing need and shrinking resources for continuing education and professional development (CE/PD) across these three fields by building a community to develop joint strategies and coordinate efforts. The Coalition strives to enable its constituents—stakeholders in CE/PD (primarily hosts, instructors)—to focus their limited funding towards CE/PD activities that have broad and deep impact. In order to accomplish this mission, the Coalition first identified the need to document the current state of the fields—identifying and understanding both the range of CE/PD efforts underway and the range of professional needs across each of these fields. The Coalition also fosters and strengthens relationships between the organizations and associations that support these fields to enable them to undertake joint work in a trust based environment. The *Assessing the State of the Field* workgroup of the Coalition was chartered in 2013, to begin strategizing how best to gather data to assist the Coalition and its constituents as they develop and fulfill a strategy leading toward effective, sustainable CE/PD.
environments that provide critical training for library, archives, and museum information stewards. This workgroup informally canvassed current CE/PD information sources, exploring those that can begin to gauge gaps and opportunities in offerings, both within and across field boundaries. In 2014, the group produced a draft data framework for the collection of CE/PD data on existing training offerings. This draft built upon and refined the data framework produced in the Nexus project, an IMLS funded planning project (2013-2014) that collected data about the library field’s CE/PD offerings for leadership training. Representatives from the Assessing the State of the Field workgroup act as executive leadership on the current project, known as Mapping the Landscapes. They are supported by over 38 project partners, and nominated community representatives sitting on this project’s Survey task force, who advise and collaborate regularly with the professional consultants engaged for the Mapping project.

About the survey effort
This project was made possible in part through a federal grant from the Institute for Museum and Library Services (IMLS) and undertaken by Educopia Institute, a nonprofit organization acting as fiscal host, in cooperation with the Coalition. The Mapping the Landscapes survey project aimed to establish a common core of data that explicitly benchmarks today’s CE/PD needs and opportunities in library, archives, and museum fields to identify the areas of surplus and paucity therein. The resulting data framework and visualization tools are expected to enable the Coalition to conduct ongoing market research, ultimately providing a vibrant knowledge source for the participating library, archives, and museum fields. The Mapping the Landscapes project developed the data collection instruments and workflows to enable the Coalition to regularly gather, analyze, and publish data regarding background about the Mapping the Landscapes Project, Mapping the Landscapes survey project team members and what CE/PD offerings are sought by librarians, archivists, curators, educators, technologists, and professional staff across the library, archives, and museum fields. Data from the current project as well as subsequent iterations will be used to inform, both national and local decision making, on policy and institutional management levels. Armed with this multi sector dataset, decision makers and CE/PD providers will be able to identify: gaps, common needs, common offerings, opportunities for collaboration within or across fields, and other crucial components. The data will enable both funders and CE/PD hosts to magnify the impact of their investments, while also making it possible for hosts across libraries, archives, and museums to coordinate resources to reach greater efficiencies and better results both within and across their fields.

Survey project team
Within the context of the Coalition, the Mapping survey project team comprised these groups:

- **Mapping the Landscapes Survey Task Force**: Formed of nominated representatives from libraries, archives, and museums with experience actively surveying staff on their professional development or continuing education needs, the task force provided project advisement, collaborating with the professional consultants engaged for this project on the development of the survey and its underlying conceptual model.
- **Educopia Institute**: Educopia provided project management services on behalf of the Coalition to advance learning in archives, libraries, and museums.
• **TrueBearing Consulting**: Educopia and the *Mapping* task force selected this Seattle-based multidisciplinary research and evaluation firm to conduct all technical aspects of this project, including conceptual model development, survey construction, delivery, analysis, and reporting. The TrueBearing team comprised staff experienced in research and evaluation for these sectors, and capable of building a product that will yield ongoing data to support evidence-based decision making in the CE/PD fields for archives, libraries, and museums.

The *Mapping the Landscapes* Survey Project Team members included:

**Survey Task Force:**

- Amanda Focke, MLIS, CA, DAS | Rice University
- Eric Pourchot, Ph.D., MFA, MBA | American Institute for Conservation of Historic and Artistic Works (AIC)
- Laurie Sather, MA, MLIS, CA | Mid-Atlantic Regional Archives Conference (MARAC), Hagley Museum and Library

**Educopia Institute:**

- Katherine Skinner, Ph.D.
- Christina Drummond, M.A.

**TrueBearing Consulting:**

- Nathan Brown, Ph.D.
- Jessica Aurelia Carr, J.D.

**Project strategy and survey conceptual model**

In order to construct a survey capable of producing the data necessary for effective evidence based decision-making, the Project Team developed a survey conceptual model (Figure 1) to delineate the relationships among the professional competencies that are the object of CE/PD, the drivers and barriers that may be present in either promoting or discouraging said competencies, and the outcomes and impacts expected as a result of improvement in competency. In addition, the model also incorporated the gap that may exist between reported competency and desired competency.

In order to determine what specific competencies across the sectors should be the object of this investigation, the team acquired documentary statements of desired professional competencies from one or more professional associations in each sector. A systematic analysis of these competencies yielded a competency taxonomy (Table 3, pgs. 6-7) organized into six domains. Each of these domains comprised a related set of competencies, labeled and described in a manner expected to promote a shared meaning across the sectors.

In addition to the competency domains, the conceptual model also included the domain of *individual confidence*. Substantial research suggests that the successful execution of a behavior (including professional behaviors that define specific competencies) depends not only an individual’s technical
ability, but also on the degree to which they have confidence in that ability. This insight has important implications for professional education curricula. Therefore, the project team incorporated confidence in the model and in the survey, as the relationship between competencies and confidence may well have a bearing on CE/PD strategies and priorities.

Once the six competency domains and their constituent skills were identified by the project team, survey item construction was based directly on language found within each sector’s professional competencies documents. In addition to competency and confidence domains, the final survey included items designed to capture individual demographics, attitudes and perceptions of CE/PD, and setting characteristics.

For a more detailed description of the project strategy and a guide to replication, see the Mapping the Landscapes Survey Procedures Guide.
Summary Survey Report Figure 1: Survey Conceptual Model

Mapping the Landscapes CE/PD Needs Assessment
Survey Conceptual Model

Desired Professional Competencies and Attitudes
- Basic professional competencies
- Collection competencies
- Institutional management competencies
- Technology competencies
- Leadership competencies
- Individual confidence/motivation

Reported Professional Competencies and Attitudes
- Basic professional competencies
- Collection competencies
- Institutional management competencies
- Technology competencies
- Leadership competencies
- Individual confidence/motivation

Gap Need/opportunity for CE/PD
Individual level

Outcomes
Detailed changes in professional behavior

Impacts
- Quality of stakeholder experience improved
- Coordination of resources: greater efficiency
- Better results within/across fields
- Project informs decision-making in policy, institutional management
- Funders, CE/PD hosts magnify impact of investments
- Support a “nation of learners”

Drivers/Barriers
- Individual
- Setting
- External

- Institution size
- Sector-specific structure
- Geography
- Organizational climate
- Availability of CE/PD
- Level of resources available (number of staff, budget)
- Access to technology
- Employee support: incentives to engage in CE/PD
- Norms and expectations
- Access to collegial support
- Timing of work cycles - opportunities for CE/PD
- Perceived demand/hindrance by public for services requiring new skills
- Access to inter-agency & cross-sector resources
- Sector-specific factors
- Scholarships, other external sources of funding
- Political/economic climate
Survey development process

The steps that the survey team completed to develop the survey instrument were:

1. **Identify threshold parameters and definitions.**
   What is a competency? “A competency is an observable, measurable set of skills, knowledge, abilities, behaviors, and other characteristics an individual needs to successfully perform a job.” (cf. National Archives and Records Administration, NARA Competency Connection)

2. **Develop survey conceptual model.**
   The survey team adopted an ecological approach that considered:
   a. Person factors (perceptions of individual skills and motivation that affect development, delivery and effectiveness of CE/PD, and perceptions of current availability and quality of CE/PD resources in the individual’s setting)
   b. Setting factors (key setting and sector factors that impact development, delivery and effectiveness of CE/PD, such as resources, technology, perceived institutional support)
   c. Interactions between person and setting (the effect of combined person and setting factors and its effect on CE/PD)
   d. External factors (factors outside of the individual’s setting that impact development, delivery and effectiveness of CE/PD)
   e. Desired outcomes and impacts

3. **Identify and gather existing sector competencies.**
   The survey team gathered existing competency sets from the relevant sectors and collaborated to compile these into a Competencies Crosswalk for side-by-side comparison. The primary competency sets used were:
   a. **Archives:** Society of American Archivists (SAA), “Guidelines for Archival Continuing Education (ACE)”; National Archives and Records Administration (NARA) “Competency Models – Core, General and Technical”
   b. **Libraries:** OCLC Online Computer Library Center, Inc., and WebJunction, “Competency Index for the Library Field”
   c. **Museums:** International Council of Museums (ICOM) “Curricula Guidelines for Museum Professional Development”; Committee on Museum Professional Training, American Association of Museums “Training for Entry-Level Museum Professionals”
   d. **Other:** American Institute for Conservation of Historic and Artistic Works (AIC) “Defining the Conservator: Essential Competencies” and “Requisite Competencies for Conservation Technicians and Collections Care Specialists”; Special Libraries Association (SLA) “Competencies for Information Professionals of the 21st Century”

4. **Create competencies taxonomy.** The survey team distilled the common competencies appearing across two or more sectors into a Competencies Taxonomy comprised of six domains. This taxonomy was refined by condensing conceptually overlapping competencies where possible and prioritizing for inclusion in survey.
5. **Item development.** The survey team drafted items that addressed domains in the Survey Conceptual Model, including the Competencies Taxonomy.

6. **Recruit pilot participants and complete pilot process.**
   a. The task force identified potential pilot participants from within their professional networks, aiming for diverse representation from all sectors, geographically, and by experience in the profession.
   b. Pilot participants were invited to take the survey in its entirety, providing specific feedback at the bottom of each survey page. The pilot yielded 34 completed responses.

7. **Finalize survey instrument.** Pilot feedback was reviewed and incorporated into the final survey instrument.

**Methods**

This section describes the survey’s structure, content, and approach as well as the recruitment strategy employed and procedure followed during the launch phase.

**Survey description**

The *Mapping the Landscape* survey instrument comprised a total pool of 66 items. Due to branching options, any given respondent answers only a subset of this total, based on their identification of priority competencies.

The survey incorporated items that spanned the following sections:

1. Background and setting
2. Continuing education/professional development (CE/PD) engagement
3. Continuing education/professional development (CE/PD) opportunities
4. Competency areas (in which respondents were asked to select specific competency areas critical to their work)
5. Critical competency areas:
   o Basic
   o Collections
   o Institutional Management
   o Technology
   o Leadership
   o Public-facing
6. Confidence (in which respondents were asked to indicate their confidence levels in the specific competency areas critical to their work)
7. Closing thoughts

The project team employed a multi-method approach to item construction by using open-ended qualitative items to supplement quantitatively-oriented items as appropriate.
Recruitment and sampling

A key goal for participant recruitment in this project was to obtain a representative sample of professionals within each of the archives, library, and museum sectors. This objective implied two closely related objectives: to ensure coverage in the recruitment effort across and within sectors (e.g., ensure geographic coverage), and to work towards a pool of respondents that reflect the makeup of each sector.

An initial constraint in the effort to achieve conventional objective representativeness was related to federal guidelines on confidentiality that place heightened requirements on projects with direct researcher access to subject demographic and contact information, including email addresses. This level of access would restrict some desired forms of data sharing.

A second constraint in determining statistical representativeness by conventional calculations is the lack of reliable data about the aggregate numbers of professionals in each sector.

Given these constraints, the project team adopted the following recruitment strategy:

- Members of the assessing the state of the field advisory board, the Mapping task force, and certain other key stakeholders identified key individuals across sectors (known as “distributors”), with whom they had personal relationships, and who were perceived to be well-placed institutional leaders to deliver survey invitations to professional in their local setting.
- The initial list of distributors was reviewed to ensure that sectors were fully represented in terms of areas of subspecialty as well as regional geographic location. Educopia worked with the advisory board and key individual leaders to address any gaps in coverage.
- Once a comprehensive list of distributors was recruited, the distributors received training and messaging language to implement when the survey went live.
- As described in the next section, during the survey’s live phase distributors sent out a standardized invitation message (as well as two follow-up reminders) to their network describing the purpose and benefits of the survey, and providing a link to take the survey itself.
- Survey participation was anonymous, preserving confidentiality.

This strategy had the advantage of ensuring representative coverage of the invitations to participate and leveraging positive network relationships to maximize response rates, while preserving anonymity.

For more information on the recruitment and sampling strategy used in this project, see Figure 2 as well as the Survey Procedures Guide section.
Survey timeline

Summary Survey Report Figure 2: Survey Timeline
Survey launch and messaging procedures

As Figure 2 illustrates, the survey’s live phase spanned 24 days, initiated by an introductory message relayed from the advisory board to the distributors, who in turn passed it on to their networks. Messaging for use in social media channels and newsletters was provided to the distributors for voluntary distribution. In addition, the Coalition, Educopia, and the advisory board members also posted social media messaging through their own channels.

Reminder messaging was similarly distributed at the mid-way mark, with a final reminder distributed four days prior to the close of the survey.

The content of the messaging followed best practice principles developed by Don A. Dillman (Dillman, D.A., et al. (2008). *Internet, Mail, and Mixed-Mode Surveys: The Tailored Design Method*. Wiley.). These principles included: making the invitation through an individual with whom the recipient (presumably) already has a positive professional relationship; making the value proposition of survey participation explicit; and the use of positive norming strategies.

Additional information on this project’s recruitment and sampling strategy used in this project is available in the following Survey Procedures Guide section.

Survey results

This section reviews survey performance and describes basic demographic characteristics of the respondents as well as patterns of sector representation observed. The bulk of this section displays selected cross-sector comparisons followed by item-by-item survey results for each sector.

Note that many of these results are also displayed in the data visualization dashboard that accompanies this Viewbook. In that interactive format, additional inquiries may be performed.

Survey performance

A total of 2,788 professionals across sectors participated in the survey. Of these, 2,778 identified themselves as working in the United States and its protectorates, and ten outside the United States. Geographic distribution of respondents, age, education level, professional experience and setting may be reviewed in the next section.

The systematic nation-wide coverage of institutions accomplished through the invitation strategy appears to have yielded a generally representative sample of participants across sectors. As noted above, the absence of reliable national-level data on the numbers and characteristics of professionals in these sectors, as well as the inaccessibility of information on the overall number of invitees to whom distributors sent the invitation, preclude traditional statistical benchmarking for sample validity at the individual level. However, strong responses from invited institutions lends *prima facie* support to consideration of this sample as representative at the institutional and geographic level. An examination

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38 See Survey Procedures Guide, Survey distribution email section
of geographic response patterns (Figure 8) and other demographic characteristics also suggest that the sample obtained through this administration of the survey is sufficiently representative for this exploratory study of professionals currently employed in a range of settings across the archives, library, and museum sectors.

**Interpretive notes**

Throughout the results section, the sectors identified in the respondent pool are identified in two ways:

1. **Original identified sectors.** Respondents are categorized according to their self-identified sector (archives, historical societies, libraries, or museums) or as "hybrid/other." When this methodology is used, the sector is labeled as "[Sector] Professionals."

2. **Sectors including hybrid professionals.** In addition to self-identified sector professionals, respondents that identified as "hybrid" and specified one or more sectors (archives, historical societies, libraries, or museums) are included within the sector(s) they specified. When this methodology is used, the sector is labeled as "[Sector]/Hybrid Professionals."

To view the original item language for the competencies items, use the Survey Glossary, page 190. The full survey instrument may be accessed on page 149.

**Participant and setting characteristics**

This section offers a graphic summary of key characteristics of survey respondents, including sector representation, geographic location, age, level of educational attainment, and years of experience. Following this individually-oriented demographic information, characteristics of the setting in which participants’ work are reported, including type of setting, organizational structure, sources of institutional funding, and employer contribution to CE/PD.
Sector representation

Summary Survey Report Figure 3: Respondents by Sector

Figure 3 displays the distribution of respondents by the sector in which their work primarily takes place. The darker bars for each sector indicate the number of respondents who selected that sector as their primary choice; the lighter "hybrid" segments show the number of respondents who selected "Other/Hybrid" and specified that sector in their open-ended response. "Hybrid" respondents (of which there were 255) may appear in more than one column (e.g., a respondent working as an archives professional and a library professional will be counted in the hybrid segment of both the archives and libraries columns).
Figure 4 displays the range of descriptions provided by those respondents who selected "Other/Hybrid" and specified a professional role outside of the archives, historical societies, libraries, or museums sectors.

Respondents who selected "Other/Hybrid" were asked to specify their primary professional role type in open-ended responses. Responses that mentioned role types outside the four primary sectors (archives, historical societies, libraries, and museums) fell into the "Other" category. These "Other" open-ended responses were coded into the top five most frequently occurring categories, shown above. In the figure above, responses could fall within two or more categories (e.g., a response of "Conservator in private practice" would be coded as "Independent, private practice, consultant" and "Conservation."
Respondent age, education, and years of experience in the profession

Summary Survey Report Figures 5-7: Survey respondent demographics
Summary Survey Report Figure 8: Geographic distribution of respondents by sector

Geographic Distribution of Respondents by Sector

Number of respondents

2016 Population
- 589,000 to 1,330,000
- 1,330,000 to 3,010,000
- 3,010,000 to 5,510,000
- 5,510,000 to 8,990,000
- 8,990,000 to 36,400,000

Legend:
- Library prof.
- Archives prof.
- Museum- Hist Soc. prof.
- Hybrid/Other prof.
Setting type

Respondents were asked to identify their immediate professional setting type - that is, in what kind of an organization or entity they were employed. Those who selected "Hybrid/Other" were asked to specify their immediate professional setting type. These open-ended responses were coded into the top six most frequently occurring categories, shown below. In the figure below, responses could fall within two or more categories (e.g., a response of "Academic Archives/ Library" would be coded as "Hybrid - 2+ sectors" and "University, educational.")
Setting size: number of employees
Respondents were asked whether their immediate professional settings were standalone organizations, or settings nested within a larger organization (for example, a museum located within a university or archives in a government agency). Slightly more than half of the respondents work in a nested setting within a larger organization (52%); the remaining 48% work in standalone organizations.

Employees in standalone organizations

Summary Survey Report Figure 11: Respondent setting by overall institution staffing level
Employees in nested setting

*Summary Survey Report Figure 12: Respondent setting by institutional unit staffing level*

<table>
<thead>
<tr>
<th>Total employees in immediate setting</th>
<th>Archives setting</th>
<th>Hist. Society setting</th>
<th>Library setting</th>
<th>Museum setting</th>
<th>Other setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 and fewer</td>
<td>79%</td>
<td>66%</td>
<td>39%</td>
<td>48%</td>
<td>63%</td>
</tr>
<tr>
<td>11-50</td>
<td>18%</td>
<td>27%</td>
<td>37%</td>
<td>37%</td>
<td>27%</td>
</tr>
<tr>
<td>51-100</td>
<td>2%</td>
<td>5%</td>
<td>10%</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>101-300</td>
<td>0%</td>
<td>9%</td>
<td>11%</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>301-1,000</td>
<td>0%</td>
<td>5%</td>
<td>3%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>1,001 and more</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Grand Total</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

n = 1,406

Employees in larger setting

*Summary Survey Report Figure 13: Respondents within larger institutions*

<table>
<thead>
<tr>
<th>Total employees in larger organization</th>
<th>Archives setting</th>
<th>Hist. Society setting</th>
<th>Library setting</th>
<th>Museum setting</th>
<th>Other setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 or fewer</td>
<td>41%</td>
<td>73%</td>
<td>23%</td>
<td>21%</td>
<td>28%</td>
</tr>
<tr>
<td>101-500</td>
<td>32%</td>
<td>18%</td>
<td>35%</td>
<td>30%</td>
<td>28%</td>
</tr>
<tr>
<td>501-1,000</td>
<td>7%</td>
<td>5%</td>
<td>8%</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>1,001-5,000</td>
<td>10%</td>
<td>5%</td>
<td>18%</td>
<td>16%</td>
<td>23%</td>
</tr>
<tr>
<td>5,001-10,000</td>
<td>3%</td>
<td>7%</td>
<td>9%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>10,000-25,000</td>
<td>6%</td>
<td>7%</td>
<td>11%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Grand Total</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

n = 1,398

Funding types by setting

*Summary Survey Report Figure 14: Respondents by organizational funding source*

<table>
<thead>
<tr>
<th>Funding types</th>
<th>Archives setting</th>
<th>Library setting</th>
<th>Museum setting</th>
<th>Hist. Society setting</th>
<th>Other setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-profit funding</td>
<td>17%</td>
<td>8%</td>
<td>62%</td>
<td>59%</td>
<td>27%</td>
</tr>
<tr>
<td>Academic funding</td>
<td>29%</td>
<td>25%</td>
<td>9%</td>
<td>1%</td>
<td>10%</td>
</tr>
<tr>
<td>Public funding</td>
<td>44%</td>
<td>63%</td>
<td>20%</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
<td>Corporate funding</td>
<td>6%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>11%</td>
</tr>
<tr>
<td>Other funding</td>
<td>4%</td>
<td>3%</td>
<td>8%</td>
<td>6%</td>
<td>19%</td>
</tr>
<tr>
<td>Grand Total</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

n = 2,593

Respondents were asked to provide the primary funding type for their immediate work setting. Figure 14 is arranged by respondent setting type.
Employer contribution for continuing education and professional development

Summary Survey Report Figure 15: Respondents by employer contribution level for CE/PD

Immediate setting

<table>
<thead>
<tr>
<th>Employer contribution to CE/PD (group)</th>
<th>Archives setting</th>
<th>Hist. Society setting</th>
<th>Library setting</th>
<th>Museum setting</th>
<th>Other setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than $10,000</td>
<td>1%</td>
<td>3%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>$7,501-$10,000</td>
<td>0%</td>
<td>1%</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>$5,001-$7,500</td>
<td>0%</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>$2,501-$5,000</td>
<td>8%</td>
<td>1%</td>
<td>13%</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Up to $2,500</td>
<td>67%</td>
<td>51%</td>
<td>62%</td>
<td>59%</td>
<td>51%</td>
</tr>
<tr>
<td>None</td>
<td>23%</td>
<td>45%</td>
<td>21%</td>
<td>27%</td>
<td>35%</td>
</tr>
<tr>
<td>Grand Total</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

n = 2,200

Respondents were asked to provide the approximate dollar amount that their employers contributed toward their own CE/PD costs over the past 12 months. Figure 15 is arranged by respondent setting type.

Participant perceptions and attitudes towards CE/PD

This section graphically depicts participant perceptions and attitudes towards CE/PD, including interest in CE/PD, reasons to seek out CE/PD, and identified factors that promote or discourage involvement in CE/PD.

Summary Survey Report Figure 16: Respondent level of CE/PD interest

Level of Interest in CE/PD
Low, 3%
Medium, 28%
High, 69%
n = 2,480
Most important factors, by sector:

- **Archives/Hybrid**: Other costs of attending CE/PD offerings, such as travel and lodging (91% said this was very or fairly important)
- **Libraries/Hybrid**: Other costs of attending CE/PD offerings such as travel and lodging (91% said this was very or fairly important)
- **Museums/Historical Societies/Hybrid**: Sector-specific topics (90% said this was very or fairly important)
- **Archives/Hybrid**: Instructor reputation (only 50% said this was very or fairly important)
- **Libraries/Hybrid**: Instructor reputation (only 56% said this was very or fairly important)
- **Museums/Historical Societies/Hybrid**: Option to engage virtually in CE/PD (only 44% said this was very or fairly important)
Taken as a whole, respondents were most likely to use in-person offerings (82%) followed by live virtual offerings (78%). Respondents were equally likely to use publications and online resources (77%), with 66% likely to use recorded offerings.
Respondents were asked to indicate which, if any, of the above factors would enable them to benefit more from CE/PD. Since multiple factors could be selected by each respondent, in Figure 18 a count of all responses is displayed.

**Sector-specific results on continuing education and professional development engagement**

The following pages provide results regarding CE/PD engagement that are broken out by each sector, including reasons for seeking CE/PD opportunities, as well as assets and barriers to engaging in CE/PD.

Figures 19-24 are aligned at the midpoint of the scale, so that positive responses are stacked to the left of the midline and neutral or negative responses are stacked to the right.
Summary Survey Report Figure 20: Reasons for seeking CE/PD reported by Archives/Hybrid respondents

Summary Survey Report Figure 21: CE/PD Assets and Barriers reported by Archives/Hybrid respondents
Summary Survey Report Figure 22: Reasons for seeking CE/PD reported by Libraries/Hybrid respondents

Summary Survey Report Figure 23: CE/PD Assets and Barriers reported by Libraries/Hybrid respondents
Summary Survey Report Figure 24: Reasons for seeking CE/PD reported by Museums/Historical Societies/Hybrid respondents

Summary Survey Report Figure 25: CE/PD Assets and Barriers reported by Museums/Historical Societies/Hybrid respondents
Cross-sector comparison - selected results

This section highlights selected cross-sector comparisons, such as competency self-rating by sector, self-rated confidence by specific competencies across sector, and themes for each competency domain that emerged from open-ended inquiry.

Summary Survey Report Figure 26: Critical competencies by field
Summary Survey Report Figure 27: Confidence levels in second-tier competency areas by field

- Collection development, acquisition
- Collection management, processing, cataloguing
- Community engagement, outreach
- Development, grants, fundraising
- Digital resources
- Direct patron services, reference
- Education
- Exhibitions
- Facility operations
- Financial management and budget
- IT services
- Planning, evaluation
- Project management
- Research
- Senior leadership
- Supervision and/or HR

Low: 0
Median: 1
High: 4

Archives/Hybrid Professionals
Libraries/Hybrid Professionals
Museums/Historical Societies/ Hybrid Professionals

5: Fully confident both within my role and in other sectors or settings
4: Fully confident within my role
3: Mostly confident within my role
2: Somewhat confident within my role
1: Minimally confident within my role
On the prior page, Figure 27 displays self-reported confidence in selected competency areas that respondents had previously indicated were related to their professional role on a regular basis. Respondents were asked to select the top three competency areas most critical to success in their roles. The above figure depicts the percent of sector respondents who selected a particular competency based on this criteria.

*Summary Survey Report Figure 28: Top level competency areas selected as critical by field respondents*

Respondents were asked to select the top three competency areas most critical to success in their roles. The above figure depicts the percent of sector respondents who selected a particular competency based on this criteria.

*Summary Survey Report Figure 29: Composite top level competency scores*
In Figure 29, a composite competency score was calculated to yield overall competency ratings for each of the six competency areas.

**Note: Here, higher scores indicate lower competency ratings.** A score of “1” corresponds with having the knowledge and skills for success in the area. A score of “2” corresponds with needing minor improvement to have the knowledge and skills for success in the area. A score of “3” corresponds with needing significant improvement to have the knowledge and skills for success in the area.

**Thoughts on professional development needs by competency areas**

At the close of each competency area in the survey, respondents were presented with opportunities for open-ended comment. The following figures summarize comments from each competency area for the following items:

"Please share any thoughts you have about CE/PD needs in the area of ___________ competencies."

In a qualitative coding process, theme sets were developed for each competency area, aligning common themes where appropriate. See the *Methods* section above for more information about this qualitative coding process.

**Highlighted quotes: thoughts on basic competencies**

"Working with intergenerational groups that incorporate millennials and older generations really could use some focused training - there’s a real divide in my institution in this area, and not much acknowledgement of that fact."

"Learning how to manage volunteers and interns more effectively and how to navigate office/institutional politics and institutional relationships."

"The history of the profession and how we got the ethics we maintain is something almost universally absent from training in all new hires at my organization. The result: avoidable disasters."
"In any profession people usually have to deal with difficult co-workers, so that is a competency most people can use help with."

"Even though I have attended trainings on topics in the collaboration section above, I feel these trainings would be much more helpful if I attended them with other members of my team so that we could learn about each other's work styles and how our team works together."

Highlighted quotes: thoughts on collections competencies

"The biggest issue I've had to address/adapt to at my current employer is the issue of cultural sensitivities and the collision of ethics, copyright, and access in this area."

"I need to know more about linked data technology, LRM, and other new models and technologies which will cut across print and digital collections."

"Generally, CE/PD's in collections competencies are usually all similar in presentation and material. It would be nice to have a wider variety of CE/PD's."

"There need to be more advanced training in this area - so many of the workshop I've attended have been for beginners and were too basic. I need in-depth case studies and detailed plans for implementation and lists of concepts to consider in planning."

"Changing technologies make it difficult to keep up on the latest ones. This is where networking is extremely helpful."

"Increase availability of opportunities, especially at conferences. Additional funding would also be helpful."
Highlighted quotes: thoughts on institutional management competencies

"More "real world" case studies would be helpful to all levels of museum professionals."

"There is little C/E for new directors who have not worked their way up through that organization. Specifically regarding state laws and required state-by-state reporting. Human Resources, OSHA, Labor law."

"With regards to this topic, I need strategies to successfully engage others in my institution. It's an uphill battle to get some in Leadership to put plans, accreditation guidelines, etc. as a top priority."

"Often managers are hired for their knowledge of a particular area, but don't have the personnel management skills required to manage effectively."

"Working more effectively with library board, including getting them to help with fundraising, development of a foundation. Budgeting - persuasion techniques (writing, speaking) to advocate for budgets; learning more budgeting techniques."

"There are basic business/finance management class opportunities, but not as much for not for profit, museum-specific business management."

"In a large institution it is often hard to break through the silos. Communication is difficult. CE/PD relating to larger management issues would help."

"Finding myself as an ED of a small museum, I am suddenly thrust into the areas of HR and finance and, while I understand the importance of getting these areas 'right' (i.e., compliant, efficient, etc.), resources for support are both limited and expensive. State based free resources are really needed in these areas."
Highlighted quotes: thoughts on technology competencies

"The technology changes so quickly that the foundation I got in graduate school (four years ago) is barely relevant anymore. Workshops on technological updates (like a "best of new technologies") at a CE/PD would be much appreciated!"

"Experiences geared toward staff who are not technology professionals but have to deal with technology because it happens to be one of the many hats they have to wear, would be helpful."

"I am in an EXTREMELY tech literate position. The majority of the C/Es offered for me are VERY low level and not applicable."

"Digital is ubiquitous. However, there needs to be a raised awareness that analog materials are not automatically irrelevant and obsolete. I would suggest that this awareness be part and parcel of every workshop on the latest and greatest technology competency. ...."

"Conversations are needed for people in this area. Open conversations around topics, not passive presentations. Hands on learning. Apprenticeships. As someone who self-taught herself her job and skillsets, and went looking for help, having CE/PD opportunities where these open conversations could happen, and have mentors available would have really been helpful."

"More education is needed in the area of knowledge management. If libraries spent more time managing the knowledge of its workers, they would be better prepared to address issues as they arise as well as be more innovative."
Highlighted quotes: thoughts on leadership competencies

"We need to move out of specific library/museum/archive leadership and take our lead from private sector businesses and nonprofits that are already doing a lot of these things."

"Often PD opportunities in this area are for senior management and directors, but not for middle management."

"Managing/leading up and to the side is just as challenging as managing down. I feel fairly competent in managing down; I don't feel so competent in managing/leading up and to the side."

"Leadership skills can be difficult to acquire, because skills need to be practiced and incorporated into everyday activities. Coaching, one-on-one interaction, and mentoring are important in the process. Many organizations want leaders, but do not know how to help employees develop those skills."

"General leadership training would be helpful, especially in regards to how to handle individuals that resist change."

"I feel that although I have many of the basic skills needed, I need CE/PD regarding using existing and emerging technology to enhance what I already know and to do it more efficiently, effectively and consistently. I would want to learn how to use websites, online training, data about collections, outreach, staff performance, etc. for planning, budgeting and training, etc."

"There is inability to discern or to have meaningful discussion between fad and sustainable change. Directors are often motivated by novelties either in management and organization or in services. They often make changes for change sake and present these as a sign of progress, rather than make change for targeted, strategically meaningful and sustainable growth. They often ignore the past and end up going nowhere."
Highlighted quotes: Thoughts on public-facing competencies CE/PD

"Ensuring the library's community relevance is often difficult. Cooperation amongst community agencies is not well established; services are not shared or optimized."

"I've found that most people believe they know what they're doing, and they have a hard time admitting that they need training (especially docents/frontline staff who've been doing this for years). But when they are (re)introduced to the basics, it changes their perception of what and how they do their job."

"This is so so so important to keep our institutions relevant. So many archives are inwardly focused because of the precious things they hold but we need to find ways to create positive experiences with the public so that we remain a part of the community."

"Small museums always need to be up to date on this, especially if the changing nature of a small museum in a small community. It's tough with a small staff to be a museum and a public institution of culture, community, and meeting space."

"Given the complexities of our culture today, I think this is an area that can always use at least some additional training - the challenge is keeping current amidst all the other everyday duties that need to be fulfilled. Learning how to carve out reflective time to really do some of these things can be difficult."
Archives/hybrid professional results

Basic competencies—Archives

This section reports on participants from the archives sector; not only those who solely identified with this sector but also those who identify with this sector and at least one other sector or specialty (hybrid professionals). To review the full item text, refer to the Survey to Competency Crosswalk section of the Survey Interpretation Guide section below.

To compare these results to those of other sectors, refer to Libraries and Museums/Historical Societies.

Items regarding basic competencies were presented to all respondents.

Summary Survey Report Figure 36: Archives respondents’ research and project management level of need

Summary Survey Report Figure 37: Archives respondents’ communication and collaboration level of need
Summary Survey Report Figure 38: Archives respondents’ professional ethics level of need

Summary Survey Report Figure 39: Archives respondents’ profession awareness level of need
Collections competencies—Archives

Summary Survey Report Figure 40: Archives respondents’ collection development level of need

Summary Survey Report Figure 41: Archives respondents’ physical collection management level of need
**Summary Survey Report Figure 42: Archives respondents' physical preservation level of need**

**Physical Preservation Principles and Skills**

- Not relevant to role: 8%
- Need significant improvement: 31%
- Need minor improvement: 17%
- Have knowledge/skills for success: 42%

**Summary Survey Report Figure 43: Archives respondents' digital collection management level of need**

**Digital Collection Management**

- Not relevant to role: 10%
- Need significant improvement: 43%
- Need minor improvement: 18%
- Have knowledge/skills for success: 30%

**Summary Survey Report Figure 44: Archives respondents' digital preservation level of need**

**Digital Preservation Principles and Skills**

- Not relevant to role: 10%
- Need significant improvement: 20%
- Need minor improvement: 35%
- Have knowledge/skills for success: 34%
Institutional management competencies—Archives

Summary Survey Report Figure 45: Archives respondents’ supervisory level of need
Supervision and Human Resources

Summary Survey Report Figure 46: Archives respondents organizational planning level of need
Organizational Planning, Policies, and Procedures

Summary Survey Report Figure 47: Archives respondents’ facility design and management level of need
Facility Design and Management
Summary Survey Report Figure 48: Archives respondents’ institutional affiliation and financial management level of need

Summary Survey Report Figure 49: Archives respondents’ core technology level of need

Summary Survey Report Figure 50: Archives respondents’ intermediate/advanced technology level of need
Leadership competencies—Archives

Summary Survey Report Figure 51: Archives respondents’ planning and decision-making level of need

Planning and Making Effective Decisions

<table>
<thead>
<tr>
<th>Category</th>
<th>1%</th>
<th>8%</th>
<th>13%</th>
<th>8%</th>
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<th>4%</th>
<th>7%</th>
<th>3%</th>
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</thead>
<tbody>
<tr>
<td>Short-term/long-term planning</td>
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<tr>
<td>Identify clear outcomes</td>
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<tr>
<td>Evidence-based decision making</td>
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<tr>
<td>Responsibility for decisions</td>
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<tr>
<td>Decisional transparency</td>
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Summary Survey Report Figure 52: Archives respondents’ flexible and reflective thinking level of need

Flexible and Reflective Thinking

<table>
<thead>
<tr>
<th>Category</th>
<th>1%</th>
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<th>4%</th>
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<th>2%</th>
<th>13%</th>
<th>8%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Innovative thinking about mission and goals</td>
<td></td>
<td></td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Assess organizational shortcomings/assets</td>
<td></td>
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<tr>
<td>Continuous improvement</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consider impact in community and beyond</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Impactful ideas, environments, technologies</td>
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<td></td>
<td></td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Anticipate problems/opportunities</td>
<td></td>
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</table>

Data Reports and Analysis | Summary Survey Report — Archives Results
Summary Survey Report Figure 53: Archives respondents’ engagement, motivation, and inspiration level of need

Summary Survey Report Figure 54: Archives respondents’ change management level of need
Self-Identified Library, Archives, and Museum Professional Development Needs

Summary Survey Report Figure 55: Archives respondents’ cultural competency level of need

Public-facing competencies—Archives

Summary Survey Report Figure 56: Archives respondents’ patron service level of need
Summary Survey Report Figure 57: Archives respondents’ patron education and training level of need

Summary Survey Report Figure 58: Archives respondents’ community relations level of need
Libraries/hybrid professional results

Basic competencies—Libraries

This section reports on participants from the library sector; not only those who solely identified with this sector but also those who identify with this sector and at least one other sector or specialty (hybrid professionals). To review the full item text, refer to the Survey to Competency Crosswalk section of the Survey Interpretation Guide section below.

To compare these results to those of other sectors, refer to the Archives and Museums/Historical Societies results sections.

Items regarding basic competencies were presented to all respondents.

Summary Survey Report Figure 59: Library respondents’ research and project management level of need

Summary Survey Report Figure 60: Library respondents’ communication and collaboration level of need
**Summary Survey Report Figure 61: Library respondents’ professional ethics level of need**

![Professional Ethics Graph](image)

**Summary Survey Report Figure 62: Library respondents’ profession awareness level of need**

![Awareness of Professional Context Graph](image)

**Collections competencies—Libraries**

The focus of the following sections is on the level of skill in competency areas that were reported by professionals in the archives sector as critical to success in their role. For the following competency areas (collections, institutional management, leadership, public facing) respondents were asked to identify the top three areas most critical to their roles, and were presented with only those items corresponding to their top three areas.
Summary Survey Report Figure 63: Library respondents' collection development level of need

Summary Survey Report Figure 64: Library respondents' physical collection management level of need

Summary Survey Report Figure 65: Library respondents' physical preservation level of need
**Summary Survey Report Figure 66: Library respondents’ digital collection management level of need**

![Digital Collection Management Chart]

**Summary Survey Report Figure 67: Library respondents’ digital preservation level of need**

![Digital Preservation Principles and Skills Chart]
Institutional management competencies—Libraries

*Summary Survey Report Figure 68: Library respondents’ supervisory level of need*

**Supervision and Human Resources**

<table>
<thead>
<tr>
<th>Category</th>
<th>Not relevant to role</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Have knowledge/skills for success</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruitment, selection of workers</td>
<td>9%</td>
<td>7%</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>Lead, empower employee</td>
<td>3%</td>
<td>9%</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>Performance management strategies</td>
<td>5%</td>
<td>16%</td>
<td>20%</td>
<td>12%</td>
</tr>
<tr>
<td>Performance management standards, requirements</td>
<td>8%</td>
<td>20%</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>Work with consultants, volunteers</td>
<td>12%</td>
<td>7%</td>
<td>12%</td>
<td>8%</td>
</tr>
<tr>
<td>Support staff career development</td>
<td>8%</td>
<td>12%</td>
<td>8%</td>
<td>12%</td>
</tr>
</tbody>
</table>

*Summary Survey Report Figure 69: Library respondents organizational planning level of need*

**Organizational Planning, Policies, and Procedures**

<table>
<thead>
<tr>
<th>Category</th>
<th>Not relevant to role</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Have knowledge/skills for success</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand laws</td>
<td>5%</td>
<td>36%</td>
<td>45%</td>
<td>46%</td>
</tr>
<tr>
<td>Policies/procedures</td>
<td>4%</td>
<td>45%</td>
<td>49%</td>
<td>41%</td>
</tr>
<tr>
<td>Strategic planning</td>
<td>15%</td>
<td>4%</td>
<td>16%</td>
<td>9%</td>
</tr>
</tbody>
</table>

*Summary Survey Report Figure 70: Library respondents’ facility design and management level of need*

**Facility Design and Management**

<table>
<thead>
<tr>
<th>Category</th>
<th>Not relevant to role</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Have knowledge/skills for success</th>
</tr>
</thead>
<tbody>
<tr>
<td>Encourage patron use</td>
<td>14%</td>
<td>16%</td>
<td>18%</td>
<td>10%</td>
</tr>
<tr>
<td>Safe environment</td>
<td>10%</td>
<td>16%</td>
<td>18%</td>
<td>14%</td>
</tr>
<tr>
<td>Well-run environment</td>
<td>15%</td>
<td>9%</td>
<td>16%</td>
<td>47%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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<td>48%</td>
</tr>
</tbody>
</table>
Summary Survey Report Figure 71: Library respondents’ institutional affiliation and financial management level of need

Summary Survey Report Figure 72: Library respondents’ core technology level of need

Summary Survey Report Figure 73: Library respondents’ intermediate/advanced technology level of need
Leadership competencies—Libraries

Summary Survey Report Figure 74: Library respondents' planning and decision-making level of need

Planning and Making Effective Decisions

<table>
<thead>
<tr>
<th>Planning and Making Effective Decisions</th>
<th>0%</th>
<th>25%</th>
<th>50%</th>
<th>75%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short-term/long-term planning</td>
<td>1%</td>
<td>45%</td>
<td>39%</td>
<td>1%</td>
<td>16%</td>
</tr>
<tr>
<td>Identify clear outcomes</td>
<td>1%</td>
<td>47%</td>
<td>37%</td>
<td>23%</td>
<td>15%</td>
</tr>
<tr>
<td>Evidence-based decision making</td>
<td>2%</td>
<td>47%</td>
<td>28%</td>
<td>60%</td>
<td>3%</td>
</tr>
<tr>
<td>Responsibility for decisions</td>
<td>3%</td>
<td>31%</td>
<td>60%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Decision transparency</td>
<td>2%</td>
<td>30%</td>
<td>55%</td>
<td>2%</td>
<td>1%</td>
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</table>

Summary Survey Report Figure 75: Library respondents' flexible and reflective thinking level of need

Flexible and Reflective Thinking

<table>
<thead>
<tr>
<th>Flexible and Reflective Thinking</th>
<th>0%</th>
<th>25%</th>
<th>50%</th>
<th>75%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Innovative thinking about mission and goals</td>
<td>2%</td>
<td>10%</td>
<td>42%</td>
<td>46%</td>
<td>1%</td>
</tr>
<tr>
<td>Assess organizational shortcomings/assets</td>
<td>1%</td>
<td>23%</td>
<td>21%</td>
<td>34%</td>
<td>14%</td>
</tr>
<tr>
<td>Continuous improvement</td>
<td>1%</td>
<td>14%</td>
<td>44%</td>
<td>41%</td>
<td>2%</td>
</tr>
<tr>
<td>Consider impact in community and beyond</td>
<td>2%</td>
<td>16%</td>
<td>44%</td>
<td>39%</td>
<td>2%</td>
</tr>
<tr>
<td>Impactful ideas, environments, technologies</td>
<td>2%</td>
<td>20%</td>
<td>47%</td>
<td>31%</td>
<td>1%</td>
</tr>
<tr>
<td>Anticipate problems/opportunities</td>
<td>1%</td>
<td>15%</td>
<td>45%</td>
<td>39%</td>
<td>1%</td>
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</tbody>
</table>

Summary Survey Report Figure 76: Library respondents' engagement, motivation, and inspiration level of need

Engaging, Motivating, and Inspiring

<table>
<thead>
<tr>
<th>Engaging, Motivating, and Inspiring</th>
<th>0%</th>
<th>25%</th>
<th>50%</th>
<th>75%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motivate individuals to contribute</td>
<td>3%</td>
<td>41%</td>
<td>43%</td>
<td>41%</td>
<td>13%</td>
</tr>
<tr>
<td>Environment of trust and integrity</td>
<td>2%</td>
<td>36%</td>
<td>43%</td>
<td>41%</td>
<td>7%</td>
</tr>
<tr>
<td>Inspire others to think creatively</td>
<td>1%</td>
<td>41%</td>
<td>41%</td>
<td>41%</td>
<td>1%</td>
</tr>
<tr>
<td>Environment of active communication</td>
<td>1%</td>
<td>48%</td>
<td>40%</td>
<td>40%</td>
<td>1%</td>
</tr>
<tr>
<td>Constructive feedback</td>
<td>1%</td>
<td>42%</td>
<td>42%</td>
<td>42%</td>
<td>12%</td>
</tr>
</tbody>
</table>
Summary Survey Report Figure 77: Library respondents’ change management level of need

Summary Survey Report Figure 78: Library respondents’ cultural competency level of need
Public-facing competencies—Libraries

Summary Survey Report Figure 79: Library respondents’ patron service level of need

Summary Survey Report Figure 80: Library respondents’ patron education and training level of need

Summary Survey Report Figure 81: Library respondents’ community relations level of need
Museums/historical societies/hybrid professional results

Basic competencies—Museums/Historical Societies

This section reports on participants from the museums and historical societies sectors; not only those who solely identified with these two sectors but those who identify with one of these and at least one other sector or specialty as well (hybrid professionals). To review the full item text, refer to the Survey to Competency Crosswalk section of the Survey Interpretation Guide section below.

To compare these results to those of other sectors, refer to the Archives and Libraries sections.

Items regarding basic competencies were presented to all respondents.

Summary Survey Report Figure 82: Museum/Historical Society respondents’ research and project management level of need

Summary Survey Report Figure 83: Museum/Historical Society respondents’ communication and collaboration level of need
Summary Survey Report Figure 84: Museum/Historical Society respondents’ professional ethics level of need

Summary Survey Report Figure 85: Museum/Historical Society respondents’ profession awareness level of need
Collections competencies—Museums/Historical Societies

The focus of the following sections is on the level of skill in competency areas that were reported by professionals in the archives sector as critical to success in their role. For the following competency areas (collections, institutional management, leadership, public facing) respondents were asked to identify the top three areas most critical to their roles, and were presented with only those items corresponding to their top three areas.

*Summary Survey Report Figure 86: Museum/Historical Society respondents’ collection development level of need*
Summary Survey Report Figure 87: Museum/Historical Society respondents’ physical collection management level of need

Summary Survey Report Figure 88: Museum/Historical Society respondents’ physical preservation level of need

Summary Survey Report Figure 89: Museum/Historical Society respondents’ digital collection management level of need
Summary Survey Report Figure 90: Museum/Historical Society respondents’ digital preservation level of need

Digital Collection Management

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Have knowledge/skills for success</th>
<th>Not relevant to role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital resources</td>
<td>14%</td>
<td>0%</td>
<td>5%</td>
<td>29%</td>
</tr>
<tr>
<td>Organize digital collections</td>
<td>17%</td>
<td>0%</td>
<td>7%</td>
<td>25%</td>
</tr>
<tr>
<td>Control/access to digital collections</td>
<td>24%</td>
<td>0%</td>
<td>9%</td>
<td>28%</td>
</tr>
<tr>
<td>Digital curation software</td>
<td>22%</td>
<td>0%</td>
<td>9%</td>
<td>32%</td>
</tr>
<tr>
<td>Integrate tools into workflow</td>
<td>23%</td>
<td>0%</td>
<td>7%</td>
<td>33%</td>
</tr>
<tr>
<td>Sustain digital collections over time</td>
<td>26%</td>
<td>0%</td>
<td>6%</td>
<td>30%</td>
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</table>

Digital Preservation Principles and Skills

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Have knowledge/skills for success</th>
<th>Not relevant to role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preservation/conservation of digital materials</td>
<td>31%</td>
<td>31%</td>
<td>12%</td>
<td>5%</td>
</tr>
<tr>
<td>Ensure digital protection, authentication of collections</td>
<td>31%</td>
<td>34%</td>
<td>26%</td>
<td>5%</td>
</tr>
<tr>
<td>Policies and procedures for digitization</td>
<td>29%</td>
<td>39%</td>
<td>25%</td>
<td>5%</td>
</tr>
<tr>
<td>Policies and procedures for born digital materials</td>
<td>26%</td>
<td>39%</td>
<td>25%</td>
<td>5%</td>
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</table>
Institutional management competencies—Museums/Historical Societies

*Summary Survey Report Figure 91: Museum/Historical Society respondents’ supervisory level of need*

**Supervision and Human Resources**

<table>
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<tr>
<th>Supervision and Human Resources</th>
<th>Supervisory Level of Need</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruitment/selection of workforce</td>
<td>11% Not relevant to role, 10% Need significant improvement, 9% Need minor improvement, 6% Have knowledge/skills for success</td>
</tr>
<tr>
<td>Lead, empower employees</td>
<td>41% Not relevant to role, 18% Need significant improvement, 13% Need minor improvement, 6% Have knowledge/skills for success</td>
</tr>
<tr>
<td>Performance management strategies</td>
<td>22% Not relevant to role, 18% Need significant improvement, 15% Need minor improvement, 6% Have knowledge/skills for success</td>
</tr>
<tr>
<td>Performance management standards, requirements</td>
<td>38% Not relevant to role, 24% Need significant improvement, 15% Need minor improvement, 6% Have knowledge/skills for success</td>
</tr>
<tr>
<td>Work with consultants, volunteers</td>
<td>51% Not relevant to role, 41% Need significant improvement, 18% Need minor improvement, 6% Have knowledge/skills for success</td>
</tr>
<tr>
<td>Support staff career development</td>
<td>35% Not relevant to role, 43% Need significant improvement, 45% Need minor improvement, 6% Have knowledge/skills for success</td>
</tr>
</tbody>
</table>

*Summary Survey Report Figure 92: Museum/Historical Society respondents organizational planning level of need*

**Organizational Planning, Policies, and Procedures**

| Organizational Planning, Policies, and Procedures | Organizational Planning Level of Need |
|-----------------------------------------------------------------------------------------------------------------|
| Understand laws | 25% Not relevant to role, 46% Need significant improvement, 43% Need minor improvement, 6% Have knowledge/skills for success |
| Policies/procedures | 39% Not relevant to role, 43% Need significant improvement, 41% Need minor improvement, 6% Have knowledge/skills for success |
| Strategic planning | 36% Not relevant to role, 42% Need significant improvement, 41% Need minor improvement, 6% Have knowledge/skills for success |
Summary Survey Report Figure 93: Museum/Historical Society respondents’ facility design and management level of need

Facility Design and Management

- Not relevant to role
- Need significant improvement
- Need minor improvement
- Have knowledge/skills for success

Summary Survey Report Figure 94: Museum/Historical Society respondents’ institutional affiliation and financial management level of need

Institutional Affiliations and Financial Management

- Not relevant to role
- Need significant improvement
- Need minor improvement
- Have knowledge/skills for success
Technology competencies—Museums/Historical Societies

Summary Survey Report Figure 95: Museum/Historical Society respondents' core technology level of need

Summary Survey Report Figure 96: Museum/Historical Society respondents' intermediate/advanced technology level of need
Leadership competencies—Museums/Historical Societies

Summary Survey Report Figure 97: Museum/Historical Society respondents’ planning and decision-making level of need

Planning and Making Effective Decisions

- Not relevant to role
- Need significant improvement
- Need minor improvement
- Have knowledge/skills for success

<table>
<thead>
<tr>
<th>Planning and Making Effective Decisions</th>
<th>0%</th>
<th>25%</th>
<th>50%</th>
<th>75%</th>
<th>100%</th>
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</thead>
<tbody>
<tr>
<td>Short-term/long-term planning</td>
<td>12%</td>
<td>47%</td>
<td>40%</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>Identify clear outcomes</td>
<td>12%</td>
<td>45%</td>
<td>42%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Evidence-based decision making</td>
<td>23%</td>
<td>48%</td>
<td>26%</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Responsibility for decisions</td>
<td>6%</td>
<td>31%</td>
<td>60%</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>Decisoral transparency</td>
<td>5%</td>
<td>37%</td>
<td>57%</td>
<td>1%</td>
<td></td>
</tr>
</tbody>
</table>

Summary Survey Report Figure 98: Museum/Historical Society respondents’ flexible and reflective thinking level of need

Flexible and Reflective Thinking

- Not relevant to role
- Need significant improvement
- Need minor improvement
- Have knowledge/skills for success

<table>
<thead>
<tr>
<th>Flexible and Reflective Thinking</th>
<th>0%</th>
<th>25%</th>
<th>50%</th>
<th>75%</th>
<th>100%</th>
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</thead>
<tbody>
<tr>
<td>Innovative thinking about mission and goals</td>
<td>1%</td>
<td>8%</td>
<td>41%</td>
<td>50%</td>
<td></td>
</tr>
<tr>
<td>Assess organizational shortcomings/assets</td>
<td>19%</td>
<td>22%</td>
<td>48%</td>
<td>60%</td>
<td></td>
</tr>
<tr>
<td>Continuous improvement</td>
<td>11%</td>
<td>30%</td>
<td>40%</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>Consider impact in community and beyond</td>
<td>16%</td>
<td>42%</td>
<td>39%</td>
<td>40%</td>
<td></td>
</tr>
<tr>
<td>Impactful ideas, environments, technologies</td>
<td>22%</td>
<td>48%</td>
<td>23%</td>
<td>47%</td>
<td></td>
</tr>
<tr>
<td>Anticipate problems/opportunities</td>
<td>3%</td>
<td>12%</td>
<td>47%</td>
<td>1%</td>
<td></td>
</tr>
</tbody>
</table>
Summary Survey Report Figure 99: Museum/Historical Society respondents’ engagement, motivation, and inspiration level of need

Summary Survey Report Figure 100: Museum/Historical Society respondents’ change management level of need

Summary Survey Report Figure 101: Museum/Historical Society respondents’ cultural competency level of need
Public-facing competencies—Museums/Historical Societies

Summary Survey Report Figure 102: Museum/Historical Society respondents’ patron service level of need

Patron Services and Access

<table>
<thead>
<tr>
<th></th>
<th>Respond to patron research needs</th>
<th>Use online tools/communities for user engagement</th>
<th>Outreach services</th>
<th>Opportunities for information, education, entertainment, lifelong learning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not relevant to role</td>
<td>7%</td>
<td>20%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Need significant improvement</td>
<td>20%</td>
<td>37%</td>
<td>42%</td>
<td>16%</td>
</tr>
<tr>
<td>Need minor improvement</td>
<td>49%</td>
<td>27%</td>
<td>19%</td>
<td>16%</td>
</tr>
<tr>
<td>Have knowledge/skills for success</td>
<td>29%</td>
<td>37%</td>
<td>42%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Summary Survey Report Figure 103: Museum/Historical Society respondents’ patron education and training level of need

Education and Training

<table>
<thead>
<tr>
<th></th>
<th>Educational/training/interpretation programs</th>
<th>Public access technology</th>
<th>Publications/other information</th>
<th>Patron training</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not relevant to role</td>
<td>15%</td>
<td>12%</td>
<td>21%</td>
<td>35%</td>
</tr>
<tr>
<td>Need significant improvement</td>
<td>31%</td>
<td>44%</td>
<td>25%</td>
<td>13%</td>
</tr>
<tr>
<td>Need minor improvement</td>
<td>42%</td>
<td>15%</td>
<td>30%</td>
<td>25%</td>
</tr>
<tr>
<td>Have knowledge/skills for success</td>
<td>16%</td>
<td>25%</td>
<td>30%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Summary Survey Report Figure 104: Museum/Historical Society respondents’ community relations level of need

Community Relations and Outreach

<table>
<thead>
<tr>
<th></th>
<th>Demonstrate value of institution through evaluation</th>
<th>Build support for institution</th>
<th>Communication, marketing, promotion of institution</th>
<th>Relationships with community organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not relevant to role</td>
<td>12%</td>
<td>21%</td>
<td>11%</td>
<td>12%</td>
</tr>
<tr>
<td>Need significant improvement</td>
<td>21%</td>
<td>19%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Need minor improvement</td>
<td>40%</td>
<td>43%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Have knowledge/skills for success</td>
<td>27%</td>
<td>27%</td>
<td>31%</td>
<td>38%</td>
</tr>
</tbody>
</table>
Additional explorative analyses

The results in the competencies section were presented in a sector-by-sector format; however, for some stakeholders in this project, it may be useful to consider certain follow-up questions, such as the overall areas of greatest need (as identified by respondents) within each sector and determine where commonalities may arise.

Overall greatest identified needs

*Summary Survey Report Figure 105: Competencies with greatest need by field*

<table>
<thead>
<tr>
<th>Area</th>
<th>Competency</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collections</td>
<td>Develop tools and systems that provide optimal control of and access to digital collections</td>
<td>78% in need of improvement (30% minor, 48% significant)</td>
</tr>
<tr>
<td>Libraries/Hybrid</td>
<td>Build internal and external support for change</td>
<td>71% in need of improvement (53% minor, 18% significant)</td>
</tr>
<tr>
<td>Museums/History</td>
<td>Build internal and external support for change</td>
<td>72% in need of improvement (51% minor, 21% significant)</td>
</tr>
</tbody>
</table>

The table above indicates the overall greatest need within each sector (as defined by the highest percentage of respondents indicating they need "minor" or "significant" improvement in a competency.)
Most significant identified needs

Summary Survey Report Figure 106: Competencies with most significant need by field

<table>
<thead>
<tr>
<th>Area</th>
<th>Competency</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Self-Identified Library</strong></td>
<td><strong>Collections</strong> Integrates different tools into workflows, selecting and implementing appropriate curation tools to manage digital resources</td>
<td>51% in need of significant improvement</td>
</tr>
<tr>
<td><strong>Archives-Hybrid Professional</strong></td>
<td><strong>Collections</strong> Integrates different tools into workflows, selecting and implementing appropriate curation tools to manage digital resources</td>
<td>38% in need of significant improvement</td>
</tr>
<tr>
<td><strong>Libraries-Hybrid Professional</strong></td>
<td><strong>Collections</strong> [Tied] Integrates different tools into workflows, selecting and implementing appropriate curation tools to manage digital resources</td>
<td>41% in need of significant improvement</td>
</tr>
<tr>
<td><strong>Museums/Hist. Soc. Hybrid Professional</strong></td>
<td><strong>Collections</strong> [Tied] Sustain and improve digital collections over time</td>
<td>41% in need of significant improvement</td>
</tr>
</tbody>
</table>

The table above indicates the most significant need within each sector, as defined by the highest percentage of respondents indicating they need “significant” improvement in a competency.

To explore these results in more depth, see the exploratory Heatmaps within the Survey Data Visualizations section below.
Crosstab: years in profession and factors increasing professional development benefit

The table below explores the relationship between years in the profession and factors that were perceived to increase benefit from CE/PD. Respondents were asked to select all of the factors that "would enable [them] to benefit more from CE/PD" from a list.

Summary Survey Report Figure 107: Professional development benefit factors by years in profession

<table>
<thead>
<tr>
<th>Years in profession</th>
<th>Less than 6 years</th>
<th>6-15 years</th>
<th>16-25 years</th>
<th>More than 25 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>More inexpensive CE/PD opportunities/scholarships</td>
<td>31%</td>
<td>28%</td>
<td>27%</td>
<td>22%</td>
</tr>
<tr>
<td>More frequent opportunities</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>More in-person CE/PD</td>
<td>9%</td>
<td>10%</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>More live virtual opportunities</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>11%</td>
</tr>
<tr>
<td>More online resources</td>
<td>20%</td>
<td>21%</td>
<td>22%</td>
<td>26%</td>
</tr>
<tr>
<td>More publications</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Topics more relevant to my level</td>
<td>10%</td>
<td>10%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Topics more relevant to my role</td>
<td>9%</td>
<td>11%</td>
<td>10%</td>
<td>11%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

N (# of selections made by each cohort) | 1,969 | 3,902 | 2,498 | 1,693 |

First, the similarity of percentages across cohort is notable - all within a few percentage points for most factors. Also of note, the greatest difference seen was regarding the need for more inexpensive CE/PD opportunities, with nearly one-third of all selections made by the "less than six years" cohort referencing this factor. This was higher than all other cohorts, with the sharpest contrast being the "more than 25 years" cohort at only 22%.

Assets and barriers to professional development and related competency gaps

The survey asked participants to self-rate the degree to which a gap existed between the requirements of their position, and their own competency in meeting those requirements. In addition to identifying the extent to which professional competency gaps exist across sectors and roles, an additional analysis was undertaken to offer context to these findings. Specifically, a series of heatmaps, found in pgs. 84-90, and in thumbnail below) shows the relationship between the assets and barriers experienced in the work setting with respect to accessing CE/PD and self-rated competency.

The results of these analyses are too complex to easily narratively summarize; however, they bear close inspection as several intriguing patterns emerge. For instance, while self-ratings in the area of basic competencies are generally positive (skewing toward the “I have necessary skills” end of the rating scale)
Prevalence of hybrid, other sector, and multi-setting professionals

A notable set of findings in this study is the (perhaps) surprising number of respondents who identified as belonging to more than one sector, and/or work in more than one type of setting. Specifically, Figure 3 indicates that 21 percent of respondents identified with either more than one sector ("hybrid"), or a different sector than those listed ("other"). Figure 4 breaks these hybrid respondents down by category. Moreover, Figure 8 reports that fully 15 percent of respondents work in hybrid/other settings, that is, not in classically defined archives, library or museum venues.

It is likely that there is a great deal of overlap between individuals reporting themselves as hybrid professionals and those reporting their workplace in non-traditional terms. Given the Coalition’s mandate to facilitate cross-sector collaboration, the presence of a significant number of professionals who already see themselves in cross-sector or non-traditional terms bears further scrutiny. In addition to better understanding the unique circumstances of these professionals, it is likely that this population has
important wisdom to share in regard to best practices and unique CE/PD needs—as well as cautions in such boundary-crossing work.

**Summary and next steps**

The *Mapping the Landscapes* needs assessment in continuing education and professional development offers a broad and statistically reliable overview of current perceptions, needs, assets and barriers, levels of competency and confidence across and within archives, library, and museum professions in the United States. This robust dataset provides a valuable opportunity for administrators and CE/PD professionals across sectors and across the country to engage in policy and decision making that is genuinely evidence-based, inasmuch as the survey was developed with the needs of end-user decision makers in mind.

Actionable information contained in this Viewbook as well as in the companion data visualization storyboard includes:

- Identification of barriers and drivers with respect to access to CE/PD.
- Detailed descriptive information regarding institutional, workplace, and other contextual factors that affect the use and effectiveness of CE/PD.
- Detailed information regarding the demand for specific competencies across settings.
- Self-reported gaps in current skill levels relative to the specific competencies required by particular roles.
- Patterns of reported confidence in skill level in specific competency areas that suggest the potential value of situational learning and whole learning models of continuing education.
- Factors perceived to enhance the benefits of CE/PD.

Note that these and other data points may be scrutinized on many levels, using either this Viewbook or the data visualization storyboard. For example, sector-level reports on all of factors of interest are available in this document. Further, many key factors may be filtered by sector and/or geographic location in the data visualization, allowing a highly flexible examination of patterns in the data. Given this flexibility, it is now possible to answer a great many questions about CE/PD using robust data. The availability of the tools derived from *Mapping the Landscapes* means that for the first time CE/PD decision makers across sectors possess reliable and actionable information.

The next challenge will be to develop an action plan (or plans) that is systematically grounded in a disciplined understanding of these data. Specifically, it is essential to identify key findings that can serve as the evidentiary foundation for a strategic CE/PD action plan (or support and inform any plans already in place).

The logical next step to accomplish this is to “unpack” the *Mapping* data in a way that is consistent with the Coalition’s theory of change (alternatively, using the Survey Conceptual model from this study as a starting point). The goal should be to develop a set of testable planning principles that support systematic, concrete, and measurable initiatives in CE/PD (or align with initiatives already in process).
In principle, the *Mapping the Landscapes* data offers not only a rational evidentiary framework for conceptualizing such initiatives going forward, but also a basis for objective evaluation and refinement of such efforts by the Coalition and others.
Executive summary

The Mapping the Landscapes Focus Group project, an initiative of the Coalition to Advance Learning in Archives, Libraries, and Museums, collected data from the cultural heritage field on continuing education and professional development (CE/PD) needs between August 2015 and June 2016. The project was funded through a federal grant from the Institute of Museum and Library Services, and managed by the nonprofit Educoipa Institute. Consultants from LYRASIS facilitated four focus groups at major cultural heritage conferences (Society of American Archivists, American Association for State and Local History, American Library Association, and the American Alliance of Museums) and two online/virtual focus groups, with a total of 61 participants.

Research focused on resources used for CE/PD (“providers” of workshops and courses), course topics recently taken and desired for the future, skills development, selection factors for CE/PD, and collaboration and cross-sector training trends.

Participants in the six focus groups were found to be active consumers of cultural heritage CE/PD. They identified 191 CE/PD providers (155 unique), and described 142 training sessions (120 unique) they had taken in the past year. They are interested in future training on a wide variety of subjects ranging from grant writing to advocacy, leadership, digital preservation and copyright. These desired classes aligned with the technical and management skills the focus group participants wanted to develop. While participants listed a wide variety of reasons for selecting specific classes, cost, geographic location, timing, and duration of training were leading factors in selection.

The majority of focus group participants had previously taken part in collaborative projects with institutions and individuals across the cultural heritage sectors, and saw many advantages and some barriers to these types of activities. While not as many had taken part in cross-sector training, they saw many advantages to doing so, and believed it would be beneficial on a personal level and to their organization. The focus group participants outlined some key topics they felt would be beneficial if offered across cultural heritage sectors.

Future researchers who may want to replicate the focus group study should concentrate on reaching the major fields in the cultural heritage community (archives, libraries, museums, and historical societies), and also the subfields within each discipline.
Introduction
In 2013, the Coalition to Advance Learning in Archives, Libraries, and Museums was founded as a community to develop joint strategies to address the increasing needs and shrinking resources for continuing education and professional development in the cultural heritage sector. A working group of the Coalition, focused on “Assessing the State of the Field,” began its work in 2013-14. Coalition and working group members developed a plan, “Mapping the Landscapes,” to canvas the field via focus group and survey tools to establish a core of data which benchmarks current CE/PD needs and opportunities across the cultural heritage community, and allows for future replication of the studies to determine progress in the field. The work of Mapping the Landscapes is funded through a federal grant from the Institute of Museum and Library Services and is managed by the nonprofit Educopia Institute.

In late July 2015, LYRASIS consultants Tom Clareson and Laurie Gemmill Arp were selected to implement the focus group portion of the Mapping the Landscapes study. The report below outlines the methodology, demographics, findings by individual group, trends in findings across the focus groups, and overall analysis of the findings, as well as outlining suggestions for future replication of this study and further research.

Methodology and focus group demographics
In August 2015, the LYRASIS consultants outlined the methodology for inviting focus group participants to attend four in-person focus group sessions. The “live” sessions were held at the Society of American Archivists (SAA) in August 2015; the American Association for State and Local History conference (AASLH) in September 2015; the American Library Association (ALA) Midwinter Meeting in January 2016; and the American Alliance of Museums (AAM) in May 2016. Two virtual focus groups (VFGs) were held in January and February 2016.

For each focus group, we reached out to Mapping the Landscapes Focus Group Task Force members; leadership of the associations whose meetings would be the site of the focus groups; listservs which we and other LYRASIS staff knew reached the target groups; and other allied organizations in order to promote the session to as wide an audience as possible with the announcement of the focus group sessions. For the virtual focus groups, in particular, the sessions were advertised via a variety of cultural heritage organizations’ listservs, and members of the Mapping the Landscapes project task force and Advisory Committee also promoted the program to their constituents.

For each conference and the virtual focus groups, we received a number of messages expressing interest in attending the sessions. LYRASIS project staff confirmed attendees for each session as their registration came in, and we sent a reminder with the session discussion guide between 4-7 days prior to each of the sessions.

We discovered, however, that not all of those who were confirmed for the session would attend the session. With the busy nature of conferences, it is understandable that this can happen, and the same may be true with the nature of the virtual focus groups being held as webinars, which were part of the participants’ standard workday.
The listing below shows the conference or virtual focus group, the number of confirmed participants, and the final number of participants attending the session to illustrate the drop off in numbers we experienced for each session.

**Summary Focus Group Report Table 1. Focus group session participant counts**

<table>
<thead>
<tr>
<th>Session</th>
<th>Number Confirmed Participants</th>
<th>Number of Actual Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAA</td>
<td>20</td>
<td>12</td>
</tr>
<tr>
<td>AASLH</td>
<td>12</td>
<td>9</td>
</tr>
<tr>
<td>ALA MW</td>
<td>11</td>
<td>8</td>
</tr>
<tr>
<td>AAM</td>
<td>16</td>
<td>10</td>
</tr>
<tr>
<td>Virtual #1</td>
<td>9</td>
<td>6</td>
</tr>
<tr>
<td>Virtual #2</td>
<td>20</td>
<td>16</td>
</tr>
</tbody>
</table>

In the “Future Research” section later in this report, we suggest some ways to try to reach larger numbers of participants for future sessions.

For the focus group sessions, the researchers also tried to reach as wide a range of “subfields” within the associations as possible, and looked for diversity in the virtual focus groups in the number of participants from subfields/subgroups.

This proved difficult because there are some subgroups within each association that hold their own standalone conferences; have member organizations with severely restricted budgets, which do not allow for travel to national conferences; and other reasons. We especially noted a lack of participants from the school library, theological library and archives, special library, corporate archives, and art museum sectors. Suggestions for reaching these populations are also included in the “Future Research” section below.

Overall, the focus group effort reached 61 participants across the six sessions. When looking at the larger “type of organization” demographics, we received a wide range of participants across the six sessions. While the researchers held focus groups at the key library, archives, museum, and historical society conferences, we also attracted a cross-section of participants in the virtual focus groups.

**Summary Focus Group Report Table 2. Participation by field**

<table>
<thead>
<tr>
<th>Field</th>
<th>Number of Actual Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Libraries</td>
<td>23 (including one library school representative)</td>
</tr>
<tr>
<td>Archives</td>
<td>14</td>
</tr>
<tr>
<td>Museums</td>
<td>12</td>
</tr>
<tr>
<td>Historical Societies</td>
<td>12</td>
</tr>
</tbody>
</table>

An important part of the *Mapping the Landscapes* Focus Group project, from the view of the principal investigators at Educopia Institute, was to have representation from the many subgroups that exist in the archives, library, museum, and historical society environment. While the focus groups were advertised to a variety of each organization’s members via leadership, member, and other related listservs, the researchers found that some of the larger membership subgroup types within the organization were most heavily represented in the final list of focus group participants for each session.
One of the initial questions in the focus group asked participants to self-select into subfield categories, which were parallel to the membership subcategories established by the hosting associations.

We found that many of the participants had real trouble selecting their “type” from among their association-designated categories. For the Society of American Archivists session, for example, these included college and university, corporate, government, and religious archives; special collections, museums, and historical societies. Many were resistant to categorize themselves, and some made up new categories.

Featured below are the actual comments related to the subfield question from each of the focus groups. Readers will note that, in some cases, participants categorized themselves in multiple ways, so they are represented in several subcategories.

*Summary Focus Group Report Table 3: SAA annual meeting co-located focus group participation by self-identified subfield* 39

<table>
<thead>
<tr>
<th>Field</th>
<th>Number of Actual Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>College and University Archives</td>
<td>4</td>
</tr>
<tr>
<td>Corporate Archives</td>
<td>1</td>
</tr>
<tr>
<td>Government Archives</td>
<td>0</td>
</tr>
<tr>
<td>Religious Archives</td>
<td>0</td>
</tr>
<tr>
<td>Special Collections</td>
<td>3</td>
</tr>
<tr>
<td>Museums</td>
<td>2</td>
</tr>
<tr>
<td>Historical Societies</td>
<td>1</td>
</tr>
<tr>
<td>Other – Public Libraries/Archives</td>
<td>1</td>
</tr>
<tr>
<td>Other – Technology</td>
<td>1</td>
</tr>
<tr>
<td>Other – Digital Asset Management</td>
<td>1</td>
</tr>
</tbody>
</table>

*Summary Focus Group Report Table 4: AASLH annual meeting co-located focus group participation by self-identified subfield* 40

<table>
<thead>
<tr>
<th>Field</th>
<th>Number of Actual Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate History (3)</td>
<td>3</td>
</tr>
<tr>
<td>Court and Legal History</td>
<td>2</td>
</tr>
<tr>
<td>State Field Alliances</td>
<td>6</td>
</tr>
<tr>
<td>Small Museums</td>
<td>5</td>
</tr>
<tr>
<td>Religious History</td>
<td>2</td>
</tr>
<tr>
<td>Historic Houses and Sites</td>
<td>5</td>
</tr>
<tr>
<td>Military History</td>
<td>0</td>
</tr>
<tr>
<td>Women’s History</td>
<td>3</td>
</tr>
<tr>
<td>Other - Special Libraries</td>
<td>2</td>
</tr>
<tr>
<td>Other - Government Agencies</td>
<td>5</td>
</tr>
<tr>
<td>Other – Archives</td>
<td>5</td>
</tr>
<tr>
<td>Other – Native American Program</td>
<td>2</td>
</tr>
<tr>
<td>Other - Historic Preservation Organization</td>
<td>2</td>
</tr>
<tr>
<td>Other - Heritage Tourism Organization</td>
<td>2</td>
</tr>
<tr>
<td>Other – National History Day</td>
<td>1</td>
</tr>
</tbody>
</table>

39 Distribution of 12 participants
40 Distribution of 9 participants
As one will note, many of the individuals attending the AASLH Focus Group felt that their organizations and they themselves represented many institution types.

Summary Focus Group Report Table 5: ALA Midwinter meeting co-located focus group participation by self-identified subfield

<table>
<thead>
<tr>
<th>Field</th>
<th>Number of Actual Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Libraries</td>
<td>5</td>
</tr>
<tr>
<td>Public Libraries</td>
<td>1</td>
</tr>
<tr>
<td>School Libraries</td>
<td>1</td>
</tr>
<tr>
<td>Other – Library Consortium/Special Library</td>
<td>1</td>
</tr>
</tbody>
</table>

Summary Focus Group Report Table 6: AAM annual meeting co-located focus group participation by self-identified subfield

<table>
<thead>
<tr>
<th>Field</th>
<th>Number of Actual Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Art Museum/Center</td>
<td>1</td>
</tr>
<tr>
<td>History Museum/Historical Society</td>
<td>4</td>
</tr>
<tr>
<td>Historic House/Site</td>
<td>1</td>
</tr>
<tr>
<td>Specialized Museums</td>
<td>4</td>
</tr>
</tbody>
</table>

Summary Focus Group Report Table 7: Virtual focus group #1 participation by self-identified subfield

<table>
<thead>
<tr>
<th>Field</th>
<th>Number of Actual Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>State library</td>
<td>1</td>
</tr>
<tr>
<td>Academic Library</td>
<td>1</td>
</tr>
<tr>
<td>Academic Archives</td>
<td>2</td>
</tr>
<tr>
<td>Government Archives</td>
<td>1</td>
</tr>
<tr>
<td>Historical Society</td>
<td>1 (representing institution with 2 museums and a research library)</td>
</tr>
</tbody>
</table>

Summary Focus Group Report Table 8: Virtual focus group #2 participation by self-identified subfield

<table>
<thead>
<tr>
<th>Field</th>
<th>Number of Actual Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>State (Government/Special) Library</td>
<td>3</td>
</tr>
<tr>
<td>Public library</td>
<td>4</td>
</tr>
<tr>
<td>Academic Library</td>
<td>1</td>
</tr>
<tr>
<td>Library School</td>
<td>1</td>
</tr>
<tr>
<td>Academic Archives</td>
<td>4</td>
</tr>
<tr>
<td>State (Government) Archives</td>
<td>1</td>
</tr>
<tr>
<td>Tribal Archives</td>
<td>1</td>
</tr>
<tr>
<td>Historical Society</td>
<td>1</td>
</tr>
</tbody>
</table>

---

41 Distribution of 8 participants  
42 Distribution of 10 participants  
43 Distribution of 6 participants  
44 Distribution of 16 participants
In general, the categorization of participants into the subfields/membership subcategories that have been established by associations in the field was met with resistance throughout the project. While representation by many categories of practice is important in this type of research, future researchers may want to reconsider how participants are invited to sessions, and how they are asked to categorize themselves in the focus groups. Asking the participants to provide field and subfield information when they register for the focus group sessions can help to determine distribution of participants prior to the meeting of the group.

Another methodology factor was the position and career demographics of the focus group attendees. At the live/in-person focus group meetings, the SAA, AASLH, and AAM sessions featured a mix of administrative, mid-level manager, and regular staff. At the ALA Midwinter session, a majority of the focus group participants were high-level administrators (director or associate director level). The same was true as far as time in the sector/field; the participants reflected a mixed level of time in the field, except for the ALA session where many of the participants were senior leaders. In the virtual focus groups, we were not able to identify positions and career demographics as completely because the sessions were not in person. The researchers felt that coding the questions during the session with information on a participant’s demographics was difficult, time-consuming, and might compromise confidentiality. However, the project task force suggested this might be important information to gain, so it is listed as a factor in the “Future Research” section.

An additional methodology factor was how the virtual focus groups were conducted. The invitation and registration processes were similar, as were the discussion guides, but since the sessions were held remotely via web-based meeting software, the groups did not meet face-to-face. The LYRASIS project consultants offered to the virtual focus group participants the possibility of utilizing microphones to participate in the sessions, but all participants in both sessions preferred to respond to questions in chat/text mode, which made transcription of the raw notes for the sessions much easier.

All materials related to the focus group project follow.

- The raw notes from each session appear in the Focus Group Raw Notes Collection within the Raw Data and Visualization section below
- The top line narrative reports are within the Individual Focus Group Session Reports section below
- A “master” discussion guide for the focus groups – the list of questions asked, including prompts, is included in the Focus Group Moderator’s Discussion Guide Master section of the Data Collection Guide and Instruments section below.
- Methods used to set up and manage each focus group are described within the Focus Group Moderator’s Setup Guide within the Data Collection Guides and Instruments section
Review of individual focus group results

Each of the six focus groups had its own “personality” and highlights. Prior to reviewing trends across all of the sessions that were held, it is worthwhile to characterize each event. In this section, the four live/in-person focus group events are covered first to group information by “approach,” and then the two virtual focus group results are provided, although the AAM session was held after the two virtual groups had been completed.

Society of American Archivists (SAA) Annual Meeting
Co-located Focus Group, August 20, 2015

The 12 participants in this session were resistant to characterizing themselves as a specific type of archivist, and some identified with multiple types or categories. Society of American Archivists, the American Library Association, and regional archives groups were the main continuing education providers utilized; LYRASIS, OCLC, and MOOCs were other key resources. Archives-specific topics (Digital Archives Specialist, Encoded Archival Description, and ArchivesSpace) were among the most prevalent professional development topics where training had been taken; copyright, advocacy, and rare books training had also been utilized.

Digital topics (working with born-digital materials, video recordings, digital forensics, user experience, and working with several types of digital archiving software) were among the future training topics of most interest; copyright and advocacy were also desired topics. Top skills development needs included technical skills, strategic planning, and people management. Multiple participants also suggested general skills, such as advocacy and leadership, and ethical persuasiveness.

Top selection factors for CE/PD courses included geographic/physical location for in-person classes, price, need, the instructor, and timing/scheduling.

Eleven of 12 participants noted that they had worked on collaborative projects across cultural sectors; all participants saw advantages in taking CE/PD training that reaches across cultural heritage sectors and is led by instructors from outside their sector. A wide range of comments on cross-cultural work focused on the interchangeability of topics across the sectors, and the necessity to go outside of library/archives/museum (LAM) boundaries for technical and digital information and instruction. There were some feelings that the field remains fractured when dealing with appraisal differences, exhibition curation, and descriptive practices for digital materials.

When asked about future opportunities for cross-sector training, popular suggestions included digital preservation, digital humanities, and institutionalizing cross-cultural collaboration. Key topics that were interwoven throughout the discussion included interest in technical training, training related to the digital environment (including digital humanities and digital preservation), and training related to people management skills. The importance of professional reading as a method of continuing education and professional development first surfaced in the discussions of this group, and became a topic that was discussed in each of the latter focus group sessions.
American Association for State and Local History (AASLH) Annual Meeting  
Co-located Focus Group, September 17, 2015

Again, at this session, participants were somewhat resistant to categorization, feeling that they and their organizations represented many institution types.

Top CE/PD providers for this group included AASLH itself, the American Alliance of Museums (AAM), SAA, and the Connecting to Collections Care Online Community. The most prevalent CE/PD topics taken previously included project management, human resources, copyright, and deaccessioning/collection management. Leadership, management issues, human resources, and deaccessioning were also areas of future interest for classes. Additionally, this focus group wanted to learn about the library world and to provide the library community with information on historical societies and sites. Again, professional reading - enumerated as leaflets, publications, and online resources - was prominently mentioned as an important CE/PD resource. In this session, participants mentioned a wide variety of skills to be developed, but no suggestion received more than one response.

Top CE/PD selection factors included cost, ease of attendance, need, relevance, and time. All nine focus group participants had worked on cross-sector collaborative projects, and saw strong advantages in this type of work, including specialized expertise, business training, fundraising, and cross-sector training on learning goals. None of the participants said they had taken cross-sector training in the past three to five years (although some had reported taking AAM and SAA workshops earlier in the session). Future cross-sector topics of interest included intellectual property/copyright, funding, physical and virtual exhibits, tribal issues, basic preservation techniques, and cultural tourism. It was very interesting to see that AASLH focus group attendees with museum-related jobs were interested in learning about libraries, and those more library-related staff were interested in learning about museums. There was also a great deal of interest in better understanding information technology and technical issues.

American Library Association (ALA) Midwinter Conference  
Co-located Focus Group, January 8, 2016

The eight ALA focus group participants mainly utilized CE/PD providers that included ALA, its divisions, and groups like the Association of Southeast Research Libraries and the Association of Research Libraries. Participants listed 25 recently taken course topics, but no topic had more than a single response. Future training topics of interest included grant writing, the “next big thing in the library field,” WordPress, change management, and some personnel-related issues like mindfulness and “getting along with library staff and patrons.” Skills for development included licensing and negotiation with vendors, concept mapping, and dealing with difficult patrons.

Top selection factors were cost, location, topic, timing, presenter/instructor, and sponsor. All participants had worked on cross-sector collaborative projects, including exhibits, speaker series, digital training, and oral history projects, and were eager to provide information on these collaborative ventures.

As with other sessions, there was a strong agreement that CE/PD reaching across cultural sectors was advantageous. This group mostly wanted to learn about other types and subgroups of cultural heritage
organizations, and suggested sessions such as “Museums 101 for Libraries” or “Archives 101 for Libraries” (six participants total), and school/education issues (4 participants).

There were several comments about barriers to cross-sector training in this group:

- “Archivists are interested more in preservation, librarians more in access.”
- “Access to information in local museums is a barrier.”
- “Common terminology is not used.”

Five of the focus group participants had taken cross-sector training before, on topics including data visualization (2), and SAA’s Project Management for Archivists. Additionally, on the topic of cross-sector activity, one library had provided grant assistance to the humanities departments on campus, and another spoke about the need for accelerated Master of Library Science (MLS) degrees for library staff with backgrounds in other fields. Finally, there were 13 suggestions for topics for cross-sector training. Most topics (7) dealt with technology and digitization issues, but there were also references to services across institution types, cataloging of non-traditional items, marketing of services, and ethnographic research on understanding user experience.

American Alliance of Museums (AAM) Annual Meeting
Co-located Focus Group, May 26, 2016

Ten participants (four from specialized museums, four from history museums and historical societies, one from a historic house, and one from an art museum/center) participated in this session.

AAM, state and regional museum associations, and AASLH were seen as top providers of professional development. Nineteen different course topics had been recently taken; the most popular were project management (four responses), best practices in museum education (4 responses), access issues (3 responses), and communications (3 responses).

Almost all “future” topics related to management and professional improvement issues. The following topics each received two “votes”: how to be a better manager, how to be a better trainer, how to facilitate effective meetings, cross-department collaboration, and board management. Facilitation and communication were the chief skills that participants wanted to develop. Other topics included museum technology, web design, and budgeting.

Top CE/PD selection factors for this group included cost, location, topic, duration, and timing. Some “new” responses first heard in this session included three participants who stated a preference for in-person training, two who wanted post-training follow-up, and two who based selection on if they could use the training in their jobs. There were many other singular responses to this question.

Collaborative projects included working with performing arts and cultural heritage groups (three responses) and a number of museums that have worked with libraries. Seven of the participants saw cross-cultural CE/PD as advantageous, but some barriers were noted as well, including timing, differing expectations and terminology, and differing levels of commitment. “Collaboration is a tricky beast,” one participant noted.
Six focus group attendees had taken cross-sector training, but most interest in the discussion group was generated by what cross-sector topics they would like to take. In fact, this group had the largest number of suggestions for future cross-sector topics of any of the “live” focus groups in the series. Topics drawing the most interest were community involvement, employment issues, managing/supervision, and data gathering/management/interpretation. Seven of the participants said cross-sector training would be beneficial to both them and their organizations.

Many of the key topics discussed during this session were related to people, professionalism, and management skills. Many of the AAM focus group participants had taken part in collaborative projects and saw advantages in collaboration, but they also mentioned some “challenges” in working between sectors (they intentionally discussed these factors as challenges rather than barriers).

**Virtual Focus Group 1, January 26, 2016**

Six participants attended this web-based session, including two from libraries, three from archives, and one from a historical society.

Key CE/PD providers for this group included SAA, LYRASIS, New England Archivists, and the Image Permanence Institute. A total of 19 CE/PD topics previously taken were listed; those courses or topics receiving more than one response were the SAA Digital Archives Specialist course, leadership, management/organizational management, and electronic records management. Fifteen “future” topics were suggested; the most popular were bringing together multiple technologies/how they can work together (i.e., DAMs, ArchivesSpace, CollectionSpace); grant writing/fundraising; and digital asset management/digital content management courses. The interest in working with multiple technologies was high in response to this question, and there was extended discussion on this topic.

The question on skills development generated more discussion in this session than it had in any of the “live” focus groups. Advocacy was mentioned by five participants and was a central topic of conversation throughout the session, as were some personal workplace skills (communication, listening, relationship building, and collaboration) and skills in dealing with technological changes.

Cost, location, timing of a CE/PD session, duration of the session (hours or days), delivery model/format, and interest priority of the topic to trainees were all noted as important selection factors. However, there were several responses tying selection factors in with performance goals and departmental plans, topics that had not surfaced in previous group sessions.

Four of the six participants had previously worked on collaborative projects across cultural heritage sectors. What was of most interest was that, combined, they had participated in fifteen projects! Project topics included preservation training, digital preservation, exhibits, National History Day, and work with departments and groups outside of the traditional cultural heritage community. All six participants saw advantages to taking CE/PD that reaches across cultural sectors. Popular observations in this part of the focus group discussion included:

- “Cross-pollination broadens perspectives for all, and enhances collaborative opportunities.”
• “Learning where the professions overlap, and [where] we can pool resources rather than reinventing the wheel [is important].”

Barriers to cross-sector training included time, budget, and learning about other professions’ education offerings, but deeper concerns, such as “addressing misunderstandings and reticence among allied professionals,” and groups feeling that they could not learn from each other, were also discussed as key concerns.

Four institutions had taken classes in ten different cross-cultural topics in the past three to five years. There were similarities between the topics, except that some were personnel related (management issues) and others were specific to preservation. Mentoring, coaching, collaboration, and collection access were popular as well. All participants felt that this type of training was important to their organization and themselves personally.

Final comments from this group included the need to “get out of silos,” and a need for broad-reaching promotion of cross-sector courses. This group also considered professional reading important.

Virtual Focus Group 2, February 25, 2016

Sixteen organizations participated in this session, including eight libraries, six archives, a historical society, and one library school.

Top resources included SAA (six mentions), ALA (3), Connecting to Collections Care (2), LYRASIS (2), and courses from both Rare Book School (3) and the ALA Rare Books and Manuscripts Section. Focus group participants had taken 17 current class topics in the past year; most popular were digital preservation/digital archiving (3), disaster planning (3), the SAA DAS course (2), and digitization/digital collections. When discussion turned to the courses the participants would like to take in the future, a total of 42 topics were suggested, the most from any session; top choices included digital preservation, metadata, Web 2.0 tools, grant writing, and creating/implementing volunteer-run programs. Other topics, mentioned individually, mostly centered on working with multiple collection material formats and management issues. Skills desired included management/administration, digital collections, assessment, effective archival processing, change management, and improved course instruction skills.

Thirteen participants said they had participated in cross-sector activities. Working with historical societies, state agencies, and area/regional digitization projects were among the most popular activities. While there were many positive comments about cross-sector activity, some barriers noted included:

• Different terminology/jargon across sectors (four responses)
• “Not thought of here” bias (where people are not accepting of suggestions if they did not think of them originally)
• An inability to appreciate the different ways in which different cultural heritage institutions work

Eleven participants had taken cross-sector training, mainly archivists who had attended museum, library, and historical training offerings. Cross-sector courses for the future including programming/coding,
museum collection management, public speaking, and ten other individual suggestions. Cross-sector training was seen as advantageous by 13 of the participants in this group. There was agreement that CE/PD “should focus on nuts and bolts issues, and ideas that can be implemented locally.” Finally, eight session participants said professional reading was important to them.

**Trends analysis across the focus group series**

While the results of the individual focus group meetings provide some helpful information, the trends across all six focus group sessions are more revealing.

**Continuing education/professional development resources**

Focus group participants listed a total of 191 CE/PD provider organizations (155 unique) in the six sessions. There are several CE/PD provider organizations that were mentioned multiple times across multiple focus groups. The six listed below received the largest total number of “votes” across the six sessions.

*Summary Focus Group Report Table 9. Continuing education/professional development providers with highest mentions*

<table>
<thead>
<tr>
<th>Provider</th>
<th>Number of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Society of American Archivists</td>
<td>24</td>
</tr>
<tr>
<td>American Alliance of Museums (including EDCOM)</td>
<td>15</td>
</tr>
<tr>
<td>American Library Association</td>
<td>13</td>
</tr>
<tr>
<td>American Association for State and Local History</td>
<td>11</td>
</tr>
<tr>
<td>LYRASIS</td>
<td>7</td>
</tr>
<tr>
<td>Connecting to Collections Online Community</td>
<td>6</td>
</tr>
</tbody>
</table>

**Course topics – current**

Across the six focus groups, participants noted 142 CE/PD topics (120 unique) on which they had taken classes/received instruction in the past year. Leading topics taken, and reflected across several groups, included:

*Summary Focus Group Report Table 10. Top topics for continuing education/professional development*

<table>
<thead>
<tr>
<th>Topic</th>
<th>Number of Responses</th>
<th>Percentage of 61 Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAA Digital Archives Specialist curriculum</td>
<td>7</td>
<td>11%</td>
</tr>
<tr>
<td>Copyright</td>
<td>5</td>
<td>8%</td>
</tr>
<tr>
<td>Disaster Preparedness/Planning</td>
<td>4</td>
<td>6.5%</td>
</tr>
<tr>
<td>Digital Preservation</td>
<td>4</td>
<td>6.5%</td>
</tr>
<tr>
<td>Leadership</td>
<td>4</td>
<td>6.5%</td>
</tr>
</tbody>
</table>

**Course topics – future**

When the discussion turned to topics that the focus group participants would like to take in the next three to five years, even more topics were suggested (180 in total). While many of the topics were quite specific in nature and mentioned in only one focus group, there were a few topics mentioned across multiple focus group sessions.
### Skills development

Participants were asked about the skills they hoped to develop through CE/PD opportunities. There were a wide variety of responses, and many were quite specific in nature. There was a combination of interest in technical skills/instruction, and professional/management skills across the six focus groups.

### Offering selection factors

Discussions in each of the six focus group sessions on the factors that lead participants to select specific continuing education/professional development opportunities brought forth a strong level of agreement in many of the sessions, and in data collected across the focus group events. Leading factors included:

### Summary Focus Group Report Table 11. Top desired topics for continuing education/professional development

<table>
<thead>
<tr>
<th>Topic</th>
<th>Number of Responses</th>
<th>Percentage of 61 Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant Writing</td>
<td>11</td>
<td>18%</td>
</tr>
<tr>
<td>Advocacy</td>
<td>7</td>
<td>11%</td>
</tr>
<tr>
<td>Leadership</td>
<td>3</td>
<td>5%</td>
</tr>
<tr>
<td>Digital Preservation</td>
<td>3</td>
<td>5%</td>
</tr>
<tr>
<td>Copyright</td>
<td>2</td>
<td>3%</td>
</tr>
</tbody>
</table>

### Summary Focus Group Report Table 12. Five most common skills identified for development

<table>
<thead>
<tr>
<th>Skill</th>
<th>Number of Responses</th>
<th>Percentage of 61 Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical Skills</td>
<td>9</td>
<td>15%</td>
</tr>
<tr>
<td>Advocacy</td>
<td>8</td>
<td>13%</td>
</tr>
<tr>
<td>People Management</td>
<td>4</td>
<td>6.5%</td>
</tr>
<tr>
<td>Digitization/Digital Project Management</td>
<td>4</td>
<td>6.5%</td>
</tr>
<tr>
<td>Budgeting</td>
<td>3</td>
<td>5%</td>
</tr>
</tbody>
</table>

### Summary Focus Group Report Table 13. Leading offering selection factors identified

<table>
<thead>
<tr>
<th>Selection Factor</th>
<th>Number of Responses</th>
<th>Percentage of 61 Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price/Cost</td>
<td>38</td>
<td>62%</td>
</tr>
<tr>
<td>Geographical/Physical Location</td>
<td>24</td>
<td>39%</td>
</tr>
<tr>
<td>Timing of Session</td>
<td>19</td>
<td>31%</td>
</tr>
<tr>
<td>Length of Time/Duration/Time Commitment</td>
<td>14</td>
<td>23%</td>
</tr>
<tr>
<td>Topic</td>
<td>10</td>
<td>16%</td>
</tr>
<tr>
<td>Need</td>
<td>7</td>
<td>11%</td>
</tr>
<tr>
<td>Provider/Sponsoring Organization</td>
<td>7</td>
<td>11%</td>
</tr>
<tr>
<td>Interest/Priorities of Trainee</td>
<td>7</td>
<td>11%</td>
</tr>
<tr>
<td>Delivery Mode/Format</td>
<td>4</td>
<td>6.5%</td>
</tr>
</tbody>
</table>
Collaboration and cross-sector training

Of the 61 participants across the six focus group sessions, 55 had participated in cross-sector collaborative projects. As previously mentioned, the ALA, AAM, and two virtual focus group sessions included a good deal of discussion about the type of projects organizations had done. In follow-up to that question, participants were asked if they see advantages to taking CE/PD offerings that reach across cultural heritage sectors and that are led by an instructor or organization outside of their own sector. Here, 57 participants saw advantages.

Key factors seen as advantages were that all sectors were interested in learning about each other’s organizations; there was widespread interest in digital technology and descriptive standards; participants feel special expertise is valuable; and they see areas where the professions overlap and/or are converging in which resources can be pooled. A widely-held opinion was that cross-pollination between the sectors broadens perspectives for all, and enhances collaborative opportunities. A statement from one participant that “the value is evident – there is a clear connection” between the fields was reflected in the comments of many.

There were also some barriers to cross-sector work noted by focus group participants. Concerns heard across the six groups included:

- Cultural traditions between institution types may be a barrier (collections care vs. access)
- Lack of common terminology across fields is a concern
- Misunderstandings and reticence among allied professionals to work with each other (archivist/librarian relations were most often cited)
- Inability to appreciate the different contexts in which different types of organizations work
- Differing expectations
- Different scales of financial resources and levels of commitment can also make collaboration difficult

Across the sessions, some participants had taken cross-sector training in the past three to five years, and, when they had, it was in a diverse set of topic areas with little commonality. Some talked of attending conferences or training sessions in other disciplines.

Where there was more agreement was in the types of cross-sector training that participants would like to take in the future. Topics included:

**Summary Focus Group Report Table 14. Leading cross-sector training opportunities identified**

<table>
<thead>
<tr>
<th>Cross-sector topic</th>
<th>Number of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant Writing and Fundraising</td>
<td>3</td>
</tr>
<tr>
<td>Exhibits</td>
<td>3</td>
</tr>
<tr>
<td>Cross-cultural Heritage Collaboration</td>
<td>3</td>
</tr>
<tr>
<td>Digital Preservation</td>
<td>2</td>
</tr>
<tr>
<td>Digital Humanities</td>
<td>2</td>
</tr>
<tr>
<td>Copyright</td>
<td>2</td>
</tr>
<tr>
<td>Metadata</td>
<td>2</td>
</tr>
</tbody>
</table>
Most of the participants also agreed that cross-sector training would be beneficial to both them and their organizations.

In a final question, participants were asked about any other topics or comments they would like to share in their session. When timing of the focus group allowed, this question generated some helpful observations, some on a conceptual level and some on a very practical level.

- “Getting us out of our silos will benefit not only our organizations, but also society as a whole.”
- “[We need] ways to encourage organizations to be more supportive of CE/PD – especially smaller organizations.”
- “Historical societies are great places to look for examples of working across fields; they are kind of a microcosm of collections within an organization.”
- “Organizations offering CE/PD courses need to make sure they are publicized across fields.”
- “CE/PD should focus on nuts and bolts issues and ideas that can be implemented locally.”
- “So many good ideas lose momentum afterwards, whereas continued communication with the same people would be great.”

**Comparison to project survey data**

Another component of the *Mapping the Landscapes* project was a continuing education/professional development Needs Assessment Survey conducted by TrueBearing Consulting during 2015 to 2016.

A review of the initial report on the survey project, released in June 2016, shows some striking similarities between the two assessment tools, and additional opportunities for further research.

The synchronicity between the efforts begins with the distribution of organization types participating in the two studies. As noted earlier in the report, out of the 61 participants in the focus group sessions, the major groupings were libraries (23, or 37.7% of the total); archives (14, or 23%); museums (12, or 19.7%); and historical societies (also 12, or 19.7%). The survey project collapsed historical societies into the museum category for some of its analysis, and arrived at approximately 40% library participation, 24% archival participation, and a combined 30% museum/historical society participation (these tallies also include organizations which identified themselves as “hybrids” of sector types, which is explained further below).

Similar to the focus groups, the survey found that some participants “specified one or more sectors” when identifying their sector types, illustrating a similar difficulty to that encountered in the focus groups in which cultural heritage professionals who may serve in a variety of roles are resistant to self-identifying/self-selecting into a single sector. As the survey report says, “A notable set of findings in this study is the (perhaps) surprising number of respondents who identified as belonging to more than one sector and/or work in more than one type of setting.”

Important factors in selecting CE/PD opportunities showed some similarities as well. In the survey, “fees” and “other costs” were among the top categories of importance in selection, as were proximity (vs.
“distance” in the focus groups), schedule, and organizer reputation. Multiple focus group participants also mentioned these factors.

Project management, planning/evaluation, supervision and/or human resources are among the top competencies/topics for education desired by both survey and focus group respondents. When the survey looked specifically at “Competency Areas as Critical to Success in Role,” the five major themes were leadership, institutional management, technology, public-facing (working with patrons/customers), and collections. The first three of these themes were also among top “skills development” areas desired by the focus group participants.

One area for future analysis and research is in the “overall greatest identified needs” and “most significant identified needs” by type/sector of institution answering the survey. Potentially, the association-specific focus group “Top Line Reports” and survey results by sector could be compared. In addition, because the survey was a much longer instrument with more questions, choosing some of the survey questions for which in-depth answers are desired could be used to supplement future focus group discussion guides in order to provide additional information.

Conclusions

The Mapping the Landscapes focus group series was extremely well received by focus group participants, who were pleased to have the opportunity to offer their opinions. Discussions allowed identification of leading CE/PD providers in the cultural heritage field with whom to work in the future on cross-sector training. These included SAA, AAM, ALA, AASLH, LYRASIS, and the Connecting to Collections Online Community.

Participants in the focus groups were active consumers of cultural heritage CE/PD, having taken classes on 142 different topics in the past year. Digital archiving and preservation, copyright, leadership, and disaster preparedness were among the topics most frequently taken. Some of these topics continued to rank high when participants were asked what classes they would like to take. Grant writing, advocacy, leadership, digital preservation and copyright led the choices here, and should be strongly considered as offerings by individual cultural heritage providers and collaborative provider groups. The following topics aligned with the skills participants wanted to develop: general technical and digitization-based skills, as well as management skills like advocacy, people management, and budgeting. As might be expected, cost, geographic location, timing, and duration of training were key selection factors; future cross-sector CE/PD offerings will need to take all of these factors into account during the planning processes.

A vast majority of the focus group participants had taken part in cross-sector collaborative projects. A variety of advantages to this type of cross-pollination were cited. Barriers still remain to cross-cultural collaboration, however, as differing traditions, terminology, and expectations continue to exist among the groups. These barriers must be addressed as any type of cross-sector curricula are designed in the future, through development of classes by cross-sector teams, testing/piloting of courses by cross-sector audiences, and through other collaborative means.
While not as many focus group participants had taken part in cross-sector training, they saw advantages in doing so and believe it will be beneficial on a personal level and to their organizations. A variety of topics – grant writing, exhibits, cross-cultural collaboration, digital preservation, digital humanities, copyright, and metadata – are seen as potential cross-sector class topics of interest. These topics should be central among those to be investigated by the Coalition and other collaborative entities in planning future continuing education/professional development offerings.

**Future research**

A key component of the *Mapping the Landscapes* survey and focus group projects was the possibility of replication of the data collection in the future to study longitudinal trends in continuing education/professional development needs. This section covers key issues in the replication of the focus group study.

As one can note from the findings of the focus group research, all of the sessions attracted engaged participants, and resulted in very helpful and instructive findings. Participants were eager to offer their opinions on continuing education/professional development needs, no matter what type or size of institution they were from, or the focus group method by which they participated. There was a high level of participation by each focus group registrant, and, across all of the groups, they are interested in receiving a report of the project and monitoring future developments in CE/PD offerings. In many cases, the group discussion took the planned focus group conversation in new and revealing directions (for instance, the discussion of professional reading, which was not on the original discussion guides for the project).

However, as noted in the “Methodology” section above, this initiative did not reach all subfields of each sector. While the methodology used for the focus group series was strong, the LYRASIS consultants have a number of suggestions for those replicating the focus group initiative in future years to study trends in the field, and we hope that these suggestions can help to reach a wider cross-section of the field.

- **Work to have each focus group officially sponsored by the hosting organization:** Because of the short time period between the award of the research contract and the initial focus groups held at SAA and AASLH, it was not possible to have the focus groups appear in the conference program or announcements. For ALA and AAM, program descriptions, which are widely promoted, must be approved by committees or the organization as much as a year in advance. Because of this, the marketing in most cases for the “live” focus groups was not done officially through the organization, but through members of those organizations and allied associations, where applicable. Future researchers may have the opportunity to have more formal ties with the conference host organization, and establish communication with association staff and program committees to have the focus groups listed officially and included in pre-conference programs and publications.

- **Work directly with subgroups that have their own conferences:** As mentioned in the “Methodology” section above, there were certain groups that the researchers had difficulty attracting to participate in the focus groups; these included the school library, theological library and archives, special library, corporate archives, and art museum sectors. Many of these sectors have their own standalone conferences, including the American Theological Library Association...
(ATLA), the Special Library Association (SLA -- which also attracts a large number of corporate archivists), and the American Association of School Librarians (AASL). If there is a strong desire to reach these groups, future researchers may want to include holding a focus group session at those specific conferences.

- **Hold a virtual focus group specifically focused on difficult-to-reach subgroups/subfields:** In a combination of the two suggestions above, future researchers may want to work with contacts at the ATLA, SLA, AASL, and other groups to promote virtual focus groups specifically directed toward their members.

- **Hold telephone interviews with individuals or small groups within the subfields:** Another suggestion is to hold telephone interviews with members of these subgroups if they can be identified. However, future researchers will need to budget time to identify and communicate with these targeted focus group participants. Also, the researchers will have to weigh if pursuing these participants to such a degree will in any way skew the objectivity of focus groups which are composed of participants who self-select to participate.

- **Hold focus groups that are not connected with national conferences:** One method to accomplish the above would be to hold focus group sessions in widespread geographic locations (for example, Boston, Chicago, and Los Angeles). This approach may result in extremely random groups of participants in the focus groups, but it is a potential future methodology that should be explored.

- **Allow larger pre-registration numbers for the sessions:** The researchers have determined through past projects that 15 is an optimal number of participants in a focus group in order for all attendees to have a chance to be heard and so that the session can stay on schedule. With the number of registration drop-offs noted for these sessions; however, one suggestion is to increase the pre-registration limit to 30, with the hope that 15-20 individuals will attend.

- **Satisfy interest of education providers, funders, and educators:** In registration trends for each of the sessions, there was extremely strong interest among funders, educators, and education providers, many of whom represent Coalition member organizations. The researchers asked these potential participants not to attend the sessions, as there was concern about the presence of funders or education providers introducing bias into the results of the session. Future researchers may want to develop a specific strategy related to this trend in registrations. Establishing an early partnership with these organizations could help reduce confusion about whether they can participate in the focus groups or assist with outreach to their constituents, including sharing results.

Other potential questions and topics for future focus group research might include gathering additional information about the number of years the person has been in their sector or position, as well as their number of years in the field. The researchers felt that coding the questions during the session with information on the participant’s demographics was difficult, time-consuming, and might compromise confidentiality. However, the project task force suggested this might be important information to gain. Given that interest, future researchers may want to consider how to best, and least obtrusively, gather this information in a focus group setting in the future.
Individual Focus Group Session Reports

Authors: Tom Clareson, Laurie Gemmill Arp, LYRASIS
Co-Editors: Phaedra Livingstone, Kendra Morgan, Barbara Rothermel, Lisa Sjoberg
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SAA conference session: August 20, 2015 Top Line Report

Background and demographics

Tom Clareson and Laurie Gemmill Arp of LYRASIS, consultants on the *Mapping the Landscapes* Focus Group project, held the first of four planned in-person focus group meetings at the Society of American Archivists’ Conference in Cleveland, Ohio, on August 20, 2015. Nearly 50 people responded to the invitation to the event; 20 were confirmed to attend the session, and 12 people participated in the focus group. As focus group leaders, we often see a slight drop off in attendance from confirmed numbers, particularly when the focus group is being held during a conference.

An important part of the *Mapping the Landscapes* project, from the view of the principal investigators at Educopia Institute, is to have representation from the many subgroups that exist in the archives, library, museum, and historical society environment. While this focus group was advertised to a variety of SAA members via the organization’s leadership listserv, we found that some of the larger archives types within the organization were most heavily represented in the final list of focus group participants. We also found that many of the participants had real trouble selecting their “type” from among the SAA-designated categories (college and university, corporate, government, and religious archives; special collections, museums, and historical societies); many were resistant to categorize themselves; and some made up new categories. The twelve participants in the session categorized themselves as:

- a. College and university archives – 4 (one participant also said special collections; they are counted in both categories)
- b. Corporate archives – 1
- c. Government archives – 0
- d. Religious archives – 0
- e. Special collections – 3 (one participant also said univ. archives; one said this and historical societies; counted in both categories)
- f. Museums -- 2
- g. Historical societies – 1 (one said this category and special collections)
- h. Other categories
  - i. Public libraries/archives – 1
  - ii. Technology – 1
  - iii. Digital asset management – 1

The focus group consultants will take extra care in promoting the virtual focus groups to government and religious archival groups, in order to ensure that the needs of these audience segments are heard.
Continuing education/professional development resources

When asked about the organizations they utilize for archival education continuing education/professional development (CE/PD) opportunities, the 12 participants listed a total of 43 different providers. The leading providers mentioned were:

- Society of American Archivists (SAA) – 10
- LYRASIS (and previously, SOLINET) – 5
- Mid-Atlantic Regional Archives Conference (MARAC) – 4
- American Library Association (ALA) – 4, and 2 from ALA Divisions (RBMS, LITA)
- MOOCs – 3
- OCLC Online Computer Library Center Inc. Webinars – 2

The other providers listed by attendees were mainly city- or state-based archival associations and education organizations.

Course topics – current and future

When asked what types of archival CE/PD course topics they had taken in the past year, the group came up with a total of 24 answers. Most prevalent among the topics taken were:

- Copyright – 3  •  ArchivesSpace – 3
- SAA Digital Archives Specialist Curriculum – 3
- Rare Books Training – 2
- Advocacy training – 2
- Encoded Archival Description (EAD) training – 2

For this question, then, one can determine that more general topics, such as copyright and advocacy, were attended as much as some of the digital or technical-specific classes such as ArchivesSpace, SAA/DAS, and EAD training.

When the focus turned to Archival education CE/PD the focus group participants would like to take in the next one to three years, there was some general agreement among the participant group on popular class topics:

- Working with born digital materials – 4
- Advocacy – 4
- Working with Video Recordings – 3
- User Experience – 3
- Digital Forensics – 3
- ArchivesSpace – 2
- Omeka training – 2
- Copyright – 2
- Strategic Planning – 2 (one for ArchivesSpace workflow, one for a smaller repository)
Again, the interest in technical and/or product-related educational opportunities was high in the responses to this question.

**Skills Development**

Participants were asked about the skills they hope to develop through CE/PD opportunities, and the high level of interest in technical instruction was reflected here as well. However, most of the skills mentioned in this discussion had to do with leading, persuading, and managing people and plans. Top responses were:

- Technical skills – 5
- Strategic planning to move concepts forward and advocate for them – 3
- People management – general – 3
- How to be ethnically persuasive – 2
- Advocacy/external leadership – 2

At the end of this part of the discussion, the participants discussed resources such as the Engineering Management Society, which has resources and literature on management and people skills that some had found very useful. There was also strong interest expressed by the group in Mentoring and Diversity issues. A later question on skills participants wish to gain to remain on top of the developments in their field elicited some additional people-related topics such as: new instruction and student engagement methods, community outreach skills, and trends in Digital Humanities

**Professional development selection factors**

Discussion on the factors that lead participants to select specific CE/PD opportunities brought forth the strongest level of agreement of any of the questions asked at the SAA Focus Group session:

- Geographic/physical location for in-person classes (example: Chicago) – 6
- Price – 6 (many respondents tied this to location/delivery/schedule issues)
- Felt need – 5
- Instructor – 4
- Timing (for instance, with conference) – 4
- Schedule fits with work and travel – 4
- “Will this skill make me money?” – 2

So, while many of the “standard” answers to survey and focus group questions on why certain workshops are selected were mentioned here, the idea of a “felt need” for education by the participants was also a popular selection motivator, and it was interesting to find out that potential money earnings was another motivator.

The group discussion at end of this question veered off the main topic, but provided an interesting insight. Among the SAA Focus Group, all participants regularly read about professional topics. Resources consulted include: technical journals, newsletters from sections (visual materials; museum archives),
book reviews, and online resources such as Twitter (“the archival thought leaders are there,” said one participant, to wide agreement among the group). Online resources are gaining in importance, as “there is too much to read daily to manage reading in print materials,” according to some members of the group.

A further question in this part of the discussion asked participants if they, or their organization paid for the CE/PD activities they chose. Six participants said their organization paid; four said they paid personally (these were mostly archival consultants, covering their own CE/PD costs).

**Collaboration and cross-sector training**

When asked if they, or their organization worked on collaborative projects across cultural heritage sectors (for example, archives working with museums, libraries, or historical societies), eleven of twelve participants said they have worked on cross-sector collaborative projects. Following up on this finding, the focus group moderators asked the participants if they see any advantages to taking CE/PD that reaches across cultural sectors and is led by non-archival organizations. Two participants initially said yes, and then the rest agreed. Discussion was very animated during this part of the focus group; there were twenty comments related to this question. Among the most revelatory of the comments:

- “Many topics are interchangeable between LAM types, and will probably coalesce in the future.”
- “For technical content, we have to go outside LAM boundaries to get it.”
- “Users work in cross-sector spaces; it is important for us to understand this and engage our users.”
- “Go to the source who does it best, learn it, and apply it“ (MBA programs were mentioned).
- There was a feeling that “the fields (archives, libraries, museums, and historical societies) are very fractured – when curating exhibits, there are appraisal differences.”
- All fields are interested in the digital universe – they want to share things, but the fields are still fractured. Additionally, within the Digital Public Library of America (DPLA), “all sectors’ digital materials show up in DPLA, yet there are not descriptive best practices yet across the whole field.”
- All cultural heritage sectors are interested in descriptive practices and standards. Also on the topic of arrangement and description, one participant asked if “digital curation is cherry picking?” and mentioned the need to protect basic archival principles.
- “Archivist vs. Curator is an artificial distinction to the user.”
- One participant said continuing education in archives actually hurt them when applying for a library/museum job. There is a stigma to some of the training that can leave you stuck in your profession. “A skill should be transferable (across cultural heritage institution type), but IS IT?”
- Cross-sector work is driven by finances – we collaborate because money limits the resources LAMS have
- “We can’t have three systems” across libraries, archives, and museums, and even more systems within each of the institution type areas, according to one participant, whose comment was met with a great deal of agreement by other focus group attendees.
- Archivists are trying to protect their collections, not be non-collaborative
• One participant noted that there had been difficulty in the past when SAA tried certification in specific areas of the field. Should there be educational standards in the future?

• Three interesting comments on large-scale advantages of cross-sector work came at the end of this discussion:
  o “Is cross-sector work becoming easier because of the generational shift in archives workers?”
  o Working across sectors may help mid-career job changers. While some are getting PhDs, others are using continuing education to enter a new profession without a new degree.
  o Cross-sector training can help in acculturation

Only one participant mentioned barriers to cross-sector training, specifically noting that general higher education classes which they took might be “too general” to address their needs, which are in the nonprofit/cultural heritage arena.

A number of the focus group participants had taken cross-sector training in the past three to five years, mostly on technical topics such as digital preservation and conservation, digital asset management, computer science, and appraisal – looking beyond the archival field to a more scientific approach. One participant noted that disciplinary training in the past had been nontransferable; now they focus on mainstream certification and can transfer skills (e.g., project management) to the archival field.

Finally, when asked what topics they would be interested in if they were to take cross-sector training, the group provided thirteen suggestions. While most centered on topics such as digital preservation, how to institutionalize cross-cultural collaboration, digital humanities, audience engagement and instruction tips, and digital humanities, there were some interesting topics which had not been raised in earlier discussion by the group:

• Working with underserved populations including the ADA population and assisted living populations.
• Working with more types of materials; for instance, how to digitize textiles
• Metrics and evaluation
• Fundraising

At the end of the session, when asked if cross-sector training would be beneficial to them professionally, to their organization, or both, one of the participants noted that this type of training applies directly to the expectations put on a university library.

**Overall findings**

Key topics that were interwoven throughout the discussion were a strong interest in technical training, training related to the digital environment (including digital humanities and digital preservation), and training related to people/management skills. Most of the focus group participants had taken part in collaborative projects and saw advantages in collaboration, but there are also many “fractures” between cultural heritage organization types that need to be addressed. The emphasis in discussion on
professional reading drew attention to the need to include that issue among important methods of professional development and continuing education, as well.
AASLH conference session: September 17, 2016 Top Line Report

Background and demographics

Tom Clareson of LYRASIS, consultant on the Mapping the Landscapes Focus Group project, assisted by his LYRASIS colleague Leigh Grinstead, held the second of four planned in-person focus group meetings at the American Association for State and Local History Annual Conference in Louisville, Kentucky, on September 17, 2015. About 16 people responded to the invitation to the event; 12 were confirmed to attend the session, and 9 people participated in the focus group. As with the Society of American Archivists (SAA) Mapping focus group, and other sessions we have done over the years, we often see a slight drop-off in attendance from confirmed numbers, particularly when the focus group is being held during the midst of a conference.

An important part of the Mapping the Landscapes project, from the view of the principal investigators at Educopia Institute, is to have representation from the many subgroups that exist in the archives, library, museum, and historical society environment. The AASLH focus group was advertised to a variety of member types via the organization’s leadership listserv and through messages to the Conference Registered attendee list. As with the SAA focus group session, we found that many of the participants had real trouble selecting their “type” from among the AASLH-designated categories); many were resistant to categorize themselves; many categorized themselves as representing organizations that straddled a number of categories; and some made up new categories. The nine participants in the session categorized themselves as:

a. Corporate history – 3
b. Court and legal history – 2
c. State field alliances – 6
d. Small museums – 5
e. Religious history – 2
f. Historic houses and sites – 5
g. Military history – 0
h. Women’s history – 3
i. Other Affiliations
   i. Special libraries – 2
   ii. Government agencies – 5
   iii. Archives – 5
   iv. Native American program – 2
   v. Historic preservation organization – 2
   vi. Heritage tourism organization – 2
   vii. National History Day – 1

As you can see, many of the organizations felt that their organizations and they themselves represented many institution types.
Continuing education/professional development resources

When asked about the organizations they utilize for continuing education/professional development (CE/PD) opportunities, the nine participants listed a total of 36 different providers. The leading providers mentioned were:

- American Association for State and Local History (AASLH) – 8
- American Alliance of Museums (AAM) – 5
- Society of American Archivists (SAA) – 4
- Connecting to Collections Care Online Community – 4
- National Council on Public History – 3
- National Association for Interpretation – 2
- Western Museums Association – 2
- Northeast Document Conservation Center (NEDCC) – 2
- National Trust for Historic Preservation – 2
- Software-Specific Vendor Training – 2

Of interest, here is that, along with AASLH as the top provider, AAM and SAA, two of the top cultural heritage associations, were among the most highly-utilized providers. The other providers listed by attendees were mainly state-based historical or museum associations.

Course topics – current and future

When asked what types of CE/PD course topics they had taken in the past year, the group came up with a total of 38 answers, many more than the focus group at SAA, which was attended by more participants. Most prevalent among the topics taken were:

- Project management – 3
- Copyright including digital image use – 2
- Deaccessioning and collections management topics – 2
- Human resources – 2

When the raw data from the responses to this question were content-analyzed, and other legal issues were added to Copyright, there were a total of 4 participants who had taken copyright or legal issues workshops. Additionally, through content analysis, 3 participants had taken grant writing or fundraising instruction.

A very interesting portion of this focus group session took place during the discussion of the types of course topics taken in the past year. All nine of the AASLH session participants mentioned that they read professional leaflets, publications, and online resources regularly as part of their continuing education/professional development. In the SAA session, a similar conversation took place during the discussion of the factors influencing participants to select specific CE/PD opportunities. The fact that both sessions addressed professional reading as a topic, although it was not on the agenda/Discussion Guide, shows that it is an important component of CE/PD across cultural heritage sectors.
When the focus turned to archival education the focus group participants would like to take in the next one to three years, there were 38 suggested class topics, again more responses than received at the larger SAA focus group. Key topics of interest for future CE/PD were:

- Basic information on library science/the library world (collaboration) – 4
- Leadership – 3
- Basic museum 101 for libraries – 2
- Managing from the middle – 2
- How kids learn beyond “learning styles” (Education in context) – 2
- Human resources – 2
- Deaccessioning – 2

Additionally, after additional content analysis of the raw data from these questions, the answers from 5 participants were grouped into a popular topic of I.T.-related issues, most centered around understanding and communicating with I.T. staff. Three participants suggested topics that can be loosely grouped as dealing with “conflict resolution.” There were also two participants who would like to take grants and fundraising workshops.

**Skills development**

Participants were asked about the skills they hope to develop through CE/PD opportunities, and, as with the SAA group, some interest in technical instruction was reflected here. However, the most interest for skills development was in areas related to communication, and gender advocacy issues. In fact, most of the skills mentioned in this part of the discussion had to do with leading, persuading, and managing people and plans. Participants also felt that the skills they mentioned here were skills they wished to gain to remain on top of developments in their four fields, which made discussion of the sixth question in the focus group discussion guide unnecessary. All of the following skills areas received one response.

- Digitization – 1
- Cemetery preservation – 1
- How to talk to administration/advocate for your own expertise and get them to listen and respect – 1
- Being able to sell what you do/how to write a bio etc. – 1
- Public presentation skills – how to engage your profession – 1
- Gender awareness, especially as it relates to skills development – 1
- Women advocating for themselves professionally – 1
- Exhibit development in-house – 1
- Digital design for all professionals – 1
Professional development selection factors

Discussion on the factors that lead participants to select specific CE/PD opportunities brought forth a high level of agreement at the AASLH session, just as it did when asked at the SAA focus group session. Top factors mentioned by the participants were:

- Cost – 6
- Ease of attendance – 5
- Proscribed Need – 3
- “The Relevance Argument to Administration” – 3
- Time (one or series of multiple classes; homework could be a problem) – 3
- Immediate Need – 2
- Flexibility/asynchronous – 2
- Reputation of provider organization – 2

As with at the SAA session, the idea of a “felt/proscribed/immediate” need for education by the participants was a popular selection motivator.

Collaboration and cross-sector training

When asked if they or their organization worked on collaborative projects across cultural heritage sectors (for example, historical societies working with museums, libraries, or archives), all 9 participants said they have worked on cross-sector collaborative projects.

Following up on this finding, the focus group moderators asked the participants if they see any advantages to taking CE/PD that reaches across cultural sectors and is led by non-AASLH organizations. All 9 participants agreed that there were advantages, and there were some comments about these:

- Outside training is good
- Special expertise is valuable
- Business training cross-cultural heritage classes may work
- Fundraising training with funders (communication) is needed
- Museums/libraries/archives (training) on the same topic – learning goals – education (is important)

Only one participant mentioned a barrier to cross-sector training, noting that cross-training is good, but cultural traditions between institution types may be a barrier (collections care vs. access, etc.)

None of the focus group participants said they had taken cross-sector training in the past three to five years (although some had mentioned that they took workshops from AAM and SAA earlier in the session). Time did not allow for much additional investigation on this question, but it is my belief as facilitator that most of the courses people had taken from the other cultural heritage associations were activity-based (digitization, grant writing, etc.) rather than specifically museum- or archives-based sessions.
When asked what topics they would be interested in if they were to take cross-sector training, the group provided seven suggestions:

- Intellectual property/copyright
- Funding of historic preservation
- Exhibit basics – development to implementation
- Virtual exhibits
- ATALM and regional organizations – education on tribal issues
- Basic preservation techniques when you aren’t a conservator/next-step preservation without doing damage – paper and art
- Cultural institutions + Convention and Visitors Bureaus + Heritage Tourism – what we can do

At the end of the session, when asked if cross-sector training would be beneficial to them professionally, to their organization, or both, all nine of the participants felt it would be very valuable both for them and for their organization.

**Overall findings**

The AASLH Focus Group session included a smaller, but extremely engaged group of participants who provided a great deal of information for our consideration.

AASLH focus group members utilized many cultural heritage associations as education providers. In both workshops taken and desired, personnel and management issues were of high interest, as were copyright and deaccessioning.

It was very interesting to see that AASLH focus group attendees with museum-related jobs were interested in learning the basics about libraries, and more library-related staff were interested in learning about museums. There was also a great deal of interest in better understanding I.T. and technical issues. Selection factors including cost, ease of attendance, and need were very important to this group.

In discussions related to cross-sector collaboration, all members of the group had participated in collaborative projects that reach across sectors, and were interested but had not yet participated in what they considered cross-sector education. The participants feel that cross sector education would be advantageous to both their organizations and to themselves.

**Trends and comparisons in findings – AASLH and SAA sessions**

Participants in both the August SAA and September AASLH focus groups were somewhat resistant to being placed in specific categories or groups.

Both SAA and AASLH participants utilize a wide variety of national and state education providers for CE/PD courses of many types. Both also expressed strong commitment to professional reading as a form of continuing education and professional development.

In both workshops taken, and topics desired for the future, as well as skills to be developed through CE/PD, AASLH participants desired more personnel-related types of courses vs. technical courses that were more
desired by those in the SAA focus group. However, AASLH participants want to learn how to work better with I.T. and technical staff.

There were commonalities between the two groups in the discussion of selection factors for CE/PD; both felt cost was a key factor, and need, whether felt, immediate, or proscribed, was also an important reason to choose.

Both groups had done cross-cultural collaborative projects, and saw advantage to both themselves and their organizations to take cross-cultural training. Few barriers were seen, but the clash of “cultural traditions” of preservation vs. access, discussed in the AASLH group, could be an important barrier to be aware of in future Coalition activities.
ALA Midwinter conference session: January 8, 2016 Top Line Report

Background and demographics

Tom Clareson and Laurie Gemmill Arp of LYRASIS, consultants on the Mapping the Landscapes focus group effort, held the third of four planned in-person focus group meetings at the American Library Association (ALA) Midwinter Conference in Boston, Massachusetts on January 8, 2016. About 20 people responded to the invitation to the event with questions and interest; 11 were confirmed to attend the session, and 8 people participated in the focus group. As focus group leaders, we often see a slight drop-off in attendance from confirmed numbers, particularly when the focus group is being held during a conference. This ALA Midwinter Conference provided difficult for people to attend as it was so early in the New Year.

An important part of the Mapping the Landscapes project, from the view of the principal investigators at Educopia Institute, is to have representation from the many subgroups that exist in the archives, library, museum, and historical society environment. While this focus group was advertised to a variety of ALA members via a number of the organization’s listservs, we found that some of the larger library types within the organization were most heavily represented in the final list of focus group participants. The eight participants in the session identified themselves as being affiliated with:

- Academic libraries – 5
- Public libraries – 1
- School libraries – 1
- Other affiliations
- Library consortium/special library – 1

The focus group consultants are promoting the virtual focus groups, to be held in January and February of 2016, to school and special library groups, especially, in order to ensure that the needs of these audience segments are heard.

Continuing education/professional development resources

When asked about the organizations they utilize for library continuing education/professional development (CE/PD) opportunities, the eight participants listed a total of 34 different providers. The leading providers mentioned were:

- American Library Association – 6
- Association of Southeast Research Libraries – 3
- Association of Research Libraries -- 3
- Association of College and Research Libraries – 2
- Association for Collections and Technical Services (ALA Division) -- 2
- Lynda.Com – 2
- Council on Library and Information Resources – 2
- Digital Libraries Federation – 2
- Rare Book School – 2
The other providers listed by attendees were mainly city-, state-, or region-based library associations and education organizations, as well as some national organizations focused on technology.

**Course topics – current and future**

When asked what types of Library CE/PD course topics they had taken in the past year, the group came up with a total of 25 answers. In an interesting divergence from the other focus groups during this project, no topic mentioned in response to this question had more than a single response, so all are listed here:

- Linked data
- Video production
- Russian language
- Collection selection
- Bib frame
- Text encoding initiative (tei)
- Digital humanities
- Library learning commons
- Balanced scorecard
- Cyber security
- Disaster preparedness
- Strategic management
- Productivity
- Freedom of Information Act (FOIA)
- Open access
- Program management
- Digital preservation
- Database management
- Exhibits
- Scholarly communication
- Informatics
- Conducting webinars
- Online teaching
- Excel
- Interlibrary loan

When the focus turned to Library CE/PD topics that the focus group participants would like to take in the next one to three years, there were a total of 30 topics suggested, but we saw some general agreement
among the participant group on popular class topics:

- Grant writing – 7
- “Next big thing” in the library field – 3
- Change management/acceptance – 2
- Mindfulness – 2
- Wordpress – 2
- Getting along with library staff and patrons – 2

The interest in personnel-related and professional-enrichment educational opportunities was high in the responses to this question.

Skills development

Participants were asked about the skills they hope to develop through CE/PD opportunities. Top responses (many very specific in nature) were:

- Licensing and Negotiation with Vendors – 3
- Concept Mapping – 2
- Dealing with Difficult Patrons – 2
- Data Cleanup – 1
- Time Management (Week-long management; for department) -- 1

In response to a later question on the skills participants wish to gain in order to remain on top of the developments in their field, the group referred back to this list of skills.

Professional development selection factors

Discussion on the factors that lead participants to select specific CE/PD opportunities elicited twelve total responses, but also brought forth the strongest level of agreement of any of the questions asked at the ALA Midwinter Focus Group session:

- Cost – 6 (comments on “per person vs. flat fee”)
- Location – 6
- Topic – 5
- Timing – 5
- Presenter – 4
- Sponsor – 3

So, while many of the “standard” answers to survey and focus group questions on why certain workshops are selected were mentioned by multiple participants, both the presenter of the sessions and the sponsoring organization for the sessions were also popular selection motivators.
Some of the other single-response factors listed are of interest as well, because they are, in many cases, new to the discussions held throughout the focus group series, or the respondents’ reasoning was more detailed in this session.

Additional responses to this question included:

- Length of time/duration (concern about too much/not enough)
- Group opportunities to learn together
- Skill base vs. new topic
- Format – web vs. face to face
- Past experience – good training experience
- Interest

**Collaboration and cross-sector training**

When asked if they, or their organization worked on collaborative projects across cultural heritage sectors (for example, libraries working with museums, archives, or historical societies), all eight of the participants said they have worked on cross-sector collaborative projects. The focus group members were eager to talk about the types of topics and training they had experienced, including:

- 3D printing and maker spaces
- Public Library and school working together on summer reading program
- Library/Museum/Public Broadcasting working together
- Exhibits
- Speaker series
- Digital library activity/digital training
- Museum and library oral history project
- Assessment of shared collections held between multiple institutions
- Multi-institutional projects on preservation, microfilming
- Museum and library partnering on museum passes
- Multiple institutions in community working on publications and programs related to Civil Rights

Following up on this part of the discussion, the focus group moderators asked the participants if they see any advantages to taking CE/PD that reaches across cultural sectors and is led by non-library organizations. All eight of the participants strongly agreed. As with the other focus group sessions, discussion was highly animated during this part of the focus group; there were a number of comments related to this question, but also agreement on the advantages:

- Establishing personal relationships
- Schools of Library and Information Science as potential partners
Many wanted to learn about other types of organizations:

- Museums 101 for Librarians – 8
- Archives 101 for Librarians – 6
- School and Education Issues for Librarians – 4

However, some of the participants mentioned barriers to cross-sector training.

- Archivists are interested more in preservation; librarians more in access
- Access to information in local museums
- Common terminology not used
- Need for librarians to learn how to teach at an academic level

Five of the focus group participants had taken cross-sector training in the past three to five years. There were some interesting discussion topics related to this question; the responses appearing in italics are quite different than those at the previous focus group sessions.

- Data visualization – 2
- Project management for archivists (SAA) – 1
- The library has provided grant assistance to humanities departments
- Discussion on library staff who have terminal degrees in another field. They may be active in fields such as digital humanities. Is there a possibility to have accelerated degrees if they already have some related experience or degree? Is there a new route for non-traditional librarians to get MLS standing?

Finally, when asked what topics they would be interested in if they were to take cross-sector training, the group provided thirteen suggestions, tying the SAA focus group for most responses. There were some interesting topics that the group suggested; some of the ideas were very detailed.

- Providing reference services across institution types
- Electronic Records – 1
- IT management – 1
- Moving collections – 1
- Digital humanities research – 1
- Ethnographic research – understanding user experiences – 1
- Cataloging non-traditional items (example: rocks) – 1
- Social Media – using online podcasts and other communications methods to draw attention to collections. Presenting exhibit/curator talks beyond a single event (record/use/retain). Use these methods to leverage work done – this was suggested by one participant but was popular with all in the group.
- Cross-cultural sensitivities – 1
- Metadata – 1
- Copyright for digitization – 1
• Ways to market what we do – 1
• Exhibits with tablets to submit comments/surveys/harvest contact information to be able to do targeted outreach later.

At the end of the session, when asked if cross-sector training would be beneficial to them professionally, to their organization, or both, all eight participants agreed it would be beneficial to both them and their organizations.

**Overall findings**

Some of the key topics that appeared throughout the discussion were training related to people/management skills and digital humanities/the digital environment (which had also been important issues in the two previous focus groups). Most of the ALA Focus Group participants had taken part in collaborative projects and saw advantages in collaboration, but they also mentioned some “fractures” in terminology, communications, and work styles between cultural heritage organization types that need to be addressed. Both focus group moderators noted the wide-ranging discussion and the high level of engagement by participants in this group; additionally, many of the participants expressed interest in receiving the final findings/report of the project.
AAM conference session: May 26, 2016 Top Line Report

Background and demographics
Tom Clareson and Laurie Gemmill Arp of LYRASIS, consultants on the Mapping the Landscapes Focus Group project, held the fourth of four planned in-person focus group meetings at the American Alliance of Museums Annual Conference in Washington, DC, on May 26, 2016. About 20 people responded to the invitation to the event with questions and interest; 16 were confirmed to attend the session, and 10 people participated in the focus group. As focus group leaders, we have seen a slight drop-off in attendance from confirmed numbers for all of the focus group sessions, particularly when the focus group is being held during a conference.

An important part of the Mapping the Landscapes project, from the view of the principal investigators at Educopia Institute, is to have representation from the many subgroups that exist in the archives, library, museum, and historical society environment. The ten participants in the session identified themselves as being affiliated with:
- Art museum/center -- 1
- History museum/historical society – 4
- Historic house/site – 1
- Specialized museums – 4

Continuing education/professional development resources
When asked about the organizations they utilize for Museum-related continuing education/professional development (CE/PD) opportunities, the participants listed a total of 21 different providers. The leading providers mentioned were:
- American Alliance of Museums – 8 (live and webinar opportunities)
- American Association for State and Local History – 3
- Virginia Association of Museums – 3
- American Alliance of Museums’ Education Professional Network (EdCom) -- 2
- EDCOM – 2
- New England Museums Association – 2
- Blogs – 2

The other providers listed by attendees were mainly state-, or region-based museum associations and education organizations, as well as some specialty-related national organizations focused on touring and traveling.
Course topics – current and future

When asked what types of Library CE/PD course topics they had taken in the past year, the group came up with a total of 19 answers. Many topics received more than one response:

- Project management – 4
- Best practices in museum education – 4
- Access issues (museums and libraries) – 3
- Communications -- 3
- Strategic planning – 2
- Evaluation -- 2
- Time management – 2
- Software – 2
- Leadership – 2
- Partnership – 2
- Fundraising – 2
- Community engagement – 2

When the focus turned to Museum CE/PD topics that the focus group participants would like to take in the next one to three years, there were a total of 23 topics suggested; we saw a little general agreement among the participant group on popular class topics (less so than many of the previous focus group sessions):

- How to be a better manager – 2
- How to be a better trainer -- 2
- Cross departmental collaboration (silo breakdown) – 2
- Board management/rethinking board structure -- 2
- Facilitating effective meetings – 2

The interest in personnel management-related and professional-enrichment educational opportunities was high in the responses to both the “have taken” and “want to take” questions.

Skills development

Participants were asked about the skills they hope to develop through CE/PD opportunities. Again, many responses were personnel and professional-related in nature. Top responses were:

- Facilitation and communication – 4
- Latest technology for museums – 3
- Budgeting -- 2
- Web Design – 2

In response to a later question on the skills participants wish to gain in order to remain on top of the developments in their field, the group referred back to this list of skills.
Professional development selection factors

Discussion on the factors leading participants to select specific CE/PD opportunities elicited 18 total responses, and also brought forth the strongest level of agreement of any of the questions asked at the AAM Focus Group session:

- Cost – 8
- Location – 5
- Is it at a museum I want to visit? -- 1
- Topic – 5
- Duration/length of time for class -- 4
- Timing/Availability/Calendar – 4
- Prefer in-person -- 3
- Follow up offered – 2
- Can I use the training? -- 2

So, while many of the “standard” answers to focus group questions on why certain workshops are selected were mentioned by multiple participants, replies related to follow-up and use were also popular selection motivators.

Some of the other single-response factors listed are of interest as well, because they are, in many cases, new to the discussions held throughout the focus group series, or the respondents’ reasoning was more detailed in this session, as it was at the ALA Midwinter session. Responses related to social/fellowship and mentoring issues. Additional answers to this question included:

- Presenter/instructor
- Who else might be there/fellowship
- Mentoring offered
- Personal enrichment
- Social exchange
- Will it be useful to my work team?
- How is it labeled (not allowed to attend some types of CE/PD)?
- Membership
- Accessibility online
- Part of a series/continuing offering
Collaboration and cross-sector training

When asked if they, or their organization worked on collaborative projects across cultural heritage sectors (for example, museums working with libraries, archives, or historical societies), all eight of the participants said they have worked on cross-sector collaborative projects. The focus group members were eager to talk about the types of projects they had worked on, including:

- Working with performing arts and cultural heritage groups (3)
- Museum working with library on an event
- Museum utilizing those from other sectors on committees
- Museum with library – New York Library Association joint exhibits
- Seeing multi-institution type funded projects through work with IMLS
- Focus Group participant had worked with museums as a consultant; she helps facilitate cross-sector collaboration
- Common missions around an issue
- Museum access issues – programs, collaborative training
- Events with nonprofits in the area (Dog Days of Summer)
- Working with local sites, national parks, school boards
- Collaborating with others as Twitter moderator

Following up on this part of the discussion, the focus group moderators asked the participants if they see any advantages to taking CE/PD that reaches across cultural sectors and is led by non-museum organizations. Seven of the participants strongly agreed. As with the other focus group sessions, discussion was highly animated during this part of the focus group; there were a number of comments related to this question, but also some level of agreement on the advantages and disadvantages:

Advantages:
- Four participants said they welcomed cross-cultural sector training and experiences
- Work around common issues such as race, incarceration
- Can consider necessary skills; look at risks, strengths, philosophies
- Reaching out to other cultural heritage types – Two saw as advantage
- Partnering with media, for-profits, entrepreneurs
- “The value is evident – there is a clear connection”
- Important for other institution types to learn from museums
- Getting input on what different audiences want to learn

“Challenges”/barriers/concerns:
- Calendar/timing
- Teachers not available during the day
- Differing expectations
• Slower/faster implementation depending on type of organization they are from (libraries faster; museums slower)
• Terminology
  • “Collaboration is a tricky beast”
• Transportation – difficult access
• Different scales of financial resources can make situations difficult
• Issues with government organizations difficult
• Differing levels of commitment can make collaboration difficult
• Some museums may have tunnel vision – focus on their museum and sub-specialty instead of beyond.

Six of the focus group participants had taken cross-sector training in the past three to five years. There was not a lot of discussion on topics taken as there had been in the other focus groups; participants seemed to be more interested in discussing what topics they would like to take if they were to participate in cross-sector training. The group provided 16 suggestions, the most responses of any of the four “live” focus groups in the series. There were some interesting topics that the group suggested; many of the ideas were very different from those in any of the previous live or virtual focus group sessions. Additionally, there were multiple people who agreed on some of the responses. All response categories are included in this report.

• Community involvement – 2
• Employment issues – 2
• Managing/supervision – 2
• Data gathering/management/interpretation -- 2
• Marketing
• Smaller organizations with human resources needs – collaboration across a cohort?
• Social media
• Disaster planning
• Supervising people
• Handling change (transition period)
• Intergenerational communication (working with millennials)
• Impact/audience/outcomes
• Program development and evaluation
• “Anatomy of working across organizations”
• Non-school-based learning
• How organizations can benefit from failure

At the end of the session, when asked if cross-sector training would be beneficial to them professionally, to their organization, or both, seven participants agreed it would be beneficial to both them and their organizations.
Overall findings

Many of the key topics that appeared throughout the discussion were related to people, professionalism, and management skills. Many of the AAM Focus Group participants had taken part in collaborative projects and saw advantages in collaboration, but they also mentioned some “challenges” in working between sectors (they intentionally discussed these factors as challenges rather than barriers) in the levels of expectations, financial resources, and commitment which different types of organizations can put into collaborations. Both focus group moderators noted the wide-ranging discussion by participants in this group, and the wide variety of topics covered in this group that had not been heard before in the three previous “live” and two previous virtual focus groups.

Note: An IMLS representative attended the first two-thirds of this session as an observer; the moderators do not feel that the attendee influenced any of the discussion, but wanted to record this in case of any concern about bias of discussions and answers.

Virtual Focus Group Session: January 26, 2016 Top Line Report

Background and demographics

Tom Clareson and Laurie Gemmill Arp of LYRASIS, consultants on the Mapping the Landscapes Focus Group project, held the first of two planned virtual/online focus group meetings on January 26, 2016. About 20 people responded to the invitation to the event with questions and interest; nine were confirmed to attend the session, and six people participated in the focus group. As focus group leaders, we often see a drop-off in attendance from confirmed numbers, particularly when the focus group is held online.

An important part of the Mapping the Landscapes project, from the view of the principal investigators at Educopia Institute, is to have representation from the many subgroups that exist in the archives, library, museum, and historical society environment. This focus group was advertised via a variety of cultural heritage organizations’ listservs, and attracted focus group participants from a variety of institution types. The six participants in the session categorized themselves as being affiliated with these institution types and subtypes:

- Libraries (2)
- State library (1)
- Academic library (1)
- Archives (3)
- Academic archives (2)
- Government archives (1)
- Historical society (1) (includes two museums and a research library)

The focus group consultants are promoting the second virtual focus group, to be held on February 25, 2016, to school and special library groups, especially, in order to ensure that the needs of those audience segments are heard.
Continuing education/professional development resources

When asked about the organizations they utilize for continuing education/professional development (CE/PD) opportunities, the six participants listed a total of 19 different providers. The leading providers mentioned, with multiple users, were:

- Society of American Archivists (SAA) (4) (two specific mentions of DAS courses)
- LYRASIS (3)
- New England Archivists (3)
- Image Permanence Institute (2)

The other providers listed by attendees were mainly city-, state-, or region-based library associations and education organizations, as well as some national organizations focused on technology; each only garnered one mention.

Course topics – current and future

When asked what types of CE/PD course topics they had taken in the past year, the group provided a total of 19 answers. Numbers of responses per topic are indicated below, and those without a number only had one response each:

- SAA Digital Archives Specialist courses (2)
- Leadership (2)
- Management/organizational management (2)
- Electronic records management (2)
- Google courses (respondent mentioned taking multiple Google courses)
- Community engagement
- Customer service
- Technology
- Information governance
- Preservation formats (DAS Class, being revised)
- Environmental monitoring
- Preservation and digitization classes
- Open Refine (free open source tool for data management)
- XML
- MODS
- Newspaper digitization
- WorldShare Management Services
- Adobe courses
- Refining presentation skills

Next, the focus of the discussion turned to CE/PD topics that the focus group participants would like to take in the next 1-3 years. A total of 15 topics were suggested, and some general agreement among the
participant group on popular class topics was evident, but many the topic ideas were quite detailed. All suggestions are included here:

- Bringing together multiple technologies/how they can work together (for example, DAMS, ArchivesSpace, CollectionSpace) (3)
- Grant writing/fundraising (2)
- Digital asset management/digital content management courses (2)
- Financial literacy (creating and maintaining budgets)
- “Leading from anywhere”
- Team building
- Communication
- SAA DAS courses
- Electronic records
- Leadership for cultural heritage institutions
- Organizing volunteers
- Role of archives/how it fits into the organization
- Advocacy
- Integrative records management courses (for records issues faced by all types of cultural heritage organizations)
- Working with diverse staff/users/faculty, especially non-traditional/under-represented groups

The interest in working with multiple technologies, as well as DAMs, was very high in the responses to this question, and in some of the extended discussion of this topic.

In continued discussion on this question, the group was asked if they wanted to take these courses because they “have to” (are required to for their job) or because they aspire to take courses on these topics. Four participants specifically said they were not required to take particular course by their employers (the two other participants did not specifically respond). The group discussed a number of “aspirational” courses:

- Development of educational resource materials for K-12 audiences
- Collections care courses
- Coding classes from CodeCamp
- Collaboration across agencies and organizations is important because it can help you “look at the broader picture, look outside of silos into other agencies and organizations.”
- Working together with other agencies which are “outside the norm” for cultural heritage organizations
- Leadership and management skills
- Grant writing and budgets
- Working with under-represented groups
- Web site design
- Advanced Adobe
In this additional discussion, then, the interest in course topics related to cross-cultural sector collaboration was high.

**Skills development**

Participants were asked about the skills they hope to develop through CE/PD opportunities. This question generated more discussion than it had in any of the “live” focus group sessions. The top responses (and many were very specific in nature) were:

- Continue to refine communication and listening skills
- Relationship building
- Dealing with ongoing technology changes as they arise
- Continual re-evaluation of what we are doing and whether it still works
- Being able to code well enough to utilize open source software for her organization without the help of tech support.
- Collaboration skills for working with partners from across the LAM landscape
- Skills in development of educational resource materials that use our institution’s collections
- Advocacy for archives based on communication and listening skills; how to advocate for oneself and for one’s collections based on various groups (other allied professionals, funding groups, donors - especially prospective or non-traditional donors - faculty and/or deans if one is in an academic setting, politicians, and especially to the public).
- Advocacy was a topic that five of the participants mentioned as being important.
- One advocacy example from a participant: In Connecticut, there are many tiny volunteer-run historical societies. The volunteers have little knowledge of archives. The Connecticut State Historical Records Advisory Board (SHRAB) has been working on training some of them. “Advocacy can also take the form of assisting smaller organizations.”

The focus on advocacy-related topics continued on in other parts of this group’s session.

**Professional development selection factors**

Discussion on the factors that lead participants to select specific continuing education/professional development opportunities elicited nine total responses, but, as has been true in many of the previous focus group sessions, brought forth the strong levels of agreement on decision-influencing factors. Those categories without a number listed received one response each.

- Cost (3)
- Location (2)
- Timing of session (2)
- Length of time/duration/time commitment to participate in session (2)
- Delivery mode/format (2)
- Interest/priorities of trainee (especially if course costs money) (2)
- Sponsor
- Individual performance goals
Many of the “standard” answers to past focus group questions on why certain workshops are selected were mentioned by multiple participants in this first virtual focus group, but of interest here were the responses tying factors in with performance goals and departmental plans.

**Collaboration and cross-sector training**

When asked if they or their organization had previously worked on collaborative projects across cultural heritage sectors (for example, libraries working with museums, archives, or historical societies), four of the six participants said they have worked on cross-sector collaborative projects. What was of most interest in this part of the discussion was the number, and wide variety of projects, in which the four session attendees had participated. The virtual focus group members were eager to detail the types of topics and training they had experienced, including:

- Libraries, archives, and museum working together for preservation training for staff in Idaho
- Shared digital collections and repository work with state library, along with programming on digital preservation
- Partnering with museums and historic sites on exhibits and educational programming
- One participant, who was relatively new to her position, knows that her organization has worked a bit with the local museum, and although she has not, she is hoping to begin collaborating shortly for numerous projects, including potential grants with other institutions.
- The organization is an archives/library/museum within one organization, so has internal collaboration
- Collaboration with Yale on a digital project
- Every year, collaborate with local historical societies on lecture series
- Collaborate on exhibits internally and with other institutions
- The organization has developed an IMLS application where they hope to collaborate with another historical society in the area on finding aids for papers divided between several institutions.
- One focus group participant said their primary mission was at their university, so they had limited external collaboration, but do provide primary resources and open space for faculty.
- Students doing archival digitization on campus and did research in archives
- Worked with school district judges for National History Day (two participants mentioned this)
- Work with religious organizations in organizing their records and archives
- Working with an African-American genealogical group
- Collaborate with their university’s history department.

Following up on these findings, the focus group moderators asked the participants if they see advantages to taking CE/PD offerings that reach across cultural sectors and are led by organizations outside of their specific cultural heritage institution type. All six of the participants strongly agreed. As with the previous sessions, discussion was highly animated during this part of the focus group. There were a number of
comments related to this question, and agreement on several of the advantages:

- Cross-pollination broadens perspectives for all, and enhances collaborative opportunities. (2)
- Learn where the professions overlap and we can pool resources rather than reinventing the wheel (2)
- Working across cultural sectors breaks down barriers for users. A single search portal for all collections helps because researchers currently don’t know what catalog to go to.
- There are a lot of departments/divisions at the university that the archives could work with, but are not organizations that archives typically work with, so collaboration could help to share ideas.
- Enhanced advocacy and raising awareness of cultural heritage profession among other stakeholders
- Become familiar with each other’s terminology, which helps in communications and outreach efforts.

Some of the participants also mentioned barriers to cross-sector training, but they also talked about ways to “leap over barriers.”

- Some people exhibit unwillingness to approach the CE/PD with an open mind, and realizing we are all special and unique and have similarities and commonalities.
- Time
- What would be financially feasible in other sectors may not be for an academic organization.
- Barriers may be put in place by our profession. If you are a certified archivist, you may not get the same number of recertification points by going to a CE course offered by a different field. However, if an organization offering a course goes to the Academy of Certified Archivists first, ACA will pre-assign a number of points.
- It is a challenge to have to address misunderstandings and reticence among allied professionals.
- “Some archivists may feel they cannot learn from librarians – I hated this when I saw it in colleagues”
- It is a barrier to try to learn about other educational opportunities from allied professions.

Four of the focus group participants had taken cross-sector training in the past 3-5 years. Topics taken included:

- Environmental monitoring
- Rare Book School
- Attending conferences in other sectors
- One participant had the opportunity to participate in collaborative cross-sector training when she worked in the Park Service because all of the divisions offered opportunities for people to learn in each of a variety of fields.
- Diversity-related trainings
- Genealogical research
- Oral history
• Customer service
• Accounting
• Managing stress

Finally, when asked what topics they would be interested in if they were able to take cross-sector training in the future, the group provided nine suggestions.

• Mentoring
• Coaching
• Statistical and assessment courses (2)
• Reaching the K-12 educational audience
• Metadata
• Data management planning
• Collection access
• Collaboration
• Reference help for researchers interested in artifacts and documents; how to safely present artifacts in that scenario; how to handle artifacts

At the end of the session, when asked if cross-sector training would be beneficial to them professionally, to their organization, or both, all six participants agreed it would be beneficial to both them and their organizations. However, one said that while “I believe strongly that it would be beneficial to both my organization and to myself...I am not a key decision maker; priorities are more about technology than supporting or managing people, and the environment is tough because of money and funding.”

Another more positive comment was that cross-sector training “would be helpful to my organization because it would create awareness of the archives, and the potential for us to work for others; it would be helpful for me because there may be ideas from other areas that I have overlooked or been unaware of.”

When asked at the end of the virtual focus group session for other opinions they would like to add about CE/PD issues, the participants added some excellent final comments.

• “Getting us out of our silos will benefit not only our organizations, but also society as a whole.”
• Organizations offering continuing education/professional development courses need to make sure they are publicized across fields.
• The efforts of the Coalition go a long way towards furthering the development of and access to CE/PD training across our various professions.
• “Historical societies are great places to look for examples of working across fields; they are kind of a microcosm of collections within an organization.”
• “I am not sure if it is possible, but is there a way to create a forum or course to discuss how archives/libraries/museums are viewed by the public – particularly by nontraditional groups (refuges, racial groups, etc.) with complicated histories – as we seek to collaborate and do outreach.” Two other participants strongly supported the idea of such a forum.
Because there had been interest in the topic in some of the earlier focus groups, a final probe question asked participants if professional reading was important to them as a method for continuing education and professional development. Four of the session participants said “yes,” one said “no,” and one did not answer.

- The participant who said “no” said they did professional reading in the beginning of their career, but have “found more inspiration in other fields and applied insights to their work instead.”
- One participant does a lot of professional reading, but like CE/PD, it often comes up when priority is raised. They use university interlibrary loan for books and seek out journals for information on technology.
- A participant said they were drawn more to blogs written by archivists, and their personal experiences in the workplace.
- One focus group participant said this was beyond the scope of their work and showed a “chasm or digital divide,” because they want to be able to read and keep up with technology and personnel issues, but often have to choose one or the other because of time and other obligations.

**Overall findings**

Some of the key topics which appeared throughout the discussion were the need for advocacy for cultural heritage collections and organizations, the benefits of cross-cultural projects and training, interest in courses that would help the participants integrate multiple technologies, and interest in grant writing and fundraising.

Most of the first virtual focus group participants had taken part in collaborative projects and saw advantages in collaboration, but they also mentioned some residual barriers between cultural heritage organization types which need to be addressed, particularly between archives and libraries.

Both focus group moderators felt that this focus group session had some of the widest-ranging discussion and the highest level of engagement by participants of any session throughout the project so far. Again, as with the ALA Midwinter focus group, at the end of the session, a number of the participants expressed interest in receiving the final findings/report of the project.
Virtual Focus Group Session: February 25, 2016 Top Line Report

Background and demographics

Tom Clareson and Laurie Gemmill Arp of LYRASIS, consultants on the Mapping the Landscapes Focus Group project, held the second of two planned virtual/online focus group meetings on February 26, 2016. Thirty people responded to the invitation to the event with questions and interest; 20 were confirmed to attend the session, and 16 people participated in the focus group. As focus group leaders, the moderators often see a slight drop-off in attendance from confirmed numbers, particularly when the focus group is held online.

An important part of the Mapping the Landscapes project, from the view of the principal investigators at Educopia Institute, is to have representation from the many subgroups that exist in the archives, library, museum, and historical society environment. This focus group was advertised via a variety of cultural heritage organizations’ listservs, and members of the project’s Focus Group Task Force and Advisory Committee also promoted the program to their constituents. As a result, the session attracted focus group participants from a variety of institution types. The 16 participants in the session categorized themselves as being affiliated with these institution types and subtypes:

- Libraries (8)
- State (government/special) library (3)
- Public library (4)
- Academic library (1)
- Library school (1)
- Archives (6)
- Academic archives (4)
- State (government) archives (1)
- Tribal archives (1)
- Historical society (1)

The focus group consultants promoted the session to school and special library groups, especially, in order to ensure that the needs of these audience segments were heard. In March, the consultants will work to review all institution types represented so far in sessions throughout the project to determine if there are other groups that needed to be reached.

Continuing education/professional development resources

When asked about the organizations they utilize for continuing education/professional development (CE/PD) opportunities, the 16 participants listed a total of 38 different providers.
The leading providers mentioned, with multiple users, were:

- Society of American Archivists (SAA) (6) (includes one specific mention of Preserving Digital Archives classes)
- Rare Book School (3)
- American Library Association (3)
- Connecting to Collections webinars, etc. (2)
- Rare Book and Manuscript Section, ALA (RBMS) (2)
- Public Library Association (2)
- Association for Library Collections & Technical Services (ALCTS) (2)
- LYRASIS (2)
- AMIGOS (2)
- iPRES (2)

The other providers listed by attendees were mainly state-, or region-based archival and library associations and education organizations, and only garnered one mention apiece.

**Course topics – current and future**

When asked what types of CE/PD course topics they had taken in the past year, the group provided a total of 17 answers. Numbers of responses per topic are indicated below; responses shown without numbers received one response each:

- Digital preservation/digital archives (3)
- Disaster planning (3)
- SAA Digital Archives Specialist courses (2)
- Digitization/digital collections (2)
- Managing African American collections
- Digital humanities (focus at RBMS)
- Knowledge Unlatched (?)
- NEH grant webinars
- Metadata
- Creating digital signs
- Oral histories
- Marketing your library
- E-Rate training
- Leadership
- Virtual reference
- Dealing with bedbugs
- Accountability
Next, the focus of the discussion turned to CE/PD topics that the focus group participants would like to take in the next 1-3 years. A total of 42 topics were suggested (one of the largest accumulations of data on this question at the focus group sessions so far), and while some general agreement among the participant group on popular class topics was evident, many of the topic ideas were quite detailed. All suggestions are included below. Again, those responses shown without numbers garnered one response apiece.

- Digital preservation (3 initial positive responses; many more during further discussion of this question)
- Metadata (2) (Boot Camp; Coding)
- Best practices for volunteers/creating & implementing volunteer-run projects (2)
- Web 2.0 tools for archives (2)
- Grant writing (2)
- Leadership
- Contract writing
- Teaching public libraries to care for archival materials
- Courses on data management and sharing MOOC
- Collaborating with community archives
- Managing change
- Delivery of digital archives
- Teaching with primary resources
- Library administration
- How to choose a content management system
- Open Refine
- Tableau
- Creating an online presence
- Basic MARC for small libraries
- How to start archives
- Practical steps to teach non-archivists
- Handling unpleasant customers or problem patrons
- Social media for special collections
- Assessment
- Records management
- E-mail management
- Managing audiovisual collections
- Intellectual property issues
- Digital repository showcase, geared toward institutions with limited funds
- Active shooter scenario
- Policies and procedures for managing reproduction requests including IP issues
• Original cataloging for small organizations
• Focused workshops on practical aspects of METS and MODS
• How small libraries can best use limited resources
• Drupal
• Server management
• Managing digital repositories
• Selection for digitization
• Choosing digitizing equipment
• Mini-grants
• Digitization practices
• Project Management Professional (PMP)

The interest in working with multiple formats, as well as on management issues, was high in the responses to this question, as well as in some of the extended discussion on this topic.

In continued discussion on this question, the group was asked if they wanted to take these courses because they “have to” (are required to for their job) or because they aspire to take courses on these topics. Four participants specifically said they were required to take particular courses by their employers; two said courses were not required; two said they were encouraged to take specific classes; and eight other participants did not specifically respond.

**Skills development**

Participants were asked about the skills they hope to develop through CE/PD opportunities. As with the first virtual focus group, this question generated more discussion than it had in any of the “live” focus group sessions. The 24 responses to this question (and many were very specific in nature) showed some agreement among group members on several topics, and included:

• Managing/administering digital collections (3) (including one specific mention of the “ability to deal with digital records from accession to access”)
• Assessment (3)
• Effective processing/more product less process (MPLP) for smaller institutions (2)
• Better teaching/course instruction skills (2)
• Change management/organizational change management (2)
• Digital preservation
• Managerial classes as a supervisor
• Technical skills
• More effective project management
• Management skills
• Conflict resolution
• Analyzing usage data and trends
• Within assessment, analytics
• Managing volunteers/interns/practicum students
• Implementing new technologies
• Coding skills
• Metadata
• Business planning
• Advocacy skills
• Budget management
• Grant writing
• Social media usage
• Teaching non-archivists to care for collections
• Working with donors
• Working with politicians

**Professional development selection factors**

Discussion on the factors that lead participants to select specific continuing education/professional development opportunities elicited the 18 total responses shown below. However, as has been true in many of the previous live and online focus group sessions, responses brought forth strong levels of agreement on decision-influencing factors:

• Cost (9)
• Location/distance from my site (5)
• Relevance/interest/priorities of trainee (5)
• Timing of session (4)
• Recommendations from peers (2)
• Delivery mode/format (2)
• Prefer more focused CE/PD (2)
• Length of time/duration/time commitment to participate in session
• Topic
• Sponsor
• Individual performance goals
• Departmental needs
• Availability on campus
• On-campus conversations about coming trends or interests
• Ideas sparked by past conference sessions
• Skills I didn’t receive in MLIS
• Public library license renewal
• Certification
Multiple participants in this virtual focus group mentioned many of the same “standard” answers given in the previous focus groups to questions on workshop selection, but of interest here were the selections based on license renewal, certification requirements, and on-campus discussions.

As a probe question, participants were asked if they as individuals, or their organization, pay for CE/PD training. Six said their organization pays; four said both their organization and they individually pay for some offerings. Two additional comments were that “the state library subsidizes some of CE/PD in the state,” and “there is almost no funding for CE/PD of any kind [at the focus group participant’s institution].”

Collaboration and cross-sector training

When asked if they or their organizations had previously worked on collaborative projects across cultural heritage sectors (for example, libraries working with museums, archives, or historical societies), 13 of the 15 focus group participants involved in this part of the discussion said they have worked on cross-sector collaborative projects. What was of most interest (and also different than the previous focus group sessions) in this part of the discussion was that multiple organizations had worked on similar types of collaborative projects with partners, including:

- Many working with local historical societies (3)
- Those in state agencies working with other agencies within state government (2)
- Area/regional digitization projects within their states, or statewide digitization projects (2)

Following up on these findings, the focus group moderators asked the participants if they see advantages to taking CE/PD offerings that reach across cultural sectors and are led by organizations outside of their specific cultural heritage institution type. All 15 of the participants strongly agreed. As with all of the previous sessions, discussion was highly animated during this part of the focus group. There were a number of comments related to this question, and agreement on several of the advantages:

- “Solutions others have developed may enhance innovation in our sector”
- “We can learn from outreach techniques, exhibition and programming methods”
- “LAMs are converging in terms of their basic responsibilities and activities”
- “Yes I think it is essential. It is an advantage for me because we are just developing this program at our organization and there are aspects that are relevant to archives, records management, museums, and the information profession more generally”
- “We love this at OhioDIG – our members come from across archives, libraries, museums, historical societies, and bring much”
- “Even though (a training session) may not say it is for archivists does not mean that you will not be able to use it.”

In addition to the advantages, the group also spoke about a variety of barriers/concerns/challenges to
cross-sector offerings, and there was agreement on several of these barriers:

- Terminology/jargon is often used differently between libraries, archives, and museums. (4)
- “Not-thought-of here bias” (2)
- Inability to appreciate different contexts in which different types of organizations work (2)
- Priorities of different organization types
- There are even problems in the applicability of some CE/PD between public library and academic library audiences.
- Resources allocations are often different.
- Levels of technology
- Access to resources

Eleven of the focus group participants had taken cross-sector training in the past 1-5 years; two had not had the opportunity yet. Topics taken included:

- Cooperation between libraries, archives, and museums
- Archivists who attended museum conference and training (2)
- Archivist who attended library training (2)
- Archivist who attended workshops for historical and genealogical societies
- Digitization/preservation workshops
- “Have taken an amazing leadership class with a business leader.”

Finally, when asked what topics they would be interested in if they were able to take cross-sector training in the future, the group provided 19 suggestions. This question generated some of the most active conversation of this whole focus group, and a lot of agreement on topics:

- “One thing I am interested in is pursuing courses in a field such as IT – particularly programming/coding, database management, but it is difficult because there is often a level of pre-learning/knowledge or experience required or the training doesn’t explain well how these skills can be practically applied to an archival setting.” In total, four (4) people expressed strong interest in coding/systems training.
- Museum collection management (2)
- Public speaking/“How to entertain a crowd. At a library we’re used to one-on-one interactions; leading a tour would be a different experience.” (2)
- Access to digital content
- Outreach for libraries, archives, and museums (LAMs)
- (Identifying) potential cross-sector projects
- Social media/marketing
- Digital preservation management
- 3-D digital photography of items
- How to display 3-D objects on your website
- Museum-style display
• LAM collaboration with public education
• Museums and archives collaboration
• Records management for small organizations
• Curation
• Advocacy
• Grant writing
• Implementing asset management systems
• “Rather than librarians taking courses for museums or archives and vice versa, it seems like it would be really useful to have courses like museum skills for librarians”

At the end of the session, when asked if cross-sector training would be beneficial to them professionally, to their organization, or both, 13 participants agreed it would be beneficial to both them and their organizations; two said it would be especially beneficial to them personally. Two participants added some helpful comments to this part of the discussion.

• “Technical skills would be particularly beneficial and valuable because we only have one IT staff member who doesn’t have many of the necessary skills for database, server, digital preservation and digital repository management work that we need.”
• “All cross-sector training that I have ever had has offered something that was helpful to me specifically. I think it then was able to help the organization with the broad spectrum of learning. From that, I think that more cross sector training would be a great idea for all professionals.”

When asked near the end of the virtual focus group session for other opinions they would like to add about CE/PD issues, a number of the participants added some helpful final comments. There was longer and more fruitful discussion on this question than at any of the other focus group sessions so far. Comments included:

• “CE/PD should focus on nuts and bolts issues and ideas that can be implemented locally.” Four people agreed on this.
• “I’d love to see these kind of conversations [on cross sector training and collaboration] happen at each of our different professional organizations [SAA, ALA, etc.]”
• “I think this [kind of discussion] helps to inform those in the position to create continuing education courses to offer sessions that are needed by the membership.”
• “Whatever ways [we] can constrain costs – my institution will support me but many small organizations cannot”
• “This might be too much to hope for, but workshops that come with follow-up support. Come with a project, spend workshop time getting set up, and then have follow-up check in and support.”
• Topics that are geared toward more experienced professionals
• Centralized locations for workshops and conferences to keep down travel cost, more travel grants
• “Ways to encourage organizations to be more supportive of CE/PD – especially smaller organizations”
• “Need to look at hybrid approaches to delivering content – in person and virtual. Offer topics in multiple formats complete with archived webinars with a way to contact the presenter afterward with follow up questions.”
• “So many good ideas lose momentum afterwards, whereas continued communication with the same people would be great.”
• “One of this group’s [the Coalition’s] webinars last year had an assignment and it prompted some really good work with my colleagues.”
• Two participants cited managing college politics as a training need.
• Federal records management training needed
• Copyright training needed

Because there had been interest in the topic in some of the earlier focus groups, a probe question asked participants if professional reading was important to them as a method for continuing education and professional development. Eight of the session participants said “yes,” two said “no,” and five did not specifically answer. Comments included:

• “Yes, but not anywhere near as much as I should!”
• “We have a departmental reading group to encourage staff to read professionally.”
• “It is critical to do professional reading, but it is becoming harder and harder to find the time to do it.”
• “All the agency directors have a book discussion; generally on a leadership topic.”
• “(Professional reading) is something that is really useful, but isn’t really credited as part of CE requirements. Seems like there should be a way to make that count.”
• “I see some informal groups online/twitter doing it.”
• “Our Library just started a Table of Contents service, and that is making it easier to see what is out there, of interest.”
• “Not many libraries can afford all of the professional journals, so that side of things also makes it hard.”

Overall findings
Some of the key topics which appeared throughout the discussion were the benefits of cross-cultural projects and training, interest in courses that would help the participants learn further about I.T., and interest in some personnel and management issues.

A majority of the first virtual focus group participants had taken part in collaborative projects and saw advantages in collaboration, but they also mentioned some residual barriers between cultural heritage organization types that need to be addressed.

Both focus group moderators felt that this focus group session had the widest-ranging discussion, and the highest level of engagement by participants, of any session throughout the project so far; it even went beyond the excellent results of the ALA Midwinter and first virtual focus group. Again, as with the ALA
Midwinter and first virtual focus group, at the end of the session, a number of the participants expressed interest in receiving the final findings/report of the project, as well as seeing if this type of discussion can continue in the future.
Data Collection Guides and Instruments
Focus Group Moderator’s Setup Guide

Authors: Tom Clareson, Laurie Gemmill Arp, LYRASIS
Co-Editors: Phaedra Livingstone, Kendra Morgan, Barbara Rothermel, Lisa Sjoberg
Initial Release 23 September 2016

Prepare invitation message for distribution

Sample E-mail Subject Line: Invitation - Conversation on Continuing Education/Professional Development at AAM

Greetings,

Please consider this opportunity if you are from a museum, or forward to your local museum contacts who might be attending the American Alliance of Museums conference.

A focus group on the continuing education/professional development needs across the museum, library, and archives communities will be held at the American Alliance of Museums (AAM) conference on Thursday, May 26, 4-5:30 pm at the Marriott Marquis Hotel, 901 Massachusetts Ave., NW, Washington, DC (room TBA).

The focus group, sponsored by the Coalition to Advance Learning in Archives, Libraries, and Museums (http://coalitiontoadvancelearning.org/) will discuss key education issues for museums, libraries, and other types of cultural heritage institutions. It is intended to be a small group, facilitating discussion among museum professionals in the field about their educational needs. The findings will inform the Coalition’s work to gather information about the needs across these communities.

For more information, or to register, please send your contact information, including name/organization/phone/e-mail to Laurie Gemmill Arp at laurie.arp@lyrasis.org, by 5 pm Eastern on Friday, May 6th.

Please note that space is limited to 20 participants, so please register early to ensure your attendance. Those received after the maximum number of participants has been reached will be added to a waitlist.

Points to consider

• Have someone proofread the invitation.
• Target your audience:
  o Send the invitation to those listservs relevant to the focus group; encourage others to share with pertinent groups; have colleagues or project partners distribute to appropriate listservs where possible.
  o Do not give meeting room information in the original message if you want to control registration.
• List a deadline with some extra days built in so that you can adjust the deadline later if needed.
• Maintain list of registrants; keep a wait list if registration numbers reach more than 20 in case people cancel and others can be added.
• Ask registrants to provide name, title, and contact info.
• As people register, review their title, affiliation, etc. to make sure they are the right fit for the focus group session. We wanted cultural heritage workers/practitioners, so we discouraged Coalition members, cultural heritage educators or continuing education/professional development providers, and funders who might want to observe. Some people also seemed to think the focus group was a session or panel discussion, so we tried to reiterate that it was an active, engaged focus group.
• Confirm registration and tell registrants we will follow up with a discussion guide (questions) a few days before the session date.

Sample confirmation message to participant

Hello (registrant name),

Thank you for your email and interest in this small discussion group. Please consider yourself registered. We will send out final room information and a draft discussion guide a few days before the session. We are looking forward to seeing you then!

Best wishes, (sender name)

Send a final confirmation message

• Three to seven days before the session, send a final confirmation message with room information and the discussion guide/questions.

Sample final confirmation message to participant

Hello (registrant name),

We are pleased to have you participating in the Focus Group at AAM: Conversation on Continuing Education. We are looking forward to a lively, discussion-oriented focus group.

I am attaching the discussion guide for the focus group. Hopefully, having the questions in advance provides you an opportunity to think about these ahead of time.

Our session will be held:

Thursday, May 26, 2016

4:00-5:30pm local time
Marriott Marquis Hotel: Tulip Room (Conference hotel)
901 Massachusetts Avenue NW, Washington DC 20001

If your plans change and you need to cancel your attendance, please let us know as soon as possible.
We look forward to seeing you later this week!

(Sender Name)

**Room set up**
- Arrive at the room at least 60 minutes before the session in order to set up.
- Have sign in sheet to confirm who attends (have pens available).
- Have name placards/table tents (we found first names in big writing helpful).
- Set up the room in a way that encourages discussion and allows participants to see each other well. We suggest a U-shaped arrangement of tables and chairs with participants facing the facilitator and a wall where flipcharts with notes can be posted.
- Have copies of the discussion guide/questions available for all participants.

**Refreshments**
- It is good if you can provide some refreshments for participants, even if it is just water.

**Focus group session staffing**
- One staff person to facilitate: This person should be good at encouraging people to feel comfortable talking.
- The facilitator should explain the focus group process/“ground rules” at the beginning of the session (confidentiality, etc.).
- One staff person to take notes: We did this publicly (i.e., used a big post-it note flipchart where a scribe would document answers for all to see). Doing so was helpful in case the scribe misunderstood a comment, but also so people could see other answers and confirm, which shows depth of answers.
- The scribe should try to write legibly. We used differently colored Sharpie pens to differentiate answers.
- Both the facilitator and scribe should be available to welcome participants. This sets people at ease.
- The facilitator should keep track of time and adjust questions as necessary.
Focus Group Moderator’s Discussion Guide Master Version

Author: Tom Clareson, LYRASIS
Co-Editors: Laurie Gemmill Arp, Phaedra Livingstone, Kendra Morgan, Barbara Rothermel, Lisa Sjoberg

Initial Release 23 September 2016

Begin the session with:

- Focus group and facilitator/scribe introductions
- Purpose of focus group session
- Process agreement
- Methodology
- Participant introductions

Questions for participants

1. With which of these affinity communities do you most closely identify yourself or your organization? (NOTE: This list was for the focus group held at the American Association for State and Local History conference. Depending on the group or association you are working with, research their subcategories and ask about appropriate groups.)
   - Corporate History
   - Court and Legal History
   - State Field Services Alliances
   - Small Museums
   - Religious History
   - Historic House
   - Military History
   - Women’s History
   - Other Affiliation

2. What organizations do you utilize for continuing education/professional development (CE/PD) opportunities? (Probe: This can include organizations and online services such as Lynda.com.)

3. What types of CE/PD course topics have you taken in the past year?

4. What kinds of CE/PD would you like to take in the next 1-3 years? (Additional probe question suggested by project task force, and asked if time allows: Are there classes you “have to” take? Are there classes you aspire to take?)

5. What skills do you wish to gain to remain on top of the developments in your field? What skills do you hope to develop through CE/PD opportunities? (NOTE: These were two separate questions during the focus group sessions, but are combined here because participants in the groups most often referred back to the first of the two questions. We would suggest a combined approach in the future.)

6. What factors lead you to select specific CE/PD opportunities? (Probe suggestions: timing – in conjunction with regional and national workshops; cost; topic; format; trainer; organization
offering the training; certifications; curriculum guidelines; competency requirements. Additional probe question suggested by project task force, and asked if time allows: Do you or your organization pay for your CE/PD coursework?)

7. Have you or your organization worked on collaborative projects across cultural heritage sectors (with museums, libraries, archives)? (NOTE: The sector names and order will change dependent upon the group you are working with.)

8. Do you see any advantages to taking CE/PD that reaches across cultural sectors and is led by organizations outside of the historical society field? What barriers do you see?

9. Have you taken cross-sector training in the past 3-5 years? (Probe: What topics were covered in this training?)

10. If you were to take cross-sector training, what topics would you be interested in?

11. Would cross-sector training be beneficial to you professionally, to your organization, or both?

12. What else would you like to add about CE/PD issues? (Additional probe question, added after response received in the first focus group: Is professional reading important to you?)
Survey Procedures Guide

Authors: Nathan Brown, Jessica Aurelia Carr, TrueBearing Consulting
Co-Editors: Amanda Focke, Eric Pourchet, Laurie Sather
Initial Release 6 July 2016

This Survey Procedures Guide is designed in order to assist future deployment of the survey and replication of results.

Survey conceptual model

In order to construct a survey capable of producing the data necessary for effective evidence based decision-making, the Project Team developed a survey conceptual model to delineate the relationships among the professional competencies that are the object of CE/PD, the drivers and barriers that may be present in either promoting or discouraging said competencies, and the outcomes and impacts expected as a result of improvement in competency. In addition, the model also incorporated the gap that may exist between reported competency and desired competency as well as confidence in specific competency areas.
Mapping the Landscapes CE/PD Needs Assessment
Survey Conceptual Model

Desired Professional Competencies and Attitudes
- Basic professional competencies
- Collection competencies
- Institutional management competencies
- Technology competencies
- Leadership competencies
- Public-facing competencies
- Individual confidence/motivation

Desired Institutional Characteristics
- Desired changes in professional attitude and behavior

Reported Professional Competencies and Attitudes
- Basic professional competencies
- Collection competencies
- Institutional management competencies
- Technology competencies
- Leadership competencies
- Public-facing competencies
- Individual confidence/motivation

Reported Institutional Characteristics
- Decision makers, CE/PD providers identify gaps, common needs, offerings, opportunities for collaboration within/across fields
- Identify and leverage innovation in CE/PD

Gap
Need/opportunity for CE/PD
Individual level

Outcomes
Increase in individual professional competencies as demonstrated in the workplace
Excellence in staffing, better equipped to lead and transform local communities
Quality of stakeholder experience improved

Impacts
Coordination of resources; greater efficiency
Better results within/across fields
Project informs decisionmaking re policy, institutional management
Funders, CE/PD hosts magnify impact of investments
Support a "nation of learners"

Drivers/Barriers
Individual
- Baseline skills
- Confidence
- Motivation
- Perceived need

Setting
- Institution size
- Sector-specific structure
- Geography
- Organizational climate
- Availability of CE/PD
- Level of resources available (number of staff, budget)
- Access to technology
- Employer support; incentives to engage in CE/PD
- Norms and expectations
- Access to collegial support
- Timing of work cycle: opportunities for CE/PD

External
- Perceived demand/need by public for services requiring new skills
- Access to inter-agency & cross-sector resources
- Sector-specific factors
- Scholarships, other external sources of funding
- Political/economic climate
Overview of survey structure

The survey structure maps to the Survey Conceptual Model domains, comprising the following areas:

1. Background and setting
2. Continuing education/professional development (CE/PD) engagement
3. Continuing education/professional development (CE/PD) opportunities
4. Specific competency areas (in which respondents were asked to select specific competency areas critical to their work)
5. Critical competency areas
   a. Basic
   b. Collections
   c. Institutional Management
   d. Technology
   e. Leadership
   f. Public-facing
6. Confidence (in which respondents were asked to indicate their confidence levels in the specific competency areas critical to their work)
7. Closing thoughts

These competency areas were identified by means of a systematic environmental scan of the professional competencies published by the primary professional associations for archives, libraries, museums, and historical societies. These competency lists were harmonized where appropriate, with feedback from members of each sector (on the Mapping the Landscape task force and advisory board) regarding nuances in language, and kept distinct where necessary. (Table 3).

For the full survey instrument, see page 153. Each competency area consisted of a series of matrix-style multiple-choice items, followed by two open-ended items in the following formats:

"Please share any thoughts you have about CE/PD needs in the area of __________ competencies."

"In the area of __________ competencies, please identify any specific CE/PD topics that would be useful preparation for your career plans (including those that may be in a different role and/or setting)."

Members of the Survey Task Force completed a qualitative coding process for responses to the first open-ended item for all six competency areas. See guide to this process and details regarding the methodology on page 22.

As a note for future survey efforts: we recommend reviewing the open-ended comments following each competency area, as well as the final open-ended item, for comments related to survey feedback. Such comments are an excellent source of suggestions to refine the survey instrument for future deployment.

Step-by-step summary of sampling methodology

A key goal for participant recruitment in this project was to obtain a representative sample of professionals within each of the archives, library, and museum sectors. This objective implied two closely related objectives: to ensure coverage in the recruitment effort across and within sectors (e.g., ensure geographic coverage), and to work towards a pool of respondents that reflect the makeup of each sector.
An initial constraint in the effort to achieve conventional objective representativeness was related to federal guidelines on confidentiality that place heightened requirements on projects with direct researcher access to subject demographic and contact information, including email addresses. This level of access would restrict some desired forms of data sharing.

A second constraint in determining statistical representativeness by conventional calculations is the lack of reliable data about the aggregate numbers of professionals in each sector.

Given these constraints, the project team adopted the following recruitment strategy:

- **Identify Key Distributors.** Members of the Assessing the State of the Field Advisory Board, the *Mapping* task force, and certain other key stakeholders identified key individuals across sectors (known as “distributors”), with whom they had personal relationships, and who were perceived to be well-placed institutional leaders to deliver survey invitations to professionals in their local setting.
  - The initial list of distributors was reviewed to ensure that sectors were fully represented in terms of areas of subspecialty as well as regional geographic location. Educopia worked with the advisory board and key individual leaders to address any gaps in coverage.
  - Note: in future survey administrations, we suggest that the list of distributors be reviewed and maintained as much as possible to preserve similar coverage to that of the first survey effort (with any necessary updates to staff/personnel contact information). To the extent that some coverage may have been lost, new potential distributors should be identified in consultation with sector leaders, keeping in mind the need for representativeness by sector, subspecialty, geography, and years in the profession where possible.

**Survey distributors**

- **Communicate to Key Distributors.** Once a comprehensive list of distributors was recruited, the distributors received training and messaging language via email to implement when the survey went live.
  - As described in the next section, during the survey’s live phase distributors sent out a standardized invitation message (as well as two follow-up reminders) to their network describing the purpose and benefits of the survey, and providing a link to take the survey itself.
  - Survey participation was anonymous, preserving confidentiality.
  - This strategy had the advantage of ensuring representative coverage of the invitations to participate and leveraging positive network relationships to maximize response rates, while preserving anonymity.
Step-by-step summary of response rate maximization strategy

TrueBearing initiated a best practices approach to maximizing response rate modified from approaches demonstrated by Dillman and others. This approach entailed several elements, including scheduled messaging from noted professional leaders across the LAM communities encouraging participation in the survey. The invitations provided information about the Coalition and its efforts, confidentiality will be described in these invitations and messages according to the parameters determined by the Mapping team.

Messaging comprised a “heads up” email to distributors to recruit them for assistance in distributing the survey; the survey invitation; and a reminder message as the survey deadline approached. In addition, a “Mapping the Landscapes Frequently Asked Questions” document was available online. See page 151 below, Mapping the Landscapes CE/PD Needs Assessment Survey Frequently Asked Questions.

In addition to the email-based distribution method, distributors were invited to spread the word about the survey via any appropriate social network channels they had available. Social media-specific messaging was provided for this purpose (both longer and shorter messaging, such as for Facebook or Twitter, along with shortened and full versions of web links).

Step-by-step summary of instruction on deployment of the survey

See page 24 for the survey deployment timeline. The survey deployment process began on February 24, with the first messaging sent out to distributors.

“Heads up” email. Prior to the survey launch, a preliminary “heads up” email was sent to the individuals identified on the distributor list. This email introduced the Mapping the Landscapes project and described the request being made of the distributors, asking for their participation. Recipients were asked to confirm participation via email (some individual follow-up was also done in the interest of time and efficiency).

Survey invitation. On March 1, distributors received an email containing the survey invitation along with suggested social media/newsletter messaging. The invitation was to be sent via email by the distributors on or around March 1, 2016, and access to the survey was provided online, via web link. The survey was delivered securely and available 24 hours a day for a 24-day period (March 1-24, 2016). Social media and newsletter messaging was at the discretion of the distributors over the course of the survey period, using the suggested messaging as needed.

Reminder message. On Monday, March 22, distributors received an email with the suggested reminder email message to be sent to the same list of their contacts as received the survey invitation.

Survey close. After the close of business Pacific time on March 24, the survey was closed.

Parameters for data export from within SurveyMonkey

The survey instrument and results may be viewed in SurveyMonkey itself; the “Analyze Results” tab provides first-order graphs. We recommend exporting the full data set to Excel if further exploration is desired.

TrueBearing has also provided a version of the Excel dataset on which the data visualization is constructed.

Survey distribution email messaging

"Heads up" email

February 24, 2016

Dear colleague:

I am reaching out to you to ask for your support on a project dedicated to something that you and I both value: supporting continuing education and professional development (CE/PD) in our profession.

As you may know, the Coalition to Advance Learning in Archives, Libraries and Museums is a cross-sector collaboration funded by the Institute of Museum and Library Services (IMLS). To strengthen CE/PD efforts across the LAMs, the Coalition is collecting nationwide, cross-sector data on individually expressed CE/PD needs both within and across these sectors and their diverse sub-sectors. I think you’ll agree that having access to accurate, up-to-date information on CE/PD needs is essential for all of us if we are to use our resources effectively, reduce duplication, and improve the quality, reach, and effectiveness of offerings.

This survey marks the first comprehensive effort that spans across America’s library, archives, and museum sectors to establish a national dataset of professional competencies and benchmarks, attitudes toward CE/PD, usage patterns, drivers and barriers for participation, and effectiveness of continuing education. You can read the FAQ about this project here [hyperlink].

We are preparing to launch our CE/PD needs assessment survey on March 1 and need your help.

In order to push the survey to the greatest number of professionals across the country, we must rely on key gatekeepers like you to spread the word and encourage the professionals in your organization to take the survey.

Specifically, I am asking you to do TWO things:

1. **On Tuesday March 1,** I will send you two emails:
   A survey invitation email that describes the project and contains a link that will take participants to the survey. **Please forward this email within 24 hours to every library, archives, or museum professional in your organization.** (I have contacted you in advance so you have time to ensure that an appropriate email list is ready.) You may insert your own personalization when you forward the email if you wish.

   Optional: I will also send you brief messaging appropriate for use in a newsletter, internal communications platform, or social media, if you wish. If you have access to a suitable channel to get this message out, you
may simply use the messaging you will find in the e-mail.

2. On Monday, March 22, I will send you a follow-up reminder to encourage participation before the survey closes on March 24. Please forward this email to the same list of your organization’s professionals immediately upon receipt.

The Mapping the Landscapes project has the potential to provide information about CE/PD that will be crucial at both the national and local levels. Your help in forwarding these messages in a timely way is essential to the success of this effort.

Thank you for considering this request. So that we have an accurate picture of the groups involved, please email <email address> by Monday, February 29 to confirm or decline your participation.

Best,

__________

Survey invitation email
March 1, 2016

Dear colleague:

You have been identified as a library, archives, or museum professional whose voice is needed in a national project to better understand continuing education/professional development (CE/PD).

The Mapping the Landscapes project is the first comprehensive effort to establish a national database related to CE/PD within and across the library, archive, and museum sectors. This project is a joint effort of the Coalition to Advance Learning in Archives, Libraries and Museums ("Coalition"), the Educopia Institute, and TrueBearing Consulting, funded through a federal grant from the Institute of Museum and Library Services (IMLS).

You are invited to complete the Mapping the Landscapes survey between now and March 24, 2016. This survey is designed to gather important information on common and unique individual wants and needs for CE/PD across these three sectors.

The information gained from this project will advance efforts to make CE/PD more relevant, accessible, and effective in supporting the professional development of you and your colleagues.

As a professional who relies on CE/PD resources, this is an opportunity for your voice to be heard! To take the survey right away, just click the following link:

Take the Mapping the Landscape Survey <hyperlink to survey URL>

If you want to learn more first, see the Frequently Asked Questions at this link:

Mapping the Landscape Frequently Asked Questions <hyperlink to FAQ URL>
The survey will be available until March 24, 2016. If you have any questions about this project, please contact Dr. Nathan Brown, Project Research Lead, at <email address>. Thank you for your interest and support of your profession.

Best,

Survey reminder email

Dear colleague:

A few weeks ago, you received an invitation to participate in the Mapping the Landscapes survey. If you are one of the many who have already completed the survey, thank you for being a participant in one of the largest responses to date for a survey on this topic. Your input will help to improve the relevance and quality of CE/PD across the libraries, archives, and museums professions.

If you have not yet completed the survey, please add your voice to those of your colleagues before the survey closes on Thursday, March 24th.

To take the survey now, just click the following link.

Take the Mapping the Landscapes Survey

If you want to learn more about this project, see the FAQs:

Mapping the Landscapes FAQs

For more information about this project, please contact Dr. Katherine Skinner, PI, at <email address>. Thank you for your interest and support of your profession.

Best,
**Survey frequently asked questions**

**What is this survey about?** Although continuing education or professional development (CE/PD) is clearly valued across libraries, archives, and museums, little common data across the three fields is currently benchmarked, collected or circulated about professionals’ CE/PD needs. This has created gaps in knowledge and documentation, leaving some potential collaborative CE/PD opportunities unknown.

This *Mapping the Landscapes* project is the first comprehensive effort that spans across America’s library, archives, and museum sectors to establish a national dataset of professional competencies and benchmarks, attitudes toward CE/PD, engagement patterns, and drivers and barriers for participation.

The information collected through this project will advance efforts to make CE/PD more relevant, accessible, and effective in supporting the professional development of you and your colleagues.

**Who is conducting the survey?** This survey is a joint effort of the Coalition to Advance Learning in Archives, Libraries and Museums ("Coalition"), the Educopia Institute, and TrueBearing Consulting, funded through a federal grant from the Institute of Museum and Library Services (IMLS).

**Why me?** We are attempting to make this survey available to as many library, archives, and museum professionals as possible, in order to better understand CE/PD needs across the wide diversity of people, communities, and professional contexts across the nation. In order to have the clearest understanding of the needs and attitudes towards CE/PD held by professionals like you, working in settings like yours, your participation is vital.

**Is my participation confidential?** Individually (or Personally) identifiable information will not be published, or shared outside the project research team. No efforts will be made to identify individual organizations or people through this project and Internet Protocol (IP) addresses will not be collected. All reports, dashboards, articles or summaries that come from this survey will be limited to aggregated information and non-identifying responses that cannot be associated with any particular individual.

**How long will this take?** The time required to complete the *Mapping the Landscapes* survey will take less than 20 minutes for most, although it varies from person to person. You can complete it in one session, or you can return to the survey later by using the same computer and web browser.

**How do I benefit?** The results of this survey should benefit all CE/PD learners by providing a vibrant knowledge source for the participating library, archives, and museum fields that can inform curriculum development efforts at national, professional, and local levels. If you are interested in learning more, a summary of survey results will be published at the project’s website ([https://educopia.org/research/mapping-the-landscapes](https://educopia.org/research/mapping-the-landscapes)).

The survey will be available from March 1 through March 24, 2016. Thank you for your interest and support of your profession. If you have any questions about this project, please contact Dr. Nathan Brown, Project Research Lead at <email address>. 
Additional survey dissemination messaging

Newsletter messaging:
Use/adapt this message to disseminate the survey via newsletters.

*Mapping the Landscapes survey seeks insights about continuing education/professional development needs*

Libraries, archives and museums have long histories of valuing continuing education and professional development (CE/PD). However, little common data across the three fields is currently benchmarked, collected or circulated regarding professionals’ CE/PD needs. This has created gaps in knowledge and documentation, leaving some potential collaborative CE/PD opportunities unknown.

The *Mapping the Landscapes* project is the first comprehensive effort to rectify this gap in our understanding of CE/PD needs and opportunities. Spanning across America’s library, archives, and museum sectors, this project seeks to establish a national dataset of professional competencies and benchmarks, attitudes toward CE/PD, engagement patterns, and drivers and barriers for participation. *Mapping the Landscapes* is funded through a federal grant from the Institute of Museum and Library Services (IMLS), and is a joint effort of the Coalition to Advance Learning in Archives, Libraries and Museums, the Educopia Institute, and TrueBearing Consulting.

As a professional who relies on CE/PD resources, this is an opportunity for your voice to be heard! The information collected through this project will advance efforts to make CE/PD more relevant, accessible, and effective in supporting the professional development of you and your colleagues. Please take about 20 minutes to complete the survey (individually -- or personally -- identifiable information will not be published, or shared outside the project research team).

To participate in the survey, just click the following link any time through March 24th:

Take the *Mapping the Landscapes* Survey < hyperlink to survey URL>

If you want to learn more about this project, see the Frequently Asked Questions at this link:

*Mapping the Landscapes* FAQs < hyperlink to FAQ URL>

Facebook/longer social media messaging
Use/adapt the message below to disseminate the survey link via social media outlets such as Facebook.

*Take the *Mapping the Landscapes* Survey and speak out on Continuing Education/Professional Development*

Continuing education/professional development (CE/PD) is an essential part of each of our professional lives, yet too little is known about how it is actually used and perceived in the library, archives, and museum professions. The *Mapping the Landscapes* project is the first comprehensive effort to rectify this gap in our understanding of CE/PD needs and opportunities, seeking to establish a national dataset of professional...
competencies and benchmarks, attitudes toward CE/PD, engagement patterns, and drivers and barriers for participation.

As a professional who relies on CE/PD resources, the *Mapping the Landscapes* survey is an opportunity for your voice to be heard! Please take about 20 minutes to complete the survey.

To participate in the survey, just click the following link any time through March 24th:

Take the *Mapping the Landscapes* Survey<hyperlinked to survey URL>

If you want to learn more about this project, see the Frequently Asked Questions at this link:

*Mapping the Landscapes* FAQs<hyperlinked to FAQ URL>

**Twitter/brief social media messaging:**
Use or adapt any/all of the messages below to disseminate the survey link via social media – each are 140 characters or fewer.

**Message 1:**

Library, archives and museum folks, your voices are needed! Take the *Mapping the Landscapes* CE/PD survey, ends 3/24: <short survey URL>

**Message 2:**

Help further understanding of CE/PD needs in your field – take the *Mapping the Landscapes* survey: <short survey URL>

**Message 3:**

Your input on this survey will help advance efforts to help make CE/PD more relevant, accessible, and effective: <short survey URL>
Survey Instrument

Authors: Nathan Brown, Jessica Aurelia Carr, TrueBearing Consulting
Co-Editors: Amanda Focke, Eric Pourchet, Laurie Sather
Initial Release 6 July 2016
Welcome!

Welcome to the Mapping the Landscapes Needs Assessment Survey. This survey aims to capture a comprehensive picture of the Continuing Education and Professional Development (CE/PD) needs expressed by individual learners both within and across the library, archives, and museum (LAM) communities. The Mapping the Landscapes project is an effort of the Coalition to Advance Learning in Archives, Libraries and Museums (“Coalition”) and the Edusopia Institute, and is funded through a federal grant from the Institute of Museum and Library Services (IMLS).

Your participation in this survey is voluntary, and your responses will not be tracked to you personally in any way. Your full and candid responses are very important to develop a full, accurate assessment of CE/PD needs among LAM professionals.

The survey takes approximately 20 minutes to complete. You can complete it in one session, or you can return to the survey later by using the same device and web browser. You can edit your responses until you complete the survey. Questions marked with an asterisk (*) are required.

Survey results will be used to publish documents to support the Coalition, its member institutions, and the broader library, archives and museum sectors in addressing current and emerging CE/PD needs. If you want to learn more about the survey, see the Frequently Asked Questions. For any other questions, you may contact our Project Consultant, Dr. Nathan Brown of TrueBearing Consulting, at nathan@truebearingconsulting.com.

Thank you very much for your time and support.

Please click the Next button below, indicating your understanding and acceptance of these terms, to begin the survey.
### Mapping the Landscapes
**CE/PD Needs Assessment Survey**

#### Background and Setting

* 1. The work I do is primarily as a/an:
   - Archives professional
   - Historical Society professional
   - Library professional
   - Museum professional
   - Other (a hybrid, please specify):

* 2. My immediate professional setting is a/an:
   - Archives
   - Historical Society
   - Library
   - Museum
   - Other (please specify):

* 3. Is your immediate professional setting situated within a larger organization? (e.g., a museum located within a university, or archives in a government agency)
   - Yes
   - No
<table>
<thead>
<tr>
<th>Mapping the Landscapes</th>
</tr>
</thead>
<tbody>
<tr>
<td>CE/PD Needs Assessment Survey</td>
</tr>
</tbody>
</table>

**Background and Setting**

4. Approximately how many employees work in your immediate professional setting? (Enter a whole number. If you don’t know, enter “don’t know.”)

[Blank]

5. Approximately how many employees work in the larger organization within which your professional setting is situated? (Enter a whole number. If you don’t know, enter “don’t know.”)

[Blank]
| Mapping the Landscapes  
CE/PD Needs Assessment Survey |
<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Background and Setting</strong></td>
</tr>
</tbody>
</table>

6. Approximately how many employees work in your immediate professional setting? (Enter a whole number. If you don't know, enter “don't know.”)
Mapping the Landscapes
CE/PD Needs Assessment Survey

Background and Setting

7. From the list below, select the postsecondary education that you have completed: (Check all that apply.)
   - [ ] Associate’s degree
   - [ ] Bachelor’s degree
   - [ ] Master’s degree
   - [ ] Professional or doctoral degree
   - [ ] Professional certificate

8. Including internships, how many years have you worked in this profession?
   - [ ] Less than 6 years
   - [ ] 6 - 15 years
   - [ ] 16 - 25 years
   - [ ] More than 25 years

9. What is your age?

10. What is the formal title of your position?

11. How many years have you been in your current position? (Please enter a whole number. Round to the nearest year; if less than one year, enter 1.)

   [ ]
### Mapping the Landscapes
#### CE/PD Needs Assessment Survey

**Background and Setting**

12. Enter the zip code for your primary workplace:

    **ZIP:**

13. With respect to funding for your professional setting as a whole, which of the following apply?

   - [ ] Primarily nonprofit funding (grants, individual/corporate donors, fundraising, endowment)
   - [ ] Primarily academic funding (either public or private/endowment)
   - [ ] Primarily public funding (Federal, state or local government funding)
   - [ ] Primarily for profit/corporate funding
   - [ ] I don’t know
   - [ ] Other (please specify):

14. Enter the approximate dollar amount that your employer contributed to your own CE/PD within the last 12 months, including any related travel expenses. (Enter a whole number with no symbols. If none, enter 0. If you don’t know, type “don’t know.”)
<table>
<thead>
<tr>
<th></th>
<th>Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>To improve my knowledge and skills for my current role</td>
<td></td>
</tr>
<tr>
<td>To prepare myself for advancement in my career</td>
<td></td>
</tr>
<tr>
<td>To meet requirements for a professional credential</td>
<td></td>
</tr>
<tr>
<td>To meet requirements or expectations for my institution or supervisor</td>
<td></td>
</tr>
<tr>
<td>To engage in networking opportunities</td>
<td></td>
</tr>
<tr>
<td>General professional interest and curiosity</td>
<td></td>
</tr>
<tr>
<td>To learn about emerging trends relevant to my role</td>
<td></td>
</tr>
</tbody>
</table>

Other (please specify):
17. In my professional setting, I experience the following:

<table>
<thead>
<tr>
<th>Description</th>
<th>Not at all true</th>
<th>Rarely true</th>
<th>Somewhat true</th>
<th>Completely true</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adequate level of CE/PD resources available (e.g., access to print or online</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CE/PD materials)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adequate level of funding/financial support for me to engage in CE/PD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adequate level of staff coverage for me to engage in CE/PD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A general expectation that everyone engage in CE/PD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Practical support from my supervisors or leadership to engage in CE/PD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Practical support from my colleagues to engage in CE/PD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Mapping the Landscapes
**CE/PD Needs Assessment Survey**

#### Continuing Education/Professional Development (CE/PD) Opportunities

18. Rate the following factors according to their importance in your selection of a CE/PD opportunity.

<table>
<thead>
<tr>
<th>Importance</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Geographic/physical proximity</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registration fee</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other costs of attending (travel, lodging, etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Felt need to develop a specific competency</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reputation of organizer offering the CE/PD opportunity</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reputation of instructor</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule fits with work/travel</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CE/PD topic specific to my sector</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Option to engage virtually in CE/PD</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (please specify):</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

19. How likely are you to use the following to engage in CE/PD?

<table>
<thead>
<tr>
<th></th>
<th>Very unlikely</th>
<th>Somewhat unlikely</th>
<th>Neither likely nor unlikely</th>
<th>Somewhat likely</th>
<th>Very likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-person CE/PD offerings</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Live virtual CE/PD offerings</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recorded CE/PD offerings</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CE/PD-related publications (e.g. professional newsletters, academic journals)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CE/PD-related online resources (e.g., websites, blogs, social media)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
20. Which of the following would enable you to benefit more from CE/PD? Select all that apply.

- [ ] More frequent CE/PD opportunities
- [ ] CE/PD topics that are more relevant to my role
- [ ] CE/PD topics that are more relevant to my knowledge/skill level
- [ ] More in-person CE/PD opportunities
- [ ] More live virtual CE/PD opportunities
- [ ] More free or less expensive CE/PD opportunities, or scholarships
- [ ] More CE/PD-related publications
- [ ] More CE/PD-related online resources
- [ ] Other (please specify):
<table>
<thead>
<tr>
<th>Competency Areas</th>
</tr>
</thead>
</table>

*21. On a regular basis, my role in the workplace involves the following areas (select all that apply):

- [ ] Collection development and/or acquisition
- [ ] Collection management, processing, and/or cataloguing
- [ ] Community engagement and outreach
- [ ] Development, grants, fundraising
- [ ] Digital resources
- [ ] Direct patron services and reference
- [ ] Education
- [ ] Exhibition
- [ ] Facility operations
- [ ] Financial management and budget
- [ ] IT services
- [ ] Organizational and strategic planning, evaluation
- [ ] Project management
- [ ] Research
- [ ] Senior leadership duties
- [ ] Supervision and/or Human Resources
- [ ] Other (please specify): [ ]
### Mapping the Landscapes
#### CE/PD Needs Assessment Survey

**Critical Areas: Collections**

For the following sections, you will be asked to identify the top areas that are most critical to success in your role. **You can select up to three of the following five areas.** Then, you will be asked to respond to questions about the top areas you select.

- Collections (e.g., acquisition, selection, processing, cataloguing, preservation, managing digital and physical resources)
- Institutional management (e.g., facility operations, supervision, Human Resources, financial management)
- Technology (e.g., computing and software systems, web design, networks)
- Leadership (e.g., organizational/strategic planning, senior leadership duties)
- Public-facing (e.g., patron services, community engagement, reference, exhibitions)

* 22. Is collections one of the top three areas critical to success in your role?  
  
  - [ ] Yes  
  - [ ] No
## Collections Competencies

The following questions ask you to indicate if you currently have specific knowledge and skills to successfully accomplish a range of collections-related tasks or if you see these as areas of potential improvement. The term "success" in the questions below refers to consistently accomplishing all tasks at a level that most knowledgeable colleagues in your sector would describe as "high quality."

Everyone has areas of strength and areas for improvement, and some skills do not apply to all roles. Being candid about your present skillset will best help this project to accurately report areas of need in CE/PD.

23. **Collection development**. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th></th>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Build collections of resources in many formats based on community needs</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Maintain collections of resources in many formats based on community needs</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Establish and apply identification, selection, authentication, and evaluation criteria to build high-quality and relevant collections</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Establish and understand collection development policies and procedures</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Ensure that collections are current, useful, and in good condition</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Collaborate on the development and implementation of a disaster management plan</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
24. *Physical collection management.* Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th></th>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organize, maintain, and evaluate the institution's physical resources</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop tools and systems that provide optimal control of and access to physical collections</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effectively organize individual collections (both intellectually and physically) in all media and formats</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sustain and improve physical collections over time</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

25. *Physical preservation principles and technical skills.* Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th></th>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish and implement appropriate actions for the <em>preservation</em> of my institution's materials (e.g., activities to minimize deterioration such as environmental conditions, storage, and handling)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Establish and implement appropriate actions for the <em>conservation</em> of my institution's materials (e.g., treatment, cleaning, mending/repair)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Integrate and implement administration activities to ensure the physical protection and authentication of collection materials and to assure their continued accessibility to researchers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Collections Competencies

**26. Digital collection management.** Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Activity</th>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organize, maintain, and evaluate the institution’s digital resources</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effectively organize individual digital collections, both intellectually and physically</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop tools and systems that provide optimal control of and access to digital collections</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Install, test, and understand digital curation software</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Integrate different tools into workflows, selecting and implementing appropriate curation tools to manage digital resources</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sustain and improve digital collections over time</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**27. Digital preservation principles and technical skills.** Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Activity</th>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish and implement appropriate actions for the preservation and conservation of my institution’s digital materials</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Integrate and implement administration activities to ensure the digital protection and authentication of collection materials and to assure their continued accessibility to researchers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Establish and implement policies and procedures for digitization of my institution’s resources</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Establish and implement policies and procedures for my institution’s born digital materials</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
28. Please share any thoughts you have about CE/PD needs in the area of collections competencies.


29. In the area of collections competencies, please identify any specific CE/PD topics that would be useful preparation for your career plans (including those that may be in a different role and/or setting).


### Mapping the Landscapes
CE/PD Needs Assessment Survey

**Critical Areas: Institutional Management**

Please identify the top areas that are most critical to success in your role. You can select up to three of the following five areas. Then, you will be asked to respond to questions about the top areas you select.

- Collections (e.g., acquisition, selection, processing, cataloguing, preservation, managing digital and physical resources)
- Institutional management (e.g., facility operations, supervision, Human Resources, financial management)
- Technology (e.g., computing and software systems, web design, networks)
- Leadership (e.g., organizational strategic planning, senior leadership duties)
- Public-facing (e.g., patron services, community engagement, reference, exhibitions)

*30. Is institutional management one of the top three areas critical to success in your role?*

- [ ] Yes
- [ ] No
### Mapping the Landscapes

#### CE/PD Needs Assessment Survey

**Institutional Management Competencies**

The following questions ask you to indicate if you currently have specific knowledge and skills to successfully accomplish a range of institutional management tasks or if you see these as areas of potential improvement. The term "success" in the questions below refers to consistently accomplishing all tasks at a level that most knowledgeable colleagues in your sector would describe as "high quality."

Everyone has areas of strength and areas for improvement, and some skills do not apply to all roles. Being candid about your present skillset will best help this project to accurately report areas of need in CE/PD.

31. *Facility design and management.* Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Task Description</th>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create and maintain a physical environment that encourages all patrons to use our institution’s resources, promoting community engagement and collaboration</td>
<td>☐</td>
<td>☒</td>
<td>☐</td>
<td>☒</td>
</tr>
<tr>
<td>Create and maintain a physical environment that complies with all health and safety laws and regulations, and addresses environmental responsibilities and emergency preparedness</td>
<td>☐</td>
<td>☒</td>
<td>☒</td>
<td>☒</td>
</tr>
<tr>
<td>Create and maintain a physical environment that performs smoothly, with the facility supplies and resources needed to support the activities of our institution</td>
<td>☐</td>
<td>☒</td>
<td>☒</td>
<td>☒</td>
</tr>
</tbody>
</table>

32. *Organizational planning, policies, and procedures.* Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Task Description</th>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand, apply and explain applicable laws</td>
<td>☐</td>
<td>☒</td>
<td>☒</td>
<td>☒</td>
</tr>
<tr>
<td>Develop policies and procedures based on the institution’s mission and user needs to guide efficient and effective institutional operations</td>
<td>☐</td>
<td>☒</td>
<td>☒</td>
<td>☒</td>
</tr>
<tr>
<td>Engage in deliberate and collaborative strategic planning, including appropriate goals, objectives and activities that reflect analysis of community needs</td>
<td>☐</td>
<td>☒</td>
<td>☒</td>
<td>☒</td>
</tr>
</tbody>
</table>
33. *Supervision and Human Resources.* Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Activity</th>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contribute to a productive workforce through effective recruitment and selection</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Lead and empower employees to deliver effective, high-quality service</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Establish effective strategies for performance management</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Understand and apply legal standards and requirements for performance management</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Work effectively with consultants and volunteers</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Plan for and support staff career development opportunities</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
### Mapping the Landscapes
#### CE/PD Needs Assessment Survey

**Institutional Management Competencies**

34. **Institutional affiliations.** Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th></th>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensure my institution’s credibility with respect to accreditation standards</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Ensure my institution’s credibility with respect to ongoing information and feedback from advisory bodies</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

35. **Financial management.** Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th></th>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand and employ basic budget and finance concepts and terminology</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Establish effective financial management processes and services, using sound business and financial judgment</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Identify and pursue multiple funding sources for my institution</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

36. Please share any thoughts you have about CE/PD needs in the area of **institutional management competencies**.
37. In the area of institutional management competencies, please identify any specific CE/PD topics that would be useful preparation for your career plans (including those that may be in a different role and/or setting).
Self-Identified Library, Archives, and Museum Professional Development Needs

### Mapping the Landscapes
CE/PD Needs Assessment Survey

**Critical Areas: Technology**

Please identify the top areas that are most critical to success in your role. You can select up to three of the following five areas. Then, you will be asked to respond to questions about the top areas you select.

- Collections (e.g., acquisition, selection, processing, cataloging, preservation, managing digital and physical resources)  Your response: [Q22]
- Institutional management (e.g., facility operations, supervision, Human Resources, financial management)  Your response: [Q33]
- Technology (e.g., computing and software systems, web design, networks)
- Leadership (e.g., organizational strategic planning, senior leadership duties)
- Public-facing (e.g., patron services, community engagement, reference, exhibitions)

* 38. Is **technology** one of the top three areas critical to success in your role?

- [ ] Yes
- [ ] No
### Technology Competencies

The following questions ask you to indicate if you currently have specific knowledge and skills to successfully accomplish a range of **technology tasks** or if you see these as areas of potential improvement. The term "success" in the questions below refers to consistently accomplishing all tasks at a level that most knowledgeable colleagues in your sector would describe as "high quality."

Everyone has areas of strength and areas for improvement, and some skills do not apply to all roles. Being candid about your present skillset will best help this project to accurately report areas of need in CE/PD.

#### 39. Core Technology. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand and perform basic functions and tasks of common operating systems, software programs, and basic computer hardware and peripherals</td>
<td>![Blank]</td>
<td>![Blank]</td>
<td>![Blank]</td>
</tr>
<tr>
<td>Understand and perform basic functions of email applications and web-based resources, including information literacy in search results and common security protocols (e.g., anti-virus, spam, cookies, usage policies)</td>
<td>![Blank]</td>
<td>![Blank]</td>
<td>![Blank]</td>
</tr>
<tr>
<td>Maintain awareness of commonly used technologies and apply technology effectively for ongoing learning and collaboration</td>
<td>![Blank]</td>
<td>![Blank]</td>
<td>![Blank]</td>
</tr>
</tbody>
</table>
40. *Intermediate/advanced technology.* Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Area</th>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand and operate automation systems</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Understand and operate enterprise computing systems</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Understand and operate network and security systems</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Understand and operate server administration systems</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Understand and conduct technology planning</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Understand and conduct web design and development</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

41. Please share any thoughts you have about CE/PD needs in the area of *technology competencies.*


42. In the area of *technology competencies,* please identify any specific CE/PD topics that would be useful preparation for your career plans (including those that may be in a different role and/or setting),


Mapping the Landscapes  
CE/PD Needs Assessment Survey

Critical Areas: Leadership

Please identify the top areas that are most critical to success in your role. You can select up to three of the following five areas. Then, you will be asked to respond to questions about the top areas you select.

- Collections (e.g., acquisition, selection, processing, cataloging, preservation, managing digital and physical resources)  Your response: [Q22]
- Institutional management (e.g., facility operations, supervision, Human Resources, financial management)  Your response: [Q34]
- Technology (e.g., computing and software systems, web design, networks)  Your response: [Q38]
- Leadership (e.g., organizational/strategic planning, senior leadership duties)  Your response: [Q38]
- Public-facing (e.g., patron services, community engagement, reference, exhibitions)  Your response: [Q38]

* 43. Is leadership one of the top three areas critical to success in your role?

- Yes
- No
### Leadership Competencies

The following questions ask you to indicate if you currently have specific knowledge and skills to successfully accomplish a range of **leadership tasks** or if you see these as areas of potential improvement. The term “success” in the questions below refers to consistently accomplishing all tasks at a level that most knowledgeable colleagues in your sector would describe as “high quality.”

Everyone has areas of strength and areas for improvement, and some skills do not apply to all roles. Being candid about your present skill set will best help this project to accurately report areas of need in CE/PD.

**44. Flexible and reflective thinking.** Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th></th>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Think innovatively about the mission and goals of the organization</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Accurately assess shortcomings and assets of the organization</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Recognize and implement opportunities for continuous improvement</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Think beyond the institution and current issues therein and consider the impact of the institution in the greater community and beyond</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Consider ideas, environments, and technologies that impact communities and the institution on a broader scale</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Show foresight by anticipating problems as well as opportunities</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
45. **Planning and making effective decisions.** Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effectively plan for both the short-term and long-term</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Identify clear, well-defined outcomes</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Use data systematically in making decisions and evaluating outcomes</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Assume responsibility for making critical decisions</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Show transparency in decision making</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

46. **Leading through change.** Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Build internal and external support for change</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Effectively work with others to keep any transitions or changes running smoothly</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Build relationships with community groups and constituents</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Foster an environment that encourages others to create solutions for their own problem</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
### Leadership Competencies

47. *Engaging, motivating, and inspiring.* Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Leadership Competency</th>
<th>Minor Need Improvement</th>
<th>Significant Need Improvement</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motivate individuals to actively contribute to the organization</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create an environment of trust and integrity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inspire others to think creatively about what might be, rather than just what is</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Encourage an environment of active communication</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Give and receive constructive feedback</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

48. *Cultural competence.* Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Leadership Competency</th>
<th>Minor Need Improvement</th>
<th>Significant Need Improvement</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exhibit an awareness of and appreciation for diverse cultures and beliefs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foster an environment where all cultures are respected and valued</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

49. Please share any thoughts you have about CE/PD needs in the area of leadership competencies.
50. In the area of **leadership competencies**, please identify any specific CE/PD topics that would be useful preparation for your career plans (including those that may be in a different role and/or setting).
Mapping the Landscapes
CE/PD Needs Assessment Survey

Critical Areas: Public-facing

Please identify the top areas that are most critical to success in your role. You can select up to three of the following five areas. Then, you will be asked to respond to questions about the top areas you select.

- Collections (e.g., acquisition, selection, processing, cataloging, preservation, managing digital and physical resources)  
  Your response: [Q22]
- Institutional management (e.g., facility operations, supervision and Human Resources, financial management)  
  Your response: [Q36]
- Technology (e.g., computing and software systems, web design, networks)  
  Your response: [Q38]
- Leadership (e.g., organizational or strategic planning, senior leadership duties)  
  Your response: [Q45]
- Public-facing (e.g., patron services, community engagement, reference, exhibitions)

*51. Are public-facing competencies among the top three areas critical to success in your role?

- [ ] Yes
- [ ] No
Mapping the Landscapes
CE/PD Needs Assessment Survey

Public-Facing Competencies

The following questions ask you to indicate if you currently have specific knowledge and skills to successfully accomplish a range of public-facing tasks or if you see these as areas of potential improvement. The term “success” in the questions below refers to consistently accomplishing all tasks at a level that most knowledgeable colleagues in your sector would describe as “high quality.”

Everyone has areas of strength and areas for improvement, and some skills do not apply to all roles. Being candid about your present skillset will best help this project to accurately report areas of need in CE/PD.

52. Patron services and access. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Competency</th>
<th>I have the knowledge and skills to do this</th>
<th>My knowledge and/or skills need minor improvement to do this</th>
<th>My knowledge and/or skills need significant improvement to do this</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand and respond to patron research needs and questions</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Use online tools and communities to engage with and provide services to users</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Define and implement outreach services for my institution’s community to increase use of institutional services and to reach underserved populations</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Design, implement and sponsor programs or initiatives that provide opportunities for information, entertainment, and/or lifelong learning</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Design and implement my institution’s services to meet the needs and interests of the community and patrons across their lifespan (e.g. young adults, seniors)</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
53. *Education and training*. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Task</th>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop and deliver educational, training and interpretation programs</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Provide effective training or assistance so users can understand and operate public access technology systems</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Develop and deliver publications and other information products</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Develop and deliver patron training</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
### Mapping the Landscapes
#### CE/PD Needs Assessment Survey

**Public-Facing Competencies**

54. *Community relations and outreach.* Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th></th>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demonstrate the impact and value of my institution to the community through ongoing evaluation and assessment of services</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Build support for my institution among a variety of groups, using the most appropriate methods</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Maintain positive public relations through communication, marketing and/or promotion of my institution’s values, services, accomplishments and needs to all stakeholders</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Build relationships with community organizations</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

55. Please share any thoughts you have about CE/PD needs in the area of **public-facing competencies**.

56. In the area of **public-facing competencies**, please identify any specific CE/PD topics that would be useful preparation for your career plans (including those that may be in a different role and/or setting).
### Basic Professional Competencies

This final competencies section asks you to indicate if you currently have specific knowledge and skills to successfully accomplish a range of **basic professional tasks** or if you see these as areas of potential improvement. The term “success” in the questions below refers to consistently accomplishing all tasks at a level that most knowledgeable colleagues in your sector would describe as “high quality.”

Everyone has areas of strength and areas for improvement, and some skills do not apply to all roles. Being candid about your present skillset will best help this project to accurately report areas of need in CE/PD.

57. **Research.** Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th></th>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use appropriate research methodologies in order to conduct effective research</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Use appropriate technological platforms to conduct effective research</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

58. **Project management.** Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th></th>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employ sound project management principles and procedures in the planning and implementation of programs and services</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Lead work teams with clear direction and effective communication</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Monitor project progress, evaluate outcomes, and adapt as needed</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
59. *Awareness of professional context.* Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th></th>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draw upon an awareness of the theoretical and historical underpinnings of my profession</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Draw upon basic professional models of practice in my profession/sector</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Participate in relationships with allied professions</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Utilize record-keeping models</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Draw upon professional standards and best practices</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
### Basic Professional Competencies

60. *Professional ethics.* Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draw upon the basic values and ethics of my sector (e.g., archives, library, historical society, museum)</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Draw upon an awareness of the laws, regulations, institutional policies, and ethical standards that are applicable to my sector (e.g., archives, library, historical society, museum)</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Promote a culture of ethics and accountability</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

61. *Communication.* Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communicate effectively using a variety of methods (face-to-face, digital, written)</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Communicate effectively with a variety of audiences and individuals from diverse backgrounds</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Select and apply the most appropriate and effective communication means to meet situational needs (including obtaining consensus, persuasion, instructing, and motivating) and apply techniques of active listening and asking open-ended questions</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
### Basic Professional Competencies

62. **Collaboration.** Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th></th>
<th>I have the knowledge and skills to do this successfully</th>
<th>My knowledge and/or skills need minor improvement to do this successfully</th>
<th>My knowledge and/or skills need significant improvement to do this successfully</th>
<th>This is not relevant to my work role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop and maintain effective relationships with others to achieve common goals</td>
<td>☐</td>
<td>☒</td>
<td>☒</td>
<td>☐</td>
</tr>
<tr>
<td>Work effectively in teams, using strong team-building skills and attitudes</td>
<td>☐</td>
<td>☒</td>
<td>☒</td>
<td>☐</td>
</tr>
<tr>
<td>Apply effective strategies to manage organizational politics, conflict and difficult coworker behaviors</td>
<td>☐</td>
<td>☒</td>
<td>☒</td>
<td>☐</td>
</tr>
</tbody>
</table>

63. Please share any thoughts you have about CE/PD needs in the area of **basic professional competencies**.


64. In the area of **basic professional competencies**, please identify any specific CE/PD topics that would be useful preparation for your career plans (including those that may be in a different role and/or setting).


65. Taking into account the demands and opportunities of your current role, rate your overall level of confidence in your skills in each of these areas.

<table>
<thead>
<tr>
<th>Area</th>
<th>Minimally confident within my role</th>
<th>Somewhat confident within my role</th>
<th>Mostly confident within my role</th>
<th>Fully confident within my role</th>
<th>Fully confident both within my role and in other sectors or settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collector development and/or acquisition</td>
<td><img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collection management, processing, and/or cataloguing</td>
<td><img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community engagement and outreach</td>
<td><img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Development, grants, fundraising</td>
<td><img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Digital resources</td>
<td><img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Direct patron services and reference</td>
<td><img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td><img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exhibition</td>
<td><img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facility operations</td>
<td><img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial management and budget</td>
<td><img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT services</td>
<td><img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organizational and strategic planning, evaluation</td>
<td><img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project management</td>
<td><img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research</td>
<td><img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Senior leadership duties</td>
<td><img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervision and/or Human Resources</td>
<td><img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (please specify):</td>
<td><img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /> <img src="image" alt="Circle" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
66. Please share any other thoughts that may help us understand your experience, needs, or priorities related to CE/PD.
Survey Interpretation Guide

Authors: Nathan Brown, Jessica Aurelia Carr, TrueBearing Consulting
Co-Editors: Amanda Focke, Eric Pourchot, Laurie Sather
Initial Release 6 July 2016

Outline of competencies taxonomy categories

1. **Basic professional competencies**
   a. Research
   b. Project management
   c. Awareness of professional context
   d. Professional ethics
   e. Communication and collaboration
   f. Other basic competencies

2. **Collection management competencies**
   a. Selection, acquisition, appraisal, processing of collection
   b. Digital collection management
   c. Cataloguing, arrangement and description
   d. Preservation principles and technical skills

3. **Technology competencies**
   a. Core technology competencies
   b. Intermediate/advanced technology competencies

4. **Institutional management competencies**
   a. Facility design and management
   b. Organizational planning, policies, procedure
   c. Supervision/Human Resources
   d. Institutional affiliations
   e. Financial management

5. **Public service competencies**
   a. Patron services and access
   b. Education and training
   c. External/community relations

6. **Leadership competencies**
   a. Flexible and reflective thinking
   b. Planning and making effective decisions
   c. Leading through change
   d. Engaging, motivating, and inspiring
   e. Cultural competency
Survey to competency crosswalk

This crosswalk is designed to facilitate interpretation of the Survey Viewbook and data visualization, specifically for the Competencies sections of the survey reporting. In the Viewbook and data visualization, shortened descriptors were used for the competencies items in the interest of efficient use of space and readability.

For readers who prefer to interpret the survey results with the full, original survey item language, this Glossary provides both the original item language (labeled “Survey Item” herein) alongside the shortened descriptor used in reporting (labeled “Field Name” herein).
### Basic Competencies

<table>
<thead>
<tr>
<th>Survey Item</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>57. Research.</strong> Given the requirements of my work role, I believe:</td>
<td></td>
</tr>
<tr>
<td>Use appropriate research methodologies in order to conduct effective research</td>
<td>Methodologies for research</td>
</tr>
<tr>
<td>Use appropriate technological platforms to conduct effective research</td>
<td>Technological platforms for research</td>
</tr>
<tr>
<td><strong>58. Project management.</strong> Given the requirements of my work role, I believe:</td>
<td></td>
</tr>
<tr>
<td>Employ sound project management principles and procedures in the planning and implementation of programs and services</td>
<td>Project management principles</td>
</tr>
<tr>
<td>Lead work teams with clear direction and effective communication</td>
<td>Lead work teams</td>
</tr>
<tr>
<td>Monitor project progress, evaluate outcomes, and adapt as needed</td>
<td>Monitor/ adapt project progress</td>
</tr>
<tr>
<td><strong>59. Awareness of professional context.</strong> Given the requirements of my work role, I believe:</td>
<td></td>
</tr>
<tr>
<td>Draw upon an awareness of the theoretical and historical underpinnings of my profession</td>
<td>Theoretical/ historical professional underpinnings</td>
</tr>
<tr>
<td>Draw upon basic professional models of practice in my profession/sector</td>
<td>Basic professional models of practice</td>
</tr>
<tr>
<td>Participate in relationships with allied professions</td>
<td>Relationships with allied professions</td>
</tr>
<tr>
<td>Utilize record-keeping models</td>
<td>Record-keeping</td>
</tr>
<tr>
<td>Draw upon professional standards and best practices</td>
<td>Professional standards and best practices</td>
</tr>
<tr>
<td><strong>60. Professional ethics.</strong> Given the requirements of my work role, I believe:</td>
<td></td>
</tr>
<tr>
<td>Draw upon the basic values and ethics of my sector (e.g., archive, library, historical society, museum)</td>
<td>Draw on basic values and ethics of sector</td>
</tr>
<tr>
<td>Draw upon an awareness of the laws, regulations, institutional policies, and ethical standards that are applicable to my sector (e.g., archive, library, historical society, museum)</td>
<td>Laws, regulations, inst'l policies, ethical standards</td>
</tr>
<tr>
<td>Promote a culture of ethics and accountability</td>
<td>Culture of ethics/ accountability</td>
</tr>
</tbody>
</table>
### Survey Item

61. Communication. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Survey Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communicate effectively using a variety of methods (face-to-face, digital, written)</td>
<td>Variety of communication methods</td>
</tr>
<tr>
<td>Communicate effectively with a variety of audiences and individuals from diverse backgrounds</td>
<td>Communicate effectively with diverse audiences</td>
</tr>
<tr>
<td>Select and apply the most appropriate and effective communication means to meet situational needs (including obtaining consensus, persuasion, instructing, and motivating) and apply techniques of active listening and asking open-ended questions</td>
<td>Situation-specific communication</td>
</tr>
</tbody>
</table>

62. Collaboration. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Survey Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop and maintain effective relationships with others to achieve common goals</td>
<td>Develop relationships to achieve common goals</td>
</tr>
<tr>
<td>Work effectively in teams, using strong team-building skills and attitudes</td>
<td>Work effectively in teams</td>
</tr>
<tr>
<td>Apply effective strategies to manage organizational politics, conflict and difficult coworker behaviors</td>
<td>Manage org, politics, conflict, difficult coworkers</td>
</tr>
</tbody>
</table>

### Collections Competencies

**Survey Item**

23. Collection development. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Survey Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Build collections of resources in many formats based on community needs</td>
<td>Build collections</td>
</tr>
<tr>
<td>Maintain collections of resources in many formats based on community needs</td>
<td>Maintain collections</td>
</tr>
<tr>
<td>Establish and apply identification, selection, authentication, and evaluation criteria to build high-quality and relevant collections</td>
<td>Establish/apply criteria</td>
</tr>
<tr>
<td>Establish and understand collection development policies and procedures</td>
<td>Policies and procedures</td>
</tr>
<tr>
<td>Ensure that collections are current, useful, and in good condition</td>
<td>Ensure collections quality</td>
</tr>
<tr>
<td>Collaborate on the development and implementation of a disaster management plan</td>
<td></td>
</tr>
</tbody>
</table>
24. Physical collection management. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Survey Item</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organize, maintain, and evaluate the institution’s physical resources</td>
<td>Physical resources</td>
</tr>
<tr>
<td>Develop tools and systems that provide optimal control of and access to physical collections</td>
<td>Control/access to physical collections</td>
</tr>
<tr>
<td>Effectively organize individual collections (both intellectually and physically) in all media and formats</td>
<td>Organize collections</td>
</tr>
<tr>
<td>Sustain and improve physical collections over time</td>
<td>Sustain collections over time</td>
</tr>
</tbody>
</table>

25. Physical preservation principles and technical skills. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Survey Item</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish and implement appropriate actions for the preservation of my institution’s materials (e.g., activities to minimize deterioration such as environmental conditions, storage, and handling)</td>
<td>Preservation activities</td>
</tr>
<tr>
<td>Establish and implement appropriate actions for the preservation of my institution’s materials (e.g., treatment, cleaning, maintaining)</td>
<td>Conservation activities</td>
</tr>
<tr>
<td>Integrate and implement administration activities to ensure the physical protection and authentication of collection materials and to assure their continued accessibility to researchers</td>
<td>Physical protection, authentication activities</td>
</tr>
</tbody>
</table>
26. Digital collection management. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Survey Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital resources</td>
<td>Organize digital collections</td>
</tr>
<tr>
<td>Control/ access to digital</td>
<td>Digital curation software</td>
</tr>
<tr>
<td>collections</td>
<td>Integrate tools into workflows, selecting and implementing appropriate</td>
</tr>
<tr>
<td></td>
<td>curation tools to manage digital resources</td>
</tr>
<tr>
<td></td>
<td>Sustain digital collections over time</td>
</tr>
</tbody>
</table>

Institutional Management Competencies

31. Facility design and management. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Survey Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Encourage patron use</td>
<td>Create and maintain a physical environment that encourages all patrons to</td>
</tr>
<tr>
<td></td>
<td>use our institution’s resources, promoting community engagement and</td>
</tr>
<tr>
<td></td>
<td>collaboration</td>
</tr>
<tr>
<td>Safe environment</td>
<td>Create and maintain a physical environment that complies with all health</td>
</tr>
<tr>
<td></td>
<td>and safety laws and regulations, and addresses environmental</td>
</tr>
<tr>
<td></td>
<td>responsibilities and emergency preparedness</td>
</tr>
<tr>
<td>Well-run environment</td>
<td>Create and maintain a physical environment that operates smoothly, with the</td>
</tr>
<tr>
<td></td>
<td>facility supplies and resources needed to support the activities of our</td>
</tr>
<tr>
<td></td>
<td>institution</td>
</tr>
</tbody>
</table>
32. Organizational planning, policies, and procedures. Given the requirements of my work role, I believe:

Understand, apply and explain applicable laws
Develop policies and procedures based on the institution’s mission and user needs to guide efficient and effective institutional operations
Engage in deliberate and collaborative strategic planning, including appropriate goals, objectives and activities that reflect analysis of community needs

33. Supervision and Human Resources. Given the requirements of my work role, I believe:

Contribute to a productive workforce through effective recruitment and retention
Lead and empower employees to deliver effective, high-quality service
Establish effective strategies for performance management
Understand and apply legal standards and requirements for performance management
Work effectively with consultants and volunteers
Plan for and support staff career development opportunities

34. Institutional affiliations. Given the requirements of my work role, I believe:

Ensure my institution’s credibility with respect to accreditation standards
Ensure my institution’s credibility with respect to ongoing information and feedback from advisory bodies

35. Financial management. Given the requirements of my work role, I believe:

Understand and employ basic budget and finance concepts and terminology
Establish effective financial management processes and services, using sound business and financial judgment
Identify and pursue multiple funding sources for my institution

Field Name

- Understand laws
- Policies/procedures
- Strategic planning
- Recruitment and selection of workforce
- Lead and empower employees
- Performance management strategies
- Performance management standards, requirements
- Work with consultants, volunteers
- Support staff career development

Field Name

- Institutional credibility
- Information, feedback from advisory bodies

Field Name

- Basic budget/finance understanding
- Financial processes
- Identify, pursue multiple funding sources
<table>
<thead>
<tr>
<th>Survey Item</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>39. Core technology. Given the requirements of my work role, I believe:</td>
<td>Basic computer functions and tasks</td>
</tr>
<tr>
<td></td>
<td>Basic functions of small and web-based resources</td>
</tr>
<tr>
<td></td>
<td>Apply technologies for learning/</td>
</tr>
<tr>
<td></td>
<td>collaboration</td>
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<thead>
<tr>
<th>Survey Item</th>
<th>Field Name</th>
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</thead>
<tbody>
<tr>
<td>40. Intermediate/advanced technology. Given the requirements of my work role, I believe:</td>
<td>Automation systems</td>
</tr>
<tr>
<td></td>
<td>Enterprise computing systems</td>
</tr>
<tr>
<td></td>
<td>Network and security systems</td>
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<td></td>
<td>Server administration systems</td>
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<tr>
<td></td>
<td>Technology planning</td>
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<td>Web design/ development</td>
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<td>Survey Item</td>
<td>Field Name</td>
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<tr>
<td>44. Flexible and reflective thinking. Given the requirements of my work role, I believe:</td>
<td></td>
</tr>
<tr>
<td>Think innovatively about the mission and goals of the organization</td>
<td>Innovative thinking about mission and goals</td>
</tr>
<tr>
<td>Accurately assess shortcomings and assets of the organization</td>
<td>Assess organizational shortcomings/assets</td>
</tr>
<tr>
<td>Recognize and implement opportunities for continuous improvement</td>
<td>Continuous improvement</td>
</tr>
<tr>
<td>Think beyond the institution and current issues therein and consider the impact of the institution in the greater community and beyond</td>
<td>Consider impact in community and beyond</td>
</tr>
<tr>
<td>Consider ideas, environments, and technologies that impact communities and the institution on a broader scale</td>
<td>Impactful ideas, environments, technologies</td>
</tr>
<tr>
<td>Show foresight by anticipating problems as well as opportunities</td>
<td>Anticipate problems/opportunities</td>
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<tr>
<td>45. Planning and making effective decisions. Given the requirements of my work role, I believe:</td>
<td></td>
</tr>
<tr>
<td>Effectively plan for both the short-term and long-term</td>
<td>Short-term/long-term planning</td>
</tr>
<tr>
<td>Identify clear, well-defined outcomes</td>
<td>Identify clear outcomes</td>
</tr>
<tr>
<td>Use data systematically in making decisions and evaluating outcomes</td>
<td>Evidence-based decision making</td>
</tr>
<tr>
<td>Assume responsibility for making critical decisions</td>
<td>Responsibility for decisions</td>
</tr>
<tr>
<td>Show transparency in decision making</td>
<td>Decisional transparency</td>
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<tr>
<td>46. Leading through change. Given the requirements of my work role, I believe:</td>
<td></td>
</tr>
<tr>
<td>Build internal and external support for change</td>
<td>Internal/external support for change</td>
</tr>
<tr>
<td>Effectively work with others to keep any transitions or changes running smoothly</td>
<td>Collaborate during change</td>
</tr>
<tr>
<td>Build relationships with community groups and constituents</td>
<td>Build community relationships</td>
</tr>
<tr>
<td>Foster an environment that encourages others to create solutions for their own problems</td>
<td>Environment that encourages problem solving</td>
</tr>
</tbody>
</table>
### Survey Item

#### 47. Engaging, motivating, and inspiring. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Survey Item</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motivate individuals to actively contribute to the organization</td>
<td>Motivate individuals to contribute</td>
</tr>
<tr>
<td>Create an environment of trust and integrity</td>
<td>Environment of trust and integrity</td>
</tr>
<tr>
<td>Inspire others to think creatively about what might be, rather than just what is</td>
<td>Inspire others to think creatively about what might be, rather than just what is</td>
</tr>
<tr>
<td>Encourage an environment of active communication</td>
<td>Environment of active communication</td>
</tr>
<tr>
<td>Give and receive constructive feedback</td>
<td>Constructive feedback</td>
</tr>
</tbody>
</table>

#### 48. Cultural competency. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Survey Item</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exhibit an awareness of and appreciation for diverse cultures and beliefs</td>
<td>Awareness of diverse cultures and beliefs</td>
</tr>
<tr>
<td>Foster an environment where all cultures are respected and valued</td>
<td>Foster an environment that respects cultures</td>
</tr>
</tbody>
</table>

#### 52. Patron services and access. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Survey Item</th>
<th>Field Name</th>
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</thead>
<tbody>
<tr>
<td>Understand and respond to patron research needs and questions</td>
<td>Respond to patron research needs</td>
</tr>
<tr>
<td>Use online tools and communities to engage with and provide services to users</td>
<td>Use online tools/ communities for user engagement</td>
</tr>
<tr>
<td>Define and implement outreach services for my institution's community to increase use of institutional services and to reach underserved populations</td>
<td>Outreach services</td>
</tr>
<tr>
<td>Design, implement and sponsor programs or initiatives that provide opportunities for information, education, entertainment, and/or lifelong learning</td>
<td>Opportunities for information, education, entertainment, lifelong learning</td>
</tr>
<tr>
<td>Design and implement my institution's services to meet the needs and interests of the community and patrons across their lifespan (e.g., young adults, seniors)</td>
<td>Needs, interests of patrons across lifespan</td>
</tr>
<tr>
<td>Survey Item</td>
<td>Field Name</td>
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<td>----------------------------------------------------------------------------</td>
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<tr>
<td>53. Education and training: Given the requirements of my work role, I believe:</td>
<td>Educational/ training/ interpretation programs</td>
</tr>
<tr>
<td></td>
<td>Public access technology</td>
</tr>
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<td></td>
<td>Publications/ other information</td>
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<tr>
<td></td>
<td>Patron training</td>
</tr>
<tr>
<td>Develop and deliver educational, training and interpretation programs</td>
<td>Demonstrate value of institution through evaluation</td>
</tr>
<tr>
<td>Provide effective training or assistance so users can understand and operate public access technology systems</td>
<td>Build support for institution</td>
</tr>
<tr>
<td>Develop and deliver publications and other information products</td>
<td>Communication, marketing, promotion of institution</td>
</tr>
<tr>
<td>Develop and deliver patron training</td>
<td>Relationships with community orgs</td>
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</tbody>
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<th>Survey Item</th>
<th>Field Name</th>
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<tbody>
<tr>
<td>54. Community relations and outreach: Given the requirements of my work role, I believe:</td>
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Raw Data and Visualizations
Focus Group Raw Notes Collection

Authors: Tom Clareson, Laurie Gemmill Arp, LYRASIS
Co-Editors: Phaedra Livingstone, Kendra Morgan, Barbara Rothermel, Lisa Sjoberg
Initial Release 30 May 2016

SAA conference session: August 20, 2015
- Introductions, Purpose of Focus Group Session, Process Agreement, Methodology

1. Which of these groups do you most closely identify yourself or your organization with?
   (NOTE: This session had twelve participants)
   - College and university archives – 4
     (one participant also said special collections; counted in both categories)
   - Corporate archives – 1
   - Government archives – 0
   - Religious archives – 0
   - Special collections – 3 (one participant also said Univ. Archives; one said this and historical societies; counted in both categories)
   - Museums – 2
   - Historical societies – 1 (one said this category and special collections)
   - Other categories
   - Public libraries/archives – 1
   - Digital asset management – 1

   NOTE: Many of the participants had real trouble selecting from these SAA-designated categories; many were resistant to categorize themselves; some made up new categories.

2. What organizations do you utilize for archival education continuing education/professional development (CE/PD) opportunities?
   - Society of American Archivists (SAA) – 10
   - Metropolitan New York Library Council (METRO) – 1
   - Archivists Round Table of Metropolitan New York, Inc. – 1
   - Mid-Atlantic Regional Archives Conference (MARAC) – 4
   - New Jersey State Library (NJS1) – 1
   - New Jersey Library Association (NJLA) – 1
   - American Library Association (ALA) – 4
   - American Library Association, Reference and User Services Association (ALA/RUSA) – 1
   - American Library Association, Library Information Technology Association (ALA/LITA) – 1
   - Society of Georgia Archivists (SGA) – 1
   - LYRASIS (and previously, SOLINET) – 5
• Digital Asset Management (DAM) Foundation – 1
• New England Archivists – 1
• OCLC Online Computer Library Center Inc. Webinars – 2
• Museum Computer Network (MCN) – 1
• American Society for Theatre Research (ASTR) – 1
• American Society for State and Local History – (AASLH) – 1
• DigCCurr/University of North Carolina – 1
• Archivists of Central Texas – 1
• Society of Southwest Archivists (SSA) – 1
• Texas Library Association (TLA) – 1
• MOOC – Coursera – 1
• MOOC – EDEX – 1
• MOOC – EVDAM – 1
• ARMA – 1
• Archives Conference (MAC) – 1
• Connecting to Collections Webinars – 1
• Conservation Center for Art & Historic Artifacts (CCAHA) – 1
• Institution – 1
• Academic Library Association of Ohio (ALAO) – 1
• Maryland Digital Library – 1
• American Historical Association (AHA) – 1
• Organization of American Historians (OAH) – 1
• Capital District Library Council, NY (CDLC) – 1
• New York Heritage – 1
• Northeast Document Conservation Center (NEDCC) – 1
• Mississippi Library Leadership Institute – 1
• Association of College and Research Libraries (ACRL), Rare Books and Manuscripts Section (RBMS) – 1
• Cleveland Archival Roundtable – 1
• Cleveland Digitization Consortia – 1
• Society of Ohio Archivists (SOA) – 1
• Archive-It – 1

3. What types of Archival CE/PD course topics have you taken in the past year?
   • Archive-It – 1
   • ArchivesSpace – 3
   • Project management (SAA) – 1
   • Advanced project management (SAA) – 1
- SAA digital archives specialist curriculum – 3
- Rare books training – 2
- Advocacy training – 2
- Digital humanities – 1
- Archives and library management issues – 1
- Digital Public Library of America (DPLA) Application Programming Interface (API) training – 1
- Omeka training – 1
- Student embedded research – 1
- Ruby on Rails – 1
- Search engine optimization – 1
- Encoded Archival Description (EAD) training – 2
- Grant writing – 1
- Audio preservation – 1
- Digital preservation – 1
- Copyright – 3
- Python programming – 1
- Digital forensics – 1
- Name authority training – 1
- Digital asset management training – 1
- Writing for librarians – 1
- General technical training – 1

4. What kinds of Archival education CE/PD would you like to take in the next one to three years?
- User experience – 3
- Principles of archival description – 1
- Digital forensics – 3
- Working with born digital materials – 4
- Working with video recordings – 3
- Change management – 1
- Advocacy – 4
- Archivespace – 2
- Contract management certification (state-based) – 1
- Omeka training – 2
- PHP – for Omeka, CMS – 1
- Ruby on rails – 1
- Museum and archival intersection training – 1
- Automated description and classification of electronic records
- Technical issue training – 1
• Encoded archival description training – 1
• Programs for students and the public – 1
• Copyright – 2
• Identification and care of photographs – 1
• Strategic planning – 2 (one for archivesspace workflow, one for a smaller repository)
• Archives and library management – 1
• Arrangement and description – 1
• Digital preservation – 1
• Rare book school – 1
• Digital humanities – 1
• Community partnerships – 1
• Outreach – 1
• Electronic records – assessment and retention – 1
• Library assessment – 1
• Assessment (general) – 1
• Reference – variety of classes needed – 1
• Google platform – 1
• Digitization – 1
• Management of students and volunteers – 1
• Nonprofit management program – 1

5. What skills do you hope to develop through CE/PD opportunities?

• Technical skills – 5
• Strategic planning to move concepts forward and advocate for them – 3
• Different tools – how to adopt them – 1
• Program in archival and collections interactive exhibits/museum studies – 1
• Business management (administration and budgets) – 1
• Leadership – 1
• Engage students better – 1
• How to be ethically persuasive – 2
• Digital humanities – adapt ideas from others and engage faculty better – 1
• Project management – 1
• External leadership – 2
• People management – general – 3
• People skills and people management – working with different constituents and stakeholders – 1
• Managing electronic records – 1
• “managing up”
• Community organizing (for the archival community; electronic records community) – 1

Group discussion at the end of this question:

• Need to learn how to work in the new paradigm
• The engineering management society has literature on management and people skills
• Interest in a professional fraternity/sorority dealing with archives work
• Interest in mentoring issues
• Interest in diversity issues

6. What factors lead you to select specific CE/PD opportunities?

• Instructor – 4
• Timing (for instance, with conference) – 4
• Schedule fits with work and travel – 4
• Geographic/Physical Location for in-person classes (example: Chicago) – 6
• Price – 6 (many respondent tied this to location/delivery/schedule issues)
• Skills learned
• Felt Need – 5
• How engaging the course is (synchronous vs. Asynchronous)
• Will this skill make me money? – 2
• Does Academy of Certified Archivists accept the course or not? – 1
• Free webinar vs. In-person commitment – 1
• Will it help me talk to peers? – 1
• Will it make me more marketable – CV/Next Job? – 1
• Format – web vs. In-person – 1
• Does this apply to my current job? – 1
• “I feel like I have taken courses on everything – is this information new?” – 1

Group discussion at end of this question:

• All participants regularly read about professional topics
• What do they read?
  • Technical journals
  • Newsletters from sections (visual materials; museum archives)
  • Book reviews
  • Online – Twitter – archival thought leaders are there.
• There is too much to read daily to manage reading in print materials.
• Workshops may be too dense with information
• In answer to the probe question, “do you or your organization pay for CE/PD,” six said their organization paid; four said they paid (these were mostly archival consultants, covering their own CE/PD costs).

7. What skills do you wish to gain to remain on top of the developments in your field?
   • Group felt they mostly answered this in Question 4.
   • Additional suggestions included:
     o New instruction and student engagement methods
     o Community outreach skills
     o Trends in Digital Humanities

8. Have you or your organization worked on collaborative projects across cultural heritage sectors (with museums, libraries, historical societies)?
   • Eleven of twelve participants said they have worked on cross-sector collaborative projects

9. Do you see any advantages to taking CE/PD that reaches across cultural sectors and is led by non-archival organizations? What barriers do you see?
   • Two participants initially said yes and the rest agreed
   • One participant mentioned barriers, specifically that general higher education classes which they took might be “too general” to address their needs, which are in the nonprofit/cultural heritage arena.
   • Comments related to this question:
     o We can learn “storytelling” from museums
     o One participant attends training offered by history organizations.
     o Many topics are interchangeable between LAM types and will probably coalesce in the future
     o Technical content – we have to go outside LAM boundaries to get it
     o Users work in cross-sector spaces; it is important for us to understand this and engage our users
     o to the source who does it best, learn it, and apply it (MBA programs mentioned).
     o Feeling that the fields are very fractured – when curating exhibits, there are appraisal differences
     o All fields are interested in the digital universe – they want to share things, but the fields are still fractured
     o All cultural heritage sectors are interested in descriptive practices and standards.
     o Archivist vs. Curator is an artificial distinction to the user.
     o DPLA – all sectors’ digital materials show up in DPLA, yet there are not descriptive best practices yet across the whole field.
     o One participant said continuing education in archives actually hurt them when applying for a library/museum job. There is a stigma to some of the training that can leave you stuck in your profession. Skill should be transferable – IS IT?
o Arrangement and description: is digital curation cherry picking? Need to protect basic archival principles
o Cross-sector work is driven by finances – we collaborate because money limits the resources LAMS have
o “We can’t have three systems” across libraries, archives, and museums
o Archivists are trying to protect their collections, not be non-collaborative
o Difficulty in the past when SAA tried certification in specific areas of the field. Should there be educational standards in the future?

o Is cross-sector work becoming easier because of the generational shift in archives workers?
o Working across sectors may help mid-career job changers. While some getting PhDs, others are using continuing education to enter a new profession without a new degree

o Cross-sector training can help in acculturation

10. Have you taken cross-sector training in the past three to five years?

• Topics taken included:
  o Digital preservation and conservation
  o Digital asset management
  o Computer science
  o Appraisal – looking beyond the field/scientific approach
  o Disciplinary training in the past had been non-transferrable; now the participant focuses on mainstream certification and can transfer skills (e.g., project management) to archival field.

11. If you were to take cross-sector training, what topics would you be interested in?

• Working with underserved populations including ADA population
• Training on large national projects (National Digital Newspaper Project an example given here)
• Overarching project management training
• Digital preservation for complex objects, video
• Reaching out to assisted living populations
• Cross-cultural collaboration – getting a 10,000-foot view of nonprofit institutions
• How to institutionalize collaboration and get out of silos
• Working with more types of materials; for instance, how to digitize textiles
• Digital humanities
• Metrics
• Fundraising
• Recruitment, retention, and student engagement tips
• Instruction tips
12. Would cross-sector training be beneficial to you professionally, to your organization, or both?
   • This type of training applies directly to the expectations put on a University Library.
   • Time did not allow for further discussion

13. What else would you like to add about Archives CE/PD issues? -- Did not have time to discuss this question
AASLH conference session: September 17, 2015

- Introductions, Purpose of Focus Group Session, Process Agreement, Methodology

1. Which of these groups do you most closely identify yourself or your organization with?
   (NOTE: This session had nine participants.)
   - Corporate history – 3
   - Court and legal history – 2
   - State Field Services Alliance – 6
   - Small museums – 5
   - Religious history – 2
   - Historic houses and sites – 5
   - Military history – 0
   - Women’s history – 3
   - Other Affiliations
     - Special libraries – 2
     - Government agencies – 5
     - Archives – 5
     - Native American program – 2
     - Historic preservation organization – 2
     - Heritage tourism organization – 2
     - National History Day – 1

   NOTE: Many of the participants had real trouble selecting from these AASLH-designated categories; many were resistant to categorize themselves; some identified themselves as belonging to several communities and some made up new categories.

2. What organizations do you utilize for continuing education/professional development (CE/PD) opportunities? (Note: Those responses shown without numbers received one response each.)
   - American Association for State and Local History (AASLH) – 8
   - American Alliance of Museums (AAM) – 5
   - Society of American Archivists (SAA) – 4
   - Connecting to Collections Care Online Community – 4
   - National Council on Public History – 3
   - National Association for Interpretation – 2
   - Western Museums Association – 2
   - Northeast Document Conservation Center (NEDCC) – 2
   - National Trust for Historic Preservation – 2
   - Software-Specific Vendor Training – 2
State Museum Associations (one each for AZ, TX, OH, OR, ID, WA assocs.)
Ohio Local History Alliance (OLHA)
Indiana Historical Society – 1
Association of Midwest Museums – 1
University of Texas at Austin – 1
Kentucky Department of Libraries – 1
Kentucky Library Association – 1
LYRASIS – 1
Midwest Archives Association – 1
Society of Indiana Archivists – 1
Indiana Landmarks – 1
Conservation Center for Art and Historic Artifacts – 1
Campbell Center – 1
American Institute for Conservation – 1
Field Services Alliance – 1
Verka Associates – 1
Visit Indy – 1
Pacific Northwest Historian’s Guild – 1
Women’s History Trail – 1
Texas Historical Commission – 1
University of British Columbia – 1

What types of CE/PD course topics have you taken in the past year? (Note: Those responses shown without numbers received one response each.)

- Professional leaflets/publications/professional reading/online resources – All
- Project management – 3
- Copyright (including digital image use) – 2
- Deaccessioning and collections management topics – 2
- Human resources – 2
- Section 106 training – 1
- Collections-based legal issues – 1
- Teaching with primary sources – 1
- Software training (e.g., Excel) – 1
- Object-focused training (C2C webinars) – 1
- Setting up/starting an archive – 1
- Interpretive writing -1
- Customer service – 1
- Readers advisory – 1
• Tech showcase – 1
• Electronic records – 1
• Leadership forum (CEO forum) – 1
• Volunteer/project management – 1
• Heritage tourism – 1
• Docent training – 1
• Rental event training – 1
• “Super Service” (offered by Super Bowl) – 1
• Museum and school partnerships – 1
• Social media – 1
• Grant writing – 1
• Grant management – 1
• Private fundraising – 1
• Emergency planning – 1
• Contract management – 1
• Museum computer network training – 1
• Historic home management – 1
• Museum management – 1
• Oral history training – 1
• Workman’s compensation tutorials – 1
• Software development – 1
• In-house communication – 1
• Film format identification – 1
• Structural safety for earthquakes – 1

4. What kinds of CE/PD would you like to take in the next one to three years? (Note: Those responses shown without numbers received one response each.)

• Basic information on library science/the library world (collaboration) – 4
• Leadership – 3
• Conflict management/resolution – 3
• Fundraising – including how to make “the ask” – 2
• Basic museum 101 for libraries – 2
• Managing from the middle – 2
• How kids learn beyond “learning styles” (education in context) – 2
• Human resources – 2
• Deaccessioning – 2
• Best practices for small archives – 1
• How to do history in volunteer organizations (relevance/outreach facilitation) – 1
• Which repositories to send folks to/how do we connect with other repositories – 1
• How to collaborate within the region and be relevant to many institutions/project-based regional collections – 1
• History relevance campaign – 1
• Social media (how does it apply to my organization) – 1
• How does social media relate to marketing and how to stay current – 1
• Who do I need on my team (technology) – 1
• I.T. (and its role in an organization’s success) – 1
• Technology (understanding cutting edge and how to describe) – 1
• Infrastructure (and how that drives the industry) – 1
• How to talk with/communicate with I.T. (how to speak the language) – 1
• Digital preservation/business continuity planning/disaster planning (for tech) – 1
• Mid-level professional development/middle management – 1
• (Free for certain topics is better) – 1
• How to collaborate – 1
• What’s the newest hot topic in our field – NOW! – 1
• Pop-up museums – 1
• Sensitivity training – 1
• How to collaborate with special communities of interest – 1
• Basic finance education 101 – 1
• Developing compelling public programs and evaluation – 1
• Communication styles – 1
• How to talk cross-departmentally – 1
• Learning styles – 1

5. What skills do you hope to develop through CE/PD opportunities? (Note: Those responses shown without numbers received one response each.)
• Digitization – 1
• Cemetery preservation – 1
• How to talk to administration/advocate for your own expertise and get them to listen and respect – 1
• Being able to sell what you do/how to write a bio etc. – 1
• Public presentation skills (how to engage your profession) – 1
• Gender awareness, especially as it relates to skills development – 1
• Women advocating for themselves professionally – 1
• Exhibit development in-house. – 1
• Digital design for all professionals - 1
6. What factors lead you to select specific CE/PD opportunities? (Note: Those responses shown without numbers received one response each.)
   - Cost – 16
   - Ease of attendance – 5
   - Proscribed need – 3
   - “The Relevance Argument to Administration” – 3
   - Time (one or a series of multiple classes; homework could be a problem) – 3
   - Immediate need – 2
   - Flexibility/asynchronous – 2
   - Reputation of provider organization – 2
   - Virtual – 1
   - Local vs. out-of-state – 1
   - Instructor – 1
   - Time of year – 1
   - Topic and anonymity – 1
   - During work hours – 1
   - Level of interactivity (if not, they will read) – 1

7. What skills do you wish to gain to remain on top of the developments in your field?
   - The group felt they answered this in question four.

8. Have you or your organization worked on collaborative projects across cultural heritage sectors (with museums, libraries, historical societies)?
   - All nine participants said they have worked on cross-sector collaborative projects.

9. Do you see any advantages to taking CE/PD that reaches across cultural sectors and is led by non-archival organizations? What barriers do you see?
   - All nine participants said there were advantages.
   - One barrier/concern mentioned: Cross-training is good, but cultural traditions may be a barrier (collections care vs. access, etc.).
   - Comments related to this question on advantages/positive aspects:
     - Outside training is good.
     - Special expertise is valuable.
     - Business training cross-cultural heritage classes may work.
     - Fundraising training with funders (communication)
     - Museums/Libraries/Archives on the same topic – learning goals – education

10. Have you taken cross-sector training in the past three to five years?
    - No participants said they had taken cross-cultural heritage training.
11. If you were to take cross-sector training, what topics would you be interested in?

- Intellectual property/copyright
- Funding of historic preservation
- Exhibit basics (development to implementation)
- Virtual exhibits
- ATALM and regional organizations (education on tribal issues)
- Basic preservation techniques when you aren’t a conservator/next-step preservation without doing damage (paper and art)
- Cultural institutions + convention and visitors’ bureaus + heritage tourism (what we can do)

12. Would cross-sector training be beneficial to you professionally, to your organization, or both?

- All nine participants agreed it would be beneficial to both them and their organizations.

13. What else would you like to add about CE/PD issues?

- It would be good to get proof of participation/certification.
- Participants stated they needed a clearinghouse of opportunities available - with their times and locations - over the course of a year.
ALA Midwinter conference session: January 8, 2016

- Introductions, Purpose of Focus Group Session, Process Agreement, Methodology

1. Which of these groups do you most closely identify yourself or your organization with? (NOTE: This session had eight participants.)
   - Academic libraries – 5
   - Public libraries – 1
   - School libraries – 1
   - Other affiliations
     - Library consortium/special library – 1

NOTE: As in past sessions, many of the participants had real trouble selecting from these ALA-designated categories; many were resistant to categorize themselves; and some identified themselves as belonging to several communities.

2. What organizations do you utilize for continuing education/professional development (CE/PD) opportunities? (Note: Those responses shown without numbers received one response each.)
   - American Library Association – 6
   - Association of Southeast Research Libraries – 3
   - Association of Research Libraries – 3
   - Association of College and Research Libraries – 2
   - Association for Collections and Technical Services (ALA Division) – 2
   - Lynda.Com – 2
   - Council on Library and Information Resources – 2
   - Digital Libraries Federation – 2
   - Rare Book School – 2
   - Digital Humanities Institute – 1
   - The Humanities and Technology Camp (THAT Camp) – 1
   - Code Academy – 1
   - Harvard Extension – 1
   - Harvard Leadership Program – 1
   - UCLA Leadership Program – 1
   - Rosetta Stone – 1
   - Frye Institute – 1
   - Boston Language Institute – 1
   - The Scholarly Publishing and Academic Resources Coalition (SPARC) – 1
   - Bureau of Educational Research and Development – 1
• Northeast Florida Library Information Network – 1
• Consortium of Academic and Research Libraries in Illinois (CARLI) – 1
• Memphis Area Library Association – 1
• Go-to-Webinar – 1
• American Society for Indexing – 1
• Tennessee Library Association – 1
• Connecticut Library Association – 1
• Illinois Library Association – 1
• Reaching Across Illinois Library System (RAILS) – 1
• Society of American Archivists (SAA) – 1
• National Information Standards Organization (NISO) – 1
• Center for Research Libraries – 1
• Connecticut Association of School Libraries (CASL) – 1
• Institute of the National Research Council of Italy (ISTI-CNR) – 1

3. What types of CE/PD course topics have you taken in the past year? (NOTE: No topics had more than one response.)

• Linked data – 1
• Video production – 1
• Russian language – 1
• Collection selection – 1
• Bib frame – 1
• Text Encoding Initiative (TEI) – 1
• Digital humanities – 1
• Library Learning Commons – 1
• Balanced scorecard – 1
• Cyber security – 1
• Disaster preparedness – 1
• Strategic management – 1
• Productivity – 1
• Freedom of Information Act (FOIA) – 1
• Open access – 1
• Program management – 1
• Digital preservation – 1
• Database management – 1
• Exhibits – 1
• Scholarly communication – 1
• Informatics – 1
• Conducting webinars – 1
• Online teaching – 1
• Excel – 1
• Interlibrary loan – 1

4. What kinds of CE/PD would you like to take in the next one to three years? (Note: Those responses shown without numbers received one response each.)

• Grant writing – 7
• “Next Big Thing” in the library field – 3
• Change management/acceptance – 2
• Mindfulness – 2
• WordPress – 2
• Getting along with library staff and patrons – 2
• Bib frame – 1
• Time management – 1
• Managing ILS migrations – 1
• Rare Book School – 1
• Collaboration – 1
• E-book publication formats – 1
• Self-publishing – 1
• Metadata – 1
• Linked data – 1
• Strategic planning – 1
• Team building – 1
• Management for introverts – 1
• Resource management – 1
• Database development – 1
• Excel – 1
• Active team membership – 1
• Assessment – 1
• Data driven decision making – 1
• Data-oriented scholarship/statistical interpretation – 1
• Interlibrary loan – 1
• Iliad – 1
• Business planning – 1
• Outcomes – 1
• WordPress – 1
5. What skills do you hope to develop through CE/PD opportunities? (Note: Those responses shown without numbers received one response each.)
   - Licensing and negotiation with vendors – 3
   - Concept mapping - 2
   - Dealing with difficult patrons – 2
   - Data cleanup – 1
   - Time management (week-long management; for department) – 1

6. What factors lead you to select specific CE/PD opportunities? (Note: Those responses shown without numbers received one response each.)
   - Cost (comments on “per person vs. flat fee”) – 6
   - Location – 6
   - Topic – 5
   - Timing – 5
   - Presenter – 4
   - Sponsor – 3
   - Length of time/duration (concern about too much/not enough) – 1
   - Group opportunities to learn together – 1
   - Skill base vs. new topic – 1
   - Format (web vs. face-to-face) – 1
   - Past experience (good training experience) – 1
   - Interest – 1

7. What skills do you wish to gain to remain on top of the developments in your field?
   - The group felt they answered this in question four.

8. Have you or your organization worked on collaborative projects across cultural heritage sectors (with museums, libraries, historical societies)?
   - All eight participants said they have worked on cross-sector collaborative projects. Projects included:
     - 3D printing and maker spaces
     - Public library and school working together on summer reading program
     - Library/museum/public broadcasting working together
     - Exhibits
     - Speaker series
     - Digital library activity/digital training
     - Museum and library oral history project
     - Assessment of shared collections held between multiple institutions


9. Do you see any advantages to taking CE/PD that reaches across cultural sectors and is led by non-archival organizations? What barriers do you see?

- **Advantages:**
  - Establish personal relationships
  - Schools of Library and Information Science as potential partners
  - Many wanted to learn about other types of organizations:
    - Museums 101 for librarians – 8
    - Archives 101 for librarians – 6
    - School and education issues for librarians – 4

- **Barriers/Concerns:**
  - Archivists interested more in preservation; librarians more in access
  - Access to information in local museums
  - Common terminology not used
  - Need for librarians to learn how to teach at an academic level

10. Have you taken cross-sector training in the past three to five years?

- Data visualization (2)
- Project Management for Archivists (SAA)
- Library has provided grant assistance to humanities departments
- There was discussion on library staff who have terminal degrees in another field. They may be active in fields such as digital humanities. Is there a possibility to have accelerated degrees if they already have some related experience or degree? Is there a new route for non-traditional librarians to get MLS standing?
11. If you were to take cross-sector training, what topics would you be interested in? (Note: All items received only one response each.)

- Providing reference services across institution types
- Electronic records – 1
- IT management – 1
- Moving collections – 1
- Digital humanities research – 1
- Ethnographic research (understanding user experiences) – 1
- Cataloging non-traditional items (example: rocks) – 1
- Providing online access – using online podcasts and other communications methods to draw attention to collections; presenting exhibit/curator talks beyond a single event (record/use/retain); use these methods to leverage work done. This answer was suggested by one participant, but was popular with all in the group. – 1
- Cross-cultural sensitivities – 1
- Metadata – 1
- Copyright for digitization – 1
- Ways to market what we do – 1
- Exhibits with tablets (to submit comments/surveys/harvest contact information to be able to do targeted outreach later) – 1

12. Would cross-sector training be beneficial to you professionally, to your organization, or both?

- All eight participants agreed it would be beneficial to both them and their organizations.

13. What else would you like to add about CE/PD issues?

- Assessment is missing from some webinars. Assessments should be done to determine quality and if they are worthwhile.
- Assessment should be done both immediately after, and three or six months after, the class/webinar. All participants liked this idea.
- Learning how to assess your work (outcomes) was a popular discussion topic.
- Differences in career experience and position level make a difference in the type and topics of training taken.
- Six participants said they regularly do professional reading and consider it part of their CE/PD.
- There was discussion on the need to have scientific research on generational differences in work/life balance because many think in stereotypes about millennials, etc.
AAM conference session: May 26, 2016

- Introductions, Purpose of Focus Group Session, Process Agreement, Methodology

1. Which of these groups do you most closely identify yourself or your organization with? (NOTE: This session had ten participants.)
   - Art Museum/Center – 1
   - History Museum/Historical Society - 4
   - Historic House/Site – 1
   - Specialized Museums- 4

2. What organizations do you utilize for continuing education/professional development (CE/PD) opportunities? (Note: Those responses shown without numbers received one response each.)
   - American Alliance of Museums – 8 (live and webinar opportunities)
   - American Association for State and Local History – 3
   - Virginia Association of Museums – 3
   - American Alliance of Museums’ Education Professional Network (EdCom) – 2
   - New England Museums Association – 2
   - Blogs – 2
   - New York Roundtable on Museum Education – 1
   - New York Chapter of Society of American Archivists – 1
   - Johns Hopkins University Continuing Education – 1
   - Leadership Experience and Development Conference – 1
   - Association of Science –Technology Centers – 1
   - Southeast Museums Conference (SEMC) – 1
   - Mid Atlantic Association of Museums (MAAM) – 1
   - Lynda.Com – 1
   - Student and Youth Travel Association – 1
   - American Bus Association – 1
   - Association of Fundraising Professionals – 1
   - Nonprofit Center for Excellence – 1
   - Webinars offered by consultants on fundraising – 1
   - Internal institutional sessions on project management, safety – 1
3. What types of CE/PD course topics have you taken in the past year? (Note: Those responses shown without numbers received one response each.)

- Project management – 4
- Best practices in museum education – 4
- Access issues (museums and libraries) – 3
- Communications – 3
- Strategic planning – 2
- Evaluation – 2
- Time management – 2
- Software – 2
- Leadership – 2
- Partnership – 2
- Fundraising – 2
- Community engagement – 2
- Working with volunteers – 1
- Social media – 1
- Board issues – 1
- Curriculum development (Common Core) – 1
- Disaster planning – 1
- Legal (copyright, NAGPRA, safety issues) – 1
- Dialog and idea-Sharing (particularly on controversial issues) – 1

4. What kinds of CE/PD would you like to take in the next one to three years? (Note: Those responses shown without numbers received one response each.)

- How to be a better manager – 2
- How to be a better trainer – 2
- Cross-departmental collaboration (silo breakdown) – 2
- Board management/rethinking board structure – 2
- Facilitating effective meetings – 2
- Effective engagement of staff – 1
- Communications – 1
- Organizational strategic planning – 1
- Succession – 1
- Human resources for the small organization – 1
- Staff management – 1
- Accessibility – 1
- Psychology and neuroscience – 1
- Impact (measuring and articulating) – 1
• Arbitration – 1
• Working with a small staff – 1
• Budgets – 1
• Informal learning (how people learn) – 1
• Surveying (better evaluation techniques) – 1
• Social media – 1
• Editing – 1
• Lifelong learning – 1
• Distance learning – 1

5. What skills do you hope to develop through CE/PD opportunities? (Note: Those responses shown without numbers received one response each.)

• Facilitation and communication – 4
• Latest technology for museums - 3
• Budgeting – 2
• Web design – 2
• Public relations/marketing/branding – 1
• Social media – 1
• Cross-pollination – 1
• Writing – 1
• Learning about people who go to museums and those who don’t – 1
• Distance learning (conducting, improving) – 1
• Managing millennials – 1
• Standing up for yourself – 1
• Saying “no” – 1
• Working with women who are leaders in the for-profit world – 1

6. What factors lead you to select specific CE/PD opportunities? (Note: Those responses shown without numbers received one response each.)

• Cost – 8
• Location – 5
  ○ Is it at a museum I want to visit?
• Topic – 5
• Duration/length of time for class – 4
• Timing/availability/calendar – 4
• Prefer in-person – 3
• Follow-up offered – 2
• Can I use the training? – 2
• Presenter/instructor – 1
• Who else might be there/fellowship – 1
• Mentoring offered – 1
• Personal enrichment – 1
• Social exchange – 1
• Will it be useful to my work team? – 1
• How the training is labeled (not allowed to attend some types of CE/PD) – 1
• Membership – 1
• Accessibility online – 1
• Part of a series/continuing offering – 1

7. What skills do you wish to gain to remain on top of the developments in your field?
   • The group felt they answered this in question four.

8. Have you or your organization worked on collaborative projects across cultural heritage sectors (with museums, libraries, historical societies)?
   • Seven of the participants said they have worked on cross-sector collaborative projects. Projects included:
     o Working with performing arts and cultural heritage groups – 3
     o Museum working with library on an event – 2
     o Museum utilizing those from other sectors on committees
     o Seeing funded projects through work with IMLS
     o Focus group participant work with museums (helping facilitate cross-sector collaboration)
     o Common missions around an issue
     o Museum access issues (programs, collaborative training)
     o Events with nonprofits in the area (Dog Days of Summer)
     o Working with local sites, national parks, school boards
     o Collaborating with others as a Twitter moderator

9. Do you see any advantages to taking CE/PD that reaches across cultural sectors and is led by non-museum organizations? What barriers do you see?
   • Four participants said they welcomed cross-cultural sector training and experiences.
   • Advantages:
     o Work around common issues such as race, incarceration
     o Can consider necessary skills; look at risks, strengths, philosophies
     o Reaching out to other cultural heritage types (2)
     o Partnering with media, for-profits, entrepreneurs
"The value is evident – there is a clear connection"
Important for other institution types to learn from museums
Getting input on what different audiences want to learn

- Barriers/Concerns:
  - Calendar/timing
  - Teachers not available during the day
  - Differing expectations
  - Slower/faster implementation depending on type of organization they are from (libraries faster; museums slower)
  - Terminology
  - "Collaboration is a tricky beast"
  - Transportation (difficult access)
  - Different scales of financial resources can make situations difficult
  - Issues with government organizations can be difficult
  - Differing levels of commitment can make collaboration difficult
  - Some museums may have tunnel vision (focus on their museum and sub-specialty instead of beyond).

10. Have you taken cross-sector training in the past three to five years?
   - Six participants said they had taken cross-sector training in the recent past.

11. If you were to take cross-sector training, what topics would you be interested in? (Note: Those responses shown without numbers received one response each.)
   - Community involvement – 2
   - Employment issues – 2
   - Managing/supervision – 2
   - Data gathering/management/interpretation – 2
   - Marketing
   - Smaller organizations with Human Resources needs – collaboration across a cohort? – 1
   - Social media – 1
   - Disaster planning – 1
   - Supervising people – 1
   - Handling change (transition period) – 1
   - Intergenerational communication (working with millennials) – 1
   - Impact/audience/outcomes – 1
   - Program development and evaluation – 1
   - "Anatomy of working across organizations" – 1
   - Non-school-based learning – 1
   - How organizations can benefit from failure – 1
12. Would cross-sector training be beneficial to you professionally, to your organization, or both?
   • Seven of the participants agreed it would be beneficial to both them and their organizations.

13. What else would you like to add about CE/PD issues?
   • Seven participants said they regularly do professional reading and consider it part of their CE/PD.
   • “We need to train boards and executive directors on the value of training.”
   • CE/PD should not be seen as a liability (support in budgets).
   • Cross-sector training allows for a larger and more mixed audience, and provides more confidentiality for people to express their opinions.
   • Continuing education is the first service to be cut.
   • For-profits get training to be excellent. The cultural heritage world needs excellent staff.
   • More of these conversations are needed. We can identify commonalities more effectively.
   • Professional writing is also important; we should have more outlets.
   • Concern about the preservation of online discussions and blogs for long-term access
   • Need for guides/mentors when new to the field (can help “shift expertise” to those new in field)
   • One participant felt stymied in her position. Is there a possibility to do a mid-career level internship/sabbatical/swap with another museum?
   • Concern that through conference presentations we are “giving away” CE/PD and others do not value it.
Virtual focus group session 1: January 26, 2016

- Session Introduction, Purpose of Focus Group Session, Process Agreement, Participant Introductions

1. Which of these groups do you most closely identify yourself or your organization with? 
(NOTE: This session had six participants.)

- Libraries – 2
  o State library – 1
  o Academic library – 1
- Archives – 3
  o Academic archives – 2
  o Government archives – 1
- Historical Society (1) (includes two museums and a research library)

2. What organizations do you utilize for continuing education/professional development (CE/PD) opportunities? (Note: Those responses shown without numbers received one response each.)

- Society of American Archivists (SAA) – 4 (two specific mentions of DAS courses)
- LYRASIS – 3
- New England Archivists – 3
- Image Permanence Institute – 2
- PCI (People Connect Institute) webinars
- Public Library Association
- Pacific Northwest Library Association
- Interaction Associates
- Simmons College GSLIS continuing education courses
- Idaho Library Association
- InfoPeople
- National Association of Government Archives and Records Administrators (NAGARA)
- Council of State Archivists
- Association for Information and Image Management (AIIM)
- Academy of Certified Archivists
- New England Museum Association
- Local library system and history museum classes (Chattanooga)
- Oral History Association
- Adobe
3. What types of CE/PD course topics have you taken in the past year? (Note: Those responses shown without numbers received one response each.)

- SAA Digital Archives Specialist courses – 2
- Leadership – 2
- Management/organizational management – 2
- Electronic records management – 2
- Google courses (participant mentioned taking multiple Google courses)
- Community engagement
- Customer service
- Technology
- Information governance
- Preservation formats (DAS class, being revised)
- Environmental monitoring
- Preservation and digitization classes
- Open refine (free open source tool for data management)
- XML
- MODS
- Newspaper digitization
- WorldShare Management Services
- Adobe courses
- Refining presentation skills

4. What kinds of CE/PD would you like to take in the next one to three years? (Note: Those responses shown without numbers received one response each.)

- Bringing together multiple technologies/how they can work together (for example, DAMS, ArchivesSpace, CollectionSpace) – 3
- Grant writing/fundraising – 2
- Digital asset management/digital content management courses – 2
- Financial literacy (creating and maintaining budgets)
- “Leading from Anywhere”
- Team building
- Communication
- SAA DAS courses
- Electronic records
- Leadership for cultural heritage institutions
- Organizing volunteers
- Role of archives (how it fits into the organization)
- Advocacy
Integrative records management courses (for records issues faced by all types of cultural heritage organizations)
• Working with diverse staff/users/faculty (especially non-traditional/under-represented groups)

As part of a “probe” to this question, the group was asked if they are taking these courses because they have to, or because they aspire to take courses on these topics. Four participants specifically said they were not required to take particular courses by their employers (two others did not specifically respond). The group discussed a number of “aspirational” courses, and provided the following items and comments:

• Development of educational resource materials for K-12 audiences
• Collections care courses
• Coding classes from CodeCamp
• Collaboration across agencies and organizations is important because it can help you “look at the broader picture, look outside of silos into other agencies and organizations.”
• Working together with other agencies that are “outside the norm” for cultural heritage organizations
• Leadership and management skills
• Grant writing and budgets
• Working with under-represented groups
• Website design
• Advanced Adobe

5. What skills do you hope to develop through CE/PD opportunities? What skills do you wish to gain to remain on top of the developments in your field?

• Continue to refine communication and listening skills
• Relationship building
• Dealing with ongoing technology changes as they arise
• Continual re-evaluation of what we are doing and whether it still works
• Being able to code well enough to utilize open source software for our organizations without the help of tech support
• Collaboration skills for working with partners from across the LAM landscape
• Skills in development of educational resource materials that use our institution’s collections
• Advocacy for archives based on communication and listening skills; how to advocate for oneself and for one’s collections based on various groups, including other allied professionals, funding groups, donors (especially prospective or non-traditional donors), faculty and/or deans if one is in an academic setting, politicians, and especially to the public. (NOTE: Advocacy was a topic that five of the participants mentioned as being important.)
• One additional advocacy example from a participant: In Connecticut, there are many tiny, volunteer-run historical societies. The volunteers have little knowledge of archives. The
Connecticut State Historical Records Advisory Board (SHRAB) has been working on training some of them. “Advocacy can also take the form of assisting smaller organizations.”

6. What factors lead you to select specific CE/PD opportunities? (Note: Those responses shown without numbers received one response each.)
   - Cost – 3
   - Location – 2
   - Timing of session – 2
   - Length of time/duration/time commitment to participate in session – 2
   - Delivery mode/format – 2
   - Interest/priorities of trainee (especially if course costs money) – 2
   - Sponsor
   - Individual performance goals
   - Departmental long-range plan

As a “probe” question, participants were asked if they as individuals, or their organization, pay for CE/PD training. Four participants said their organization pays, and two said both their organization and they individually pay for some offerings.

7. Have you or your organization worked on collaborative projects across cultural heritage sectors (with museums, libraries, historical societies)?
   - Four of the six participants said they have worked on cross-sector collaborative projects, while two others had not. Projects included:
     - Libraries, archives, and museums working together for preservation training for staff in Idaho
     - Shared digital collections and repository work between and archives and a state library, along with programming on digital preservation
     - Partnering with museums and historic sites on exhibits and educational programming
     - One archives-based participant, who was relatively new to her position, knows that her organization has worked a bit with the local museum, and although she has not, she is hoping to begin collaborating shortly for numerous projects, including potential grants with other institutions.
     - The organization is an archives/library/museum within one organization, so has internal collaboration.
     - Collaboration with Yale on a digital project
     - Every year, the participant’s library collaborates with local historical societies on lecture series
     - Collaborate on exhibits internally and with other institutions
The organization has developed an IMLS application where they hope to collaborate with another historical society in the area on finding aids for papers divided between several institutions.

One focus group participant said their primary mission was at their university, so they had limited external collaboration, but do provide primary resources and open space for faculty.

Students doing archival digitization on campus and did research in archives.

Worked with school district judges for national history day (two participants mentioned this).

An archives that works with religious organizations in organizing their records and archives.

Working with an African-American genealogical group.

An archives that collaborates with their university’s history department.

8. Do you see any advantages to taking CE/PD that reaches across cultural sectors and is led by organizations outside of your cultural heritage sector? What barriers do you see?

Advantages:

- Cross-pollination broadens perspectives for all and enhances collaborative opportunities. – 2
- Learn where the professions overlap and we can pool resources rather than reinventing the wheel – 2
- Working across cultural sectors breaks down barriers for users. A single search portal for all collections helps because researchers currently don’t know what catalog to use.
- There are a lot of departments/divisions at the university that the archives could work with, but are not organizations that archives typically work with, so collaboration could help to share ideas.
- Enhanced advocacy and raising awareness of cultural heritage profession among other stakeholders.
- Become familiar with each other’s terminology, which helps in communications and outreach efforts.

Barriers/Concerns:

- Some people exhibit unwillingness to approach the CE/PD with an open mind, and with the understanding that we are all special and unique and have similarities and commonalities.
- Time
- What would be financially feasible in other sectors may not be for an academic organization.
- Barriers may be put in place by our profession. If you are a certified archivist, you may not get the same number of re-certification points by going to a CE course offered by a different field. However, if an organization offering a course goes to the Academy of Certified Archivists first, ACA will pre-assign a number of points.
It is a challenge to have to address misunderstandings and reticence among allied professionals.

“Some archivists may feel they cannot learn from librarians – I hated this when I saw it in colleagues.”

The group talked about barriers and ways to “leap over barriers.”

It is a barrier to try to learn about other educational opportunities from allied professions.

9. Have you taken cross-sector training in the past three to five years?
   - Four participants said yes, and two said they had no opportunity.
   - Course topics included:
     - Environmental monitoring
     - Rare Book School
     - Attending conferences in other sectors
     - One participant had the opportunity to do this when she worked in the Park Service because all of the divisions offered opportunities for people to learn in each of a variety of fields.
     - Diversity-related trainings
     - Genealogical research
     - Oral history
     - Customer service
     - Accounting
     - Managing stress

10. If you were to take cross-sector training, what topics would you be interested in?
    - Mentoring
    - Coaching
    - Statistical and assessment courses (2)
    - Reaching the K-12 educational audience
    - Metadata
    - Data management planning
    - Collection access
    - Collaboration
    - Reference help for researchers interested in artifacts and documents; how to safely present artifacts in that scenario; how to handle artifacts
11. Would cross-sector training be beneficial to you professionally, to your organization, or both?
   - All six participants agreed it would be beneficial to both them and their organizations.
   - Some additional comments on this question included:
     o It would be helpful to my organization because it would create awareness of the archives and the potential for us to work for others. It would be helpful for me because there may be ideas from other areas that I have overlooked or been unaware of.
     o “I believe strongly that it would be beneficial to both my organization and to myself, but I am not a key decision maker; priorities are more about technology than supporting or managing people, and the environment is tough because of money/funding.”

12. What else would you like to add about CE/PD issues?
   - “Getting us out of our silos will benefit not only our organizations, but also society as a whole.”
   - Organizations offering continuing education/professional development courses need to make sure they are publicized across fields.
   - The efforts of the Coalition go a long way towards furthering the development of and access to CE/PD training across our various professions.
   - “Historical societies are great places to look for examples of working across fields; they are kind of a microcosm of collections within an organization.”
   - “I am not sure if it is possible, but is there a way to create a forum or course to discuss how archives/libraries/museums are viewed by the public – particularly by nontraditional groups (refuges, racial groups, etc.) with complicated histories – as we seek to collaborate and do outreach.” Two other participants strongly supported the idea of such a forum.

A final probe question in this area asked participants if professional reading was important to them as a method for CE/PD.

   - Four of the session participants said “yes,” one said “no,” and one did not answer.
   - The participant who said “no” said that they did professional reading in the beginning of their career, but has “found more inspiration in other fields and applied insights to their work instead.”
   - One participant does a lot of professional reading, but like CE/PD, it often comes up when a priority is raised. They use University Interlibrary Loan for books, and seek out journals for information on technology.
   - A participant said they were drawn more to blogs by archivists, and also by their personal experiences in the workplace.
   - One focus group participant said this was beyond the scope of their work and showed a “chasm or digital divide,” because they want to be able to read and keep up with technology and personnel issues, but often have to choose one or the other because of time and other obligations.
Virtual focus group session 2: February 25, 2016

- Session Introduction, Purpose of Focus Group Session, Process Agreement, Participant Introductions

1. Which of these groups do you most closely identify yourself or your organization with? (NOTE: This session had sixteen participants.)

- Libraries – 8
  - State library – 3
  - Public library – 4
  - Academic library – 1
  - Library school – 1

- Archives – 6
  - Academic archives – 4
  - Government archives – 1
  - Tribal archives – 1

- Historical society – 1

2. What organizations do you utilize for continuing education/professional development (CE/PD) opportunities? (Note: Those responses shown without numbers received one response each.)

- Society of American Archivists (SAA) – 6 (includes one specific mention of Preserving Digital Archives classes)
- Connecting to Collections webinars, etc. – 2
- Rare Book and Manuscript Section, ALA (RBMS) – 2
- Rare Book School – 3
- Public Library Association – 2
- American Library Association – 3
- Association for Library Collections & Technical Services (ALCTS) – 2
- LYRASIS – 3
- AMIGOS – 2
- iPRES – 2
- Association for the Study of African American Life & History
- Harvard MOOCs on rare books
- Conference of Inter-Mountain Archivists
- Utah Library Association
- Utah State Archives and Records Service
- Council of State Archivists
• Conservation Center for Art & Historic Artifacts (CCAHA)
• Mid-Atlantic Regional Archives Council
• Association of Specialized and Cooperative Library Agencies (ASCLA)
• Web Junction
• Indiana State Library
• Georgia Library Association
• Society of Georgia Archivists
• Georgia Library Education Access Network (GLEAN, the Georgia Public Library Continuing Education Portal)
• Ohio Digitization Interest Group (OhioDIG)
• Society of Ohio Archivists
• Ohio Library Council
• Digital Preservation Management Workshop (Cornell/M.I.T.)
• Midwest Archives Conference (MAC)
• Ohio Valley Group of Technical Services Librarians (OVGTSL)
• Louisiana Archives and Manuscript Association (LAMA)
• New York State Archives Documentary Heritage Program
• Pennsylvania Library Association
• Tampa Bay Library Consortium
• Lynda.com
• Ohio Local History Alliance (OLHA)
• DPLAFest
• Panhandle Library Access Network (PLAN)

3. What types of CE/PD course topics have you taken in the past year? (Note: Those responses shown without numbers received one response each.)

• Digital preservation/digital archives – 3
• Disaster planning – 3
• SAA Digital Archives Specialist courses – 2
• Digitization/digital collections – 2
• Managing African American collections
• Digital humanities (focus at RBMS)
• Knowledge Unlatches
• NEH grant webinars
• Metadata
• Creating digital signs
• Oral histories
• Marketing your library
• E-Rate training
• Leadership
• Virtual reference
• Dealing with bedbugs
• Accountability

4. What kinds of CE/PD would you like to take in the next one to three years? (Note: Those responses shown without numbers received one response each.)

• Digital preservation (3 initial positive responses; many more during further discussion of this question)
• Metadata – 2 (Boot Camp; Coding)
• Best practices for volunteers/creating and implementing volunteer-run projects – 2
• Web 2.0 Tools for archives – 2
• Grant writing – 2
• Leadership
• Contract writing
• Teaching public libraries to care for archival materials
• Courses on data management and sharing MOOC
• Collaborating with community archives
• Managing change
• Delivery of digital archives
• Teaching with primary resources
• Library administration
• How to choose a content management system
• Open Refine
• Tableau
• Creating an online presence
• Basic MARC for small libraries
• How to start archives
• Practical steps to teach non-archivists
• Handling unpleasant customers or problem patrons
• Social media for special collections
• Assessment
• Records management
• E-mail management
• Managing audiovisual collections
• Intellectual property issues
• Digital repository showcase (geared toward institutions with limited funds)
• Active shooter scenario
• Policies and procedures for managing reproduction requests including IP issues
• Original cataloging for small organizations
• Focused workshops on practical aspects of METS and MODS
• How small libraries can best use limited resources
• Drupal
• Server management
• Managing digital repositories
• Selection for digitization
• Choosing digitizing equipment
• Mini-grants
• Digitization practices
• Project Management Professional (PMP)

As part of a “probe” to this question, the group was asked if they are taking these courses because they have to or because they aspire to take courses on these topics. Four participants specifically said they were required to take particular courses by their employers, two said it was not required, and two said they were encouraged; eight others did not specifically respond.

5. What skills do you hope to develop through CE/PD opportunities? What skills do you wish to gain to remain on top of the developments in your field? (Note: Those responses shown without numbers received one response each.)

• Managing/administering digital collections – 3 (includes one specific mention of “ability to deal with digital records from accession to access”)
• Assessment – 3
• Effective processing/More Product Less Process (MPLP) for smaller institutions – 2
• Better teaching/course instruction skills – 2
• Change management/organizational change management – 2
• Digital preservation
• Managerial classes as a supervisor
• Technical skills
• More effective project management
• Management skills
• Conflict resolution
• Analyzing usage data and trends
• Assessment, analytics
• Managing volunteers/interns/practicum students
• Implementing new technologies
• Coding skills
- Metadata
- Business planning
- Advocacy skills
- Budget management
- Grant writing
- Social media usage
- Teaching non-archivists to care for collections
- Working with donors
- Working with politicians

6. What factors lead you to select specific CE/PD opportunities? (Note: Those responses shown without numbers received one response each.)

- Cost – 9
- Location/distance from my site – 5
- Relevance/interest/priorities of trainee – 5
- Timing of session – 4
- Recommendations from peers – 2
- Delivery mode/format – 2
- Prefer more focused CE/PD – 2
- Length of time/duration/time commitment to participate in session
- Topic
- Sponsor
- Individual performance goals
- Departmental needs
- Availability on campus
- On-campus conversations about coming trends or interests
- Ideas sparked by past conference sessions
- Skills I didn’t receive in MLIS
- Public library license renewal
- Certification

As a “probe” question, participants were asked if they as individuals, or their organization, pay for CE/PD training. Six said their organization pays; four said both their organization and they individually pay for some offerings. Two additional comments were that “the State Library subsidizes some of CE/PD in the state,” and “there is almost no funding for CE/PD of any kind (at the focus group participant’s institution).”
7. Have you or your organization worked on collaborative projects across cultural heritage sectors (with museums, libraries, historical societies)?

- Thirteen of the 15 focus group participants answering this question said they have worked on cross-sector collaborative projects; two others had not. Projects discussed in relation to this question included:
  - Many working with local historical societies – 3
  - Those in state agencies working with other agencies within state government – 2
  - Area/regional digitization projects within their states, or statewide digitization projects – 2

8. Do you see any advantages to taking CE/PD that reaches across cultural sectors and is led by non-archival organizations? What barriers do you see?

- All fifteen of the focus group participants saw this type of collaboration as an advantage. Specific advantages mentioned included:
  - “Solutions others have developed may enhance innovation in our sector.”
  - “We can learn from outreach techniques, exhibition and programming methods.”
  - “LAMs are converging in terms of their basic responsibilities and activities.”
  - “Yes I think it is essential. It is an advantage for me because we are just developing this program at our organization and there are aspects that are relevant to archives, records management, museums, and the information profession more generally.”
  - “We love this at OhioDIG – our members come from across archives, libraries, museums, historical societies, and bring much.”
  - “Even though [a training session] may not say it is for archivists does not mean that you will not be able to use it.”

- Barriers/concerns/challenges:
  - Terminology/jargon is often used differently between libraries, archives, museums – 4
  - “Not-thought-of here bias” – 2
  - Inability to appreciate different contexts in which different types of organizations work – 2
  - Priorities of different organization types
  - There are even problems in the applicability of some CE/PD between public library and academic library audiences.
  - Resources allocations are often different.
  - Levels of technology
  - Access to resources
9. Have you taken cross-sector training in the past one to three years?

- Eleven participants said “yes,” and two said no opportunity yet.
- Course topics included:
  - Cooperation between libraries, archives, and museums
  - Archivists who attended museum conference and training – 2
  - Archivist who attended library training – 2
  - Archivist who attended workshops for historical and genealogical societies
  - Digitization/preservation workshops
  - “Have taken an amazing leadership class with a business leader.”

10. If you were to take cross-sector training, what topics would you be interested in?

- “One thing I am interested in is pursuing courses in a field such as IT – particularly programming/coding, database management, but it is difficult because there is often a level of pre-learning/knowledge or experience required or the training doesn’t explain well how these skills can be practically applied to an archival setting.” In total, four people expressed strong interest in coding/systems training.
- Museum collection management – 2
- Public speaking/“How to entertain a crowd. At a library, we’re used to one-on-one interactions; leading a tour would be a different experience.” – 2
- Access to digital content
- Outreach for LAMS
- (Identifying) potential cross-sector projects
- Social media/marketing
- Digital preservation management
- 3-D digital photography of items
- How to display 3-D objects on your website
- Museum-style display
- LAM collaboration with public education
- Museums and archives collaboration
- Records management for small organizations
- Curation
- Advocacy
- Grant writing
- Implementing asset management systems
- “Rather than librarians taking courses for museums or archives and vice versa, it seems like it would be really useful to have courses like Museum skills for librarians”

11. Would cross-sector training be beneficial to you professionally, to your organization, or both?
• Thirteen participants agreed it would be beneficial to both them and their organizations; two said it would be especially beneficial to them personally.

• Some additional comments on this question:
  o “Technical skills would be particularly beneficial and valuable because we only have one IT staff member who doesn’t have many of the necessary skills for database, server, digital preservation and digital repository management work that we need.”
  o “All cross-sector training that I have ever had has offered something that was helpful to me specifically. I think it then was able to help the organization with the broad spectrum of learning. From that, I think that more cross-sector training would be a great idea for all professionals.”

12. What else would you like to add about CE/PD issues? (Note: There was longer discussion on this question than at any of the other focus group sessions so far). Comments included:

• “CE/PD should focus on nuts and bolts issues and ideas that can be implemented locally.” (Four participants agreed on this.)

• “I’d love to see these kind of conversations [on cross-sector training and collaboration] happen at each of our different professional organizations [SAA, ALA, etc.]”

• “I think this [kind of discussion] helps to inform those in the position to create continuing education courses to offer sessions that are needed by the membership.”

• “Whatever ways [we] can constrain costs – my institution will support me but many small organizations cannot.”

• “This might be too much to hope for, but workshops that come with follow-up support. Come with a project, spend workshop time getting set up, and then have follow-up check in and support.”

• Topics that are geared toward more experienced professionals

• Centralized locations for workshops and conferences to keep down travel cost; more travel grants

• “Ways to encourage organizations to be more supportive of CE/PD – especially smaller organizations.”

• “Need to look at hybrid approaches to delivering content – in person and virtual. Offer topics in multiple formats complete with archived webinars with a way to contact the presenter afterward with follow up questions.”

• “So many good ideas lose momentum afterwards, whereas continued communication with the same people would be great.”

• “One of this group’s [the Coalition’s] webinars last year had an assignment and it prompted some really good work with my colleagues.”

• Two participants cited managing college politics was cited as a training need.

• Federal records management training is needed.

• Copyright training is needed.
An additional probe question in this area asked participants if professional reading was important to them as a method for CE/PD.

- Eight of the session participants said “yes,” two said “no,” and five did not specifically answer. Comments included:
  - “Yes, but not anywhere near as much as I should!”
  - “We have a departmental reading group to encourage staff to read professionally.
  - “It is critical to do professional reading, but it is becoming harder and harder to find the time to do it.”
  - “All the agency directors have a book discussion; generally, on a leadership topic.”
  - “[Professional reading] is something that is really useful, but isn’t really credited as part of CE requirements. Seems like there should be a way to make that count.”
  - “I see some informal groups online/twitter doing it.”
  - “Our Library just started a Table of Contents service, and that is making it easier to see what is out there, of interest.”
  - “Not many libraries can afford all of the professional journals, so that side of things also makes it hard.”

A final probe question re-focused the group on specific technical training they needed. Answers included:

- Learning outsourcing for audiovisual preservation, access, and reformatting – 2
- Maker spaces – 2
- Hacking
- Podcasting
- Website development
- “Several open access online journals have emerged over the last 10 years with great content (in this area)”
- Digital humanities work/program
Survey Data Visualizations

Authors: Nathan Brown, Jessica Aurelia Carr, TrueBearing Consulting
Co-Editors: Amanda Focke, Eric Pourchot, Laurie Sather
Initial Release 30 April, 2016

Tableau Public data visualizations
Available for dynamic reporting at:
https://public.tableau.com/views/MtLdashboardset/MappingtheLandscapes

Interpretive notes
Two different sector filters are used in this data visualization storyboard, depending on the focus of a given story point:

Storypoints 1-2, 5-6

Sectors including hybrid professionals. These storypoints offer information about perceptions and experiences in CE/PD in which sector-identification is a key concern (regardless of hybrid associations). In addition to self-identified sector professionals, respondents that identified as "hybrid" and specified one or more sectors (archives, historical societies, libraries, or museums) are included within the sector(s) they specified. When this methodology is used, the sector filter is labeled as “Sector identification.”

Storypoints 3 and 4

Original identified sectors. Since these storypoints offer broadly descriptive information about respondents and their settings, they are categorized according to their self-identified sector (archives, historical societies, libraries, or museums) or as "hybrid/other." When this methodology is used, the sector is labeled as “Select Sector.”


### Self-Identified Library, Archives, and Museum Professional Development Needs

#### Survey item to data analysis field coding glossary

<table>
<thead>
<tr>
<th>Survey Item</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>57. Research. Given the requirements of my work role, I believe:</td>
<td>Methodologies for research</td>
</tr>
<tr>
<td>I have the knowledge and skills to do this successfully</td>
<td>Technological platforms for research</td>
</tr>
<tr>
<td>My knowledge and/or skills need minor improvement to do this successfully</td>
<td></td>
</tr>
<tr>
<td>My knowledge and/or skills need significant improvement to do this successfully</td>
<td></td>
</tr>
<tr>
<td>This is not relevant to my work role</td>
<td></td>
</tr>
<tr>
<td>Use appropriate research methodologies in order to conduct effective research</td>
<td></td>
</tr>
<tr>
<td>Use appropriate technological platforms to conduct effective research</td>
<td></td>
</tr>
<tr>
<td>58. Project management. Given the requirements of my work role, I believe:</td>
<td>Project management principles</td>
</tr>
<tr>
<td>I have the knowledge and skills to do this successfully</td>
<td>Lead work teams</td>
</tr>
<tr>
<td>My knowledge and/or skills need minor improvement to do this successfully</td>
<td>Monitor/ adapt project progress</td>
</tr>
<tr>
<td>My knowledge and/or skills need significant improvement to do this successfully</td>
<td></td>
</tr>
<tr>
<td>This is not relevant to my work role</td>
<td></td>
</tr>
<tr>
<td>Employ sound project management principles and procedures in the planning and implementation of programs and services</td>
<td></td>
</tr>
<tr>
<td>Lead work teams with clear direction and effective communication</td>
<td></td>
</tr>
<tr>
<td>Monitor project progress, evaluate outcomes, and adapt as needed</td>
<td></td>
</tr>
<tr>
<td>59. Awareness of professional context. Given the requirements of my work role, I believe:</td>
<td>Theoretical/ historical professional underpinnings</td>
</tr>
<tr>
<td>I have the knowledge and skills to do this successfully</td>
<td>Basic professional models of practice</td>
</tr>
<tr>
<td>My knowledge and/or skills need minor improvement to do this successfully</td>
<td>Relationships with allied professions</td>
</tr>
<tr>
<td>My knowledge and/or skills need significant improvement to do this successfully</td>
<td>Record-keeping</td>
</tr>
<tr>
<td>This is not relevant to my work role</td>
<td>Professional standards and best practices</td>
</tr>
<tr>
<td>Draw upon an awareness of the theoretical and historical underpinnings of my profession</td>
<td></td>
</tr>
<tr>
<td>Draw upon basic professional models of practice in my profession/sector</td>
<td></td>
</tr>
<tr>
<td>Participate in relationships with allied professions</td>
<td></td>
</tr>
<tr>
<td>Utilize record-keeping models</td>
<td></td>
</tr>
<tr>
<td>Draw upon professional standards and best practices</td>
<td></td>
</tr>
<tr>
<td>60. Professional ethics. Given the requirements of my work role, I believe:</td>
<td>Draw on basic values and ethics of sector</td>
</tr>
<tr>
<td>I have the knowledge and skills to do this successfully</td>
<td>Laws, regulations, inst'l policies, ethical standards</td>
</tr>
<tr>
<td>My knowledge and/or skills need minor improvement to do this successfully</td>
<td>Culture of ethics/ accountability</td>
</tr>
<tr>
<td>My knowledge and/or skills need significant improvement to do this successfully</td>
<td></td>
</tr>
<tr>
<td>This is not relevant to my work role</td>
<td></td>
</tr>
<tr>
<td>Draw upon the basic values and ethics of my sector (e.g., archive, library, historical society, museum)</td>
<td></td>
</tr>
<tr>
<td>Draw upon an awareness of the laws, regulations, institutional policies, and ethical standards that are applicable to my sector (e.g., archive, library, historical society, museum)</td>
<td></td>
</tr>
<tr>
<td>Promote a culture of ethics and accountability</td>
<td></td>
</tr>
</tbody>
</table>
Survey Item

61. Communication. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Variety of communication methods</th>
<th>Communicate effectively with diverse audiences</th>
<th>Situation-specific communication</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have the knowledge and skills to do this successfully</td>
<td></td>
<td></td>
</tr>
<tr>
<td>My knowledge and/or skills need minor improvement to do this successfully</td>
<td></td>
<td></td>
</tr>
<tr>
<td>My knowledge and/or skills need significant improvement to do this successfully</td>
<td></td>
<td></td>
</tr>
<tr>
<td>This is not relevant to my work role</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Communicate effectively using a variety of methods (face-to-face, digital, written)
Select and apply the most appropriate and effective communication means to meet situational needs (including obtaining consensus, persuasion, instructing, motivating, and applying techniques of active listening and asking open-ended questions)

62. Collaboration. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Develop relationships to achieve common goals</th>
<th>Work effectively in teams</th>
<th>Manage org, politics, conflict, difficult coworkers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have the knowledge and skills to do this successfully</td>
<td></td>
<td></td>
</tr>
<tr>
<td>My knowledge and/or skills need minor improvement to do this successfully</td>
<td></td>
<td></td>
</tr>
<tr>
<td>My knowledge and/or skills need significant improvement to do this successfully</td>
<td></td>
<td></td>
</tr>
<tr>
<td>This is not relevant to my work role</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Develop and maintain effective relationships with others to achieve common goals
Work effectively in teams, using strong team-building skills and attitudes
Apply effective strategies to manage organizational politics, conflict and difficult coworkers

23. Collection development. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Build collections</th>
<th>Maintain collections</th>
<th>Establish/apply criteria</th>
<th>Policies and procedures</th>
<th>Ensure collections quality</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have the knowledge and skills to do this successfully</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My knowledge and/or skills need minor improvement to do this successfully</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My knowledge and/or skills need significant improvement to do this successfully</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>This is not relevant to my work role</td>
<td></td>
<td></td>
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</tbody>
</table>

Build collections
Maintain collections
Establish/apply criteria
Policies and procedures
Ensure collections quality
### Survey Item

24. Physical collection management. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Survey Item</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Physical resources</strong></td>
<td>Organize, maintain, and evaluate the institution's physical resources</td>
</tr>
<tr>
<td><strong>Control/access to physical collections</strong></td>
<td>Develop tools and systems that provide optimal control of and access to physical collections</td>
</tr>
<tr>
<td><strong>Organize collections</strong></td>
<td>Effectively organize individual collections (both intellectually and physically) in all media and formats</td>
</tr>
<tr>
<td><strong>Sustain collections over time</strong></td>
<td>Sustain and improve physical collections over time</td>
</tr>
</tbody>
</table>

25. Physical preservation principles and technical skills. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Survey Item</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Preservation activities</strong></td>
<td>Establish and implement appropriate actions for the preservation of my institution's materials (e.g., activities to minimize deterioration such as environmental conditions, storage, and handling)</td>
</tr>
<tr>
<td><strong>Conservation activities</strong></td>
<td>Establish and implement appropriate actions for the conservation of my institution's materials (e.g., treatment, cleaning, mending/repair)</td>
</tr>
<tr>
<td><strong>Physical protection, authentication activities</strong></td>
<td>Integrate and implement administration activities to ensure the physical protection and authentication of collection materials and to ensure their continued accessibility to researchers</td>
</tr>
</tbody>
</table>
### Digital Collection Management

26. Digital collection management: Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Survey Item</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organize, maintain, and evaluate the institution's digital resources</td>
<td>Digital resources</td>
</tr>
<tr>
<td>Effectively organize individual digital collections, both intellectually</td>
<td>Organize digital collections</td>
</tr>
<tr>
<td>and physically</td>
<td></td>
</tr>
<tr>
<td>Develop tools and systems that provide optimal control of and access to</td>
<td>Control access to digital collections</td>
</tr>
<tr>
<td>digital collections</td>
<td></td>
</tr>
<tr>
<td>Install, test, and understand digital curation software</td>
<td>Digital curation software</td>
</tr>
<tr>
<td>Integrate different tools into workflows, selecting and implementing</td>
<td>Integrate tools into workflows</td>
</tr>
<tr>
<td>appropriate curation tools to manage digital resources</td>
<td></td>
</tr>
<tr>
<td>Sustain and improve digital collections over time</td>
<td>Sustain digital collections over time</td>
</tr>
</tbody>
</table>

### Institutional Management Competencies

31. Facility design and management: Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Survey Item</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create and maintain a physical environment that encourages all patrons to</td>
<td>Encourage patron use</td>
</tr>
<tr>
<td>use our institution's resources, promoting community engagement and</td>
<td></td>
</tr>
<tr>
<td>collaboration</td>
<td></td>
</tr>
<tr>
<td>Create and maintain a physical environment that complies with all health</td>
<td>Safe environment</td>
</tr>
<tr>
<td>and safety laws and regulations, and addresses environmental</td>
<td></td>
</tr>
<tr>
<td>responsibilities and emergency preparedness</td>
<td></td>
</tr>
<tr>
<td>Create and maintain a physical environment that performs smoothly, with the</td>
<td>Well-run environment</td>
</tr>
<tr>
<td>facility supplies and resources needed to support the activities of our</td>
<td></td>
</tr>
<tr>
<td>institution</td>
<td></td>
</tr>
</tbody>
</table>
32. Organizational planning, policies, and procedures. Given the requirements of my work role, I believe:

Understand, apply and explain applicable laws
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Develop policies and procedures based on the institution’s mission and user needs to guide efficient and effective institutional operations
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Engage in deliberate and collaborative strategic planning, including appropriate goals, objectives and activities that reflect analysis of community needs
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

33. Supervision and Human Resources. Given the requirements of my work role, I believe:

Contribute to a productive workforce through effective recruitment and selection
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Lead and empower employees to deliver effective, high-quality service
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Establish effective strategies for performance management
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Understand and apply legal standards and requirements for performance management
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Work effectively with consultants and volunteers
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Plan for and support staff career development opportunities
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

34. Institutional affiliation. Given the requirements of my work role, I believe:

Ensure my institution’s credibility with respect to accreditation standards
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Ensure my institution’s credibility with respect to ongoing information and feedback from advisory bodies
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

35. Financial management. Given the requirements of my work role, I believe:

Understand and employ basic budget and finance concepts and terminology
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Establish effective financial management processes and services, using sound business and financial judgment
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Identify and pursue multiple funding sources for my institution
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

36. Support and develop library, archives, and museum professionals. Given the requirements of my work role, I believe:

Understand laws
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Policies and procedures
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Strategic planning
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Recruitment and selection of workforce
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Lead and empower employees
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Performance management strategies
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Performance management standards, requirements
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Work with consultants, volunteers
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Support staff career development
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Institutional credibility
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Information, feedback from advisory bodies
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Basic budget/finance understanding
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Financial processes
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role

Identify, pursue multiple funding sources
- [ ] I have the knowledge and skills to do this successfully
- [ ] My knowledge and skills need minor improvement to do this successfully
- [ ] My knowledge and skills need significant improvement to do this successfully
- [ ] This is not relevant to my work role
39. Core technology: Given the requirements of my work role, I believe:

- Basic computer functions and tasks
- Basic functions of email and web-based resources
- Apply technologies for learning/collaboration

40. Intermediate/advanced technology: Given the requirements of my work role, I believe:

- Automation systems
- Enterprise computing systems
- Network and security systems
- Server administration systems
- Technology planning
- Web design/development
### Leadership Competencies

#### Survey Item

44. Flexible and reflective thinking. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Innovative thinking about mission and goals</td>
</tr>
<tr>
<td>Assess organizational shortcomings/ assets</td>
</tr>
<tr>
<td>Continuous improvement</td>
</tr>
<tr>
<td>Consider impact in community and beyond</td>
</tr>
<tr>
<td>Impactful ideas, environments, technologies</td>
</tr>
<tr>
<td>Anticipate problems/ opportunities</td>
</tr>
</tbody>
</table>

#### Field Name

<table>
<thead>
<tr>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Think innovatively about the mission and goals of the organization</td>
</tr>
<tr>
<td>Accurately assess shortcomings and assets of the organization</td>
</tr>
<tr>
<td>Recognize and implement opportunities for continuous improvement</td>
</tr>
<tr>
<td>Think beyond the institution and current issues therein and consider the impact of the institution in the greater community and beyond</td>
</tr>
<tr>
<td>Consider ideas, environments, and technologies that impact communities and the institution on a broader scale</td>
</tr>
<tr>
<td>Show foresight by anticipating problems as well as opportunities</td>
</tr>
</tbody>
</table>

#### Survey Item

45. Planning and making effective decisions. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short-term/ long-term planning</td>
</tr>
<tr>
<td>Identify clear outcomes</td>
</tr>
<tr>
<td>Evidence based decision making</td>
</tr>
<tr>
<td>Responsibility for decisions</td>
</tr>
<tr>
<td>Decisional transparency</td>
</tr>
</tbody>
</table>

#### Field Name

<table>
<thead>
<tr>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effectively plan for both the short-term and long-term</td>
</tr>
<tr>
<td>Identify clear, well-defined outcomes</td>
</tr>
<tr>
<td>Use data systematically in making decisions and evaluating outcomes</td>
</tr>
<tr>
<td>Assume responsibility for making critical decisions</td>
</tr>
<tr>
<td>Show transparency in decision making</td>
</tr>
</tbody>
</table>

46. Leading through change. Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal/ external support for change</td>
</tr>
<tr>
<td>Collaborate during change</td>
</tr>
<tr>
<td>Build community relationships</td>
</tr>
<tr>
<td>Environment that encourages problem solving</td>
</tr>
</tbody>
</table>

#### Field Name

<table>
<thead>
<tr>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Build internal and external support for change</td>
</tr>
<tr>
<td>Effectively work with others to keep any transitions or changes running smoothly</td>
</tr>
<tr>
<td>Build relationships with community groups and constituents</td>
</tr>
<tr>
<td>Foster an environment that encourages others to create solutions for their own problem</td>
</tr>
</tbody>
</table>
### Survey Item

#### 47. Engaging, motivating, and inspiring: Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Survey Item</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motivate individuals to actively contribute to the organization</td>
<td>Motivate individuals to contribute</td>
</tr>
<tr>
<td>Create an environment of trust and integrity</td>
<td>Environment of trust and integrity</td>
</tr>
<tr>
<td>Inspire others to think creatively about what might be, rather than just</td>
<td>Inspire others to think creatively</td>
</tr>
<tr>
<td>what is</td>
<td>about what might be, rather than just</td>
</tr>
<tr>
<td>Encourage an environment of active communication</td>
<td>Encourage an environment of active</td>
</tr>
<tr>
<td>Give and receive constructive feedback</td>
<td>communication</td>
</tr>
</tbody>
</table>

#### 48. Cultural competency: Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Survey Item</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exhibit an awareness of and appreciation for diverse cultures and beliefs</td>
<td>Awareness of diverse cultures and</td>
</tr>
<tr>
<td>Foster an environment where all cultures are respected and valued</td>
<td>beliefs</td>
</tr>
</tbody>
</table>

#### 52. Patron services and access: Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Survey Item</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand and respond to patron research needs and questions</td>
<td>Respond to patron research needs</td>
</tr>
<tr>
<td>Use online tools and communities to engage with and provide services to</td>
<td>Use online tools/ communities for</td>
</tr>
<tr>
<td>users</td>
<td>user engagement</td>
</tr>
<tr>
<td>Define and implement outreach services for my institution’s community</td>
<td>Outreach services</td>
</tr>
<tr>
<td>to increase use of institutional services and to reach underserved</td>
<td></td>
</tr>
<tr>
<td>populations</td>
<td></td>
</tr>
<tr>
<td>Design, implement and sponsor programs or initiatives that provide</td>
<td>Opportunities for information,</td>
</tr>
<tr>
<td>opportunities for information, education, entertainment, and/or lifelong</td>
<td>education, entertainment, lifelong</td>
</tr>
<tr>
<td>learning</td>
<td>learning</td>
</tr>
<tr>
<td>Design and implement my institution’s services to meet the needs and</td>
<td>Needs, interests of patrons</td>
</tr>
<tr>
<td>interests of the community and patrons across their lifespan (e.g., young</td>
<td>across lifespan</td>
</tr>
<tr>
<td>adults, seniors)</td>
<td></td>
</tr>
</tbody>
</table>
Survey Item: Education and Training
Given the requirements of my work role, I believe:

<table>
<thead>
<tr>
<th>Educational/ training/ interpretation programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public access technology</td>
</tr>
<tr>
<td>Publications/ other information</td>
</tr>
<tr>
<td>Patron training</td>
</tr>
</tbody>
</table>

Survey Item: Community Relations and Outreach
Given the requirements of my work role, I believe:

| Demonstrate the impact and value of my institution to the community through ongoing evaluation and assessment of services |
| Build support for my institution among a variety of groups, using the most appropriate methods |
| Maintain positive public relations through communication, marketing and/or promotion of my institution's values, services, accomplishments and needs to all stakeholders |
| Build relationships with community organizations |

Field Name: Educational/ training/ interpretation programs

Field Name: Public access technology

Field Name: Publications/ other information

Field Name: Patron training

Field Name: Demonstrate value of institution through evaluation

Field Name: Build support for institution

Field Name: Communication, marketing, promotion of institution

Field Name: Relationships with community orgs
### Heatmap 1: Collections competencies — Archives

<table>
<thead>
<tr>
<th>Collections</th>
<th>Have knowledge/skills for success</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Not relevant to role</th>
<th>% in need (minor + significant)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ARCHIVES</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>COLLECTIONS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Collection Development</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Build collections</td>
<td>36%</td>
<td>42%</td>
<td>10%</td>
<td>12%</td>
<td>52%</td>
</tr>
<tr>
<td>Maintain collections</td>
<td>36%</td>
<td>48%</td>
<td>10%</td>
<td>6%</td>
<td>58%</td>
</tr>
<tr>
<td>Establish/ apply criteria</td>
<td>44%</td>
<td>38%</td>
<td>8%</td>
<td>9%</td>
<td>46%</td>
</tr>
<tr>
<td>Policies and procedures</td>
<td>58%</td>
<td>29%</td>
<td>5%</td>
<td>8%</td>
<td>34%</td>
</tr>
<tr>
<td>Ensure collections quality</td>
<td>63%</td>
<td>29%</td>
<td>3%</td>
<td>5%</td>
<td>32%</td>
</tr>
<tr>
<td>Disaster management plan</td>
<td>35%</td>
<td>40%</td>
<td>17%</td>
<td>8%</td>
<td>57%</td>
</tr>
<tr>
<td><strong>Physical Collection Management</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Physical resources</td>
<td>66%</td>
<td>24%</td>
<td>3%</td>
<td>7%</td>
<td>27%</td>
</tr>
<tr>
<td>Control/access to physical collections</td>
<td>35%</td>
<td>48%</td>
<td>11%</td>
<td>6%</td>
<td>59%</td>
</tr>
<tr>
<td>Organize collections</td>
<td>47%</td>
<td>39%</td>
<td>10%</td>
<td>4%</td>
<td>49%</td>
</tr>
<tr>
<td>Sustain collections over time</td>
<td>50%</td>
<td>39%</td>
<td>4%</td>
<td>7%</td>
<td>43%</td>
</tr>
<tr>
<td><strong>Physical Preservation Principles and Skills</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Preservation activities</td>
<td>49%</td>
<td>37%</td>
<td>8%</td>
<td>6%</td>
<td>45%</td>
</tr>
<tr>
<td>Conservation activities</td>
<td>17%</td>
<td>36%</td>
<td>31%</td>
<td>16%</td>
<td>67%</td>
</tr>
<tr>
<td>Physical protection and authentication activities</td>
<td>43%</td>
<td>39%</td>
<td>9%</td>
<td>9%</td>
<td>48%</td>
</tr>
<tr>
<td><strong>Digital Collection Management</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital resources</td>
<td>14%</td>
<td>40%</td>
<td>36%</td>
<td>10%</td>
<td>76%</td>
</tr>
<tr>
<td>Organize digital collections</td>
<td>18%</td>
<td>38%</td>
<td>34%</td>
<td>10%</td>
<td>72%</td>
</tr>
<tr>
<td>Control/access to digital collections</td>
<td>8%</td>
<td>30%</td>
<td>48%</td>
<td>14%</td>
<td>78%</td>
</tr>
<tr>
<td>Digital curation software</td>
<td>6%</td>
<td>27%</td>
<td>50%</td>
<td>17%</td>
<td>77%</td>
</tr>
<tr>
<td>Integrate tools into workflows</td>
<td>8%</td>
<td>26%</td>
<td>51%</td>
<td>15%</td>
<td>77%</td>
</tr>
<tr>
<td>Sustain digital collections over time</td>
<td>9%</td>
<td>37%</td>
<td>42%</td>
<td>12%</td>
<td>79%</td>
</tr>
<tr>
<td><strong>Digital Preservation Principles and Skills</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Preservation/ conservation of digital materials</td>
<td>10%</td>
<td>33%</td>
<td>44%</td>
<td>13%</td>
<td>77%</td>
</tr>
<tr>
<td>Ensure digital protection, authentication of collections</td>
<td>10%</td>
<td>32%</td>
<td>44%</td>
<td>14%</td>
<td>76%</td>
</tr>
<tr>
<td>Policies and procedures for digitization</td>
<td>20%</td>
<td>35%</td>
<td>31%</td>
<td>14%</td>
<td>66%</td>
</tr>
<tr>
<td>Policies and procedures for born digital materials</td>
<td>12%</td>
<td>34%</td>
<td>40%</td>
<td>14%</td>
<td>74%</td>
</tr>
</tbody>
</table>
### Heatmap 2: Institutional management competencies — Archives

<table>
<thead>
<tr>
<th>INSTITUTIONAL MANAGEMENT</th>
<th>Have knowledge/ skills for success</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Not relevant to role</th>
<th>% in need (minor + significant)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ARCHIVES</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facility design and management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Encourage patron use</td>
<td>39%</td>
<td>40%</td>
<td>8%</td>
<td>13%</td>
<td>48%</td>
</tr>
<tr>
<td>Safe environment</td>
<td>34%</td>
<td>43%</td>
<td>10%</td>
<td>13%</td>
<td>53%</td>
</tr>
<tr>
<td>Well-run environment</td>
<td>34%</td>
<td>43%</td>
<td>9%</td>
<td>14%</td>
<td>52%</td>
</tr>
<tr>
<td>Organizational Planning, Policies, and Procedures</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Understand laws</td>
<td>34%</td>
<td>52%</td>
<td>12%</td>
<td>2%</td>
<td>64%</td>
</tr>
<tr>
<td>Policies/ procedures</td>
<td>58%</td>
<td>34%</td>
<td>6%</td>
<td>2%</td>
<td>40%</td>
</tr>
<tr>
<td>Strategic planning</td>
<td>41%</td>
<td>45%</td>
<td>4%</td>
<td>10%</td>
<td>49%</td>
</tr>
<tr>
<td>Supervision and Human Resources</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruitment and selection of workforce</td>
<td>45%</td>
<td>35%</td>
<td>6%</td>
<td>14%</td>
<td>41%</td>
</tr>
<tr>
<td>Lead and empower employees</td>
<td>42%</td>
<td>42%</td>
<td>10%</td>
<td>6%</td>
<td>52%</td>
</tr>
<tr>
<td>Performance management strategies</td>
<td>35%</td>
<td>45%</td>
<td>12%</td>
<td>8%</td>
<td>57%</td>
</tr>
<tr>
<td>Performance management standards, requirements</td>
<td>40%</td>
<td>42%</td>
<td>10%</td>
<td>8%</td>
<td>52%</td>
</tr>
<tr>
<td>Work with consultants and volunteers</td>
<td>54%</td>
<td>32%</td>
<td>8%</td>
<td>6%</td>
<td>40%</td>
</tr>
<tr>
<td>Support staff career development</td>
<td>45%</td>
<td>35%</td>
<td>7%</td>
<td>13%</td>
<td>42%</td>
</tr>
<tr>
<td>Institutional Affiliations and Financial Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Institutional credibility</td>
<td>35%</td>
<td>24%</td>
<td>30%</td>
<td>11%</td>
<td>54%</td>
</tr>
<tr>
<td>Information, feedback from advisory bodies</td>
<td>26%</td>
<td>35%</td>
<td>10%</td>
<td>29%</td>
<td>45%</td>
</tr>
<tr>
<td>Basic budget/ finance understanding</td>
<td>42%</td>
<td>36%</td>
<td>10%</td>
<td>12%</td>
<td>46%</td>
</tr>
<tr>
<td>Financial processes</td>
<td>37%</td>
<td>33%</td>
<td>14%</td>
<td>16%</td>
<td>47%</td>
</tr>
<tr>
<td>Identify, pursue multiple funding sources</td>
<td>25%</td>
<td>34%</td>
<td>16%</td>
<td>26%</td>
<td>50%</td>
</tr>
</tbody>
</table>
### Heatmap 3: Technology competencies — Archives

<table>
<thead>
<tr>
<th>TECHNOLOGY</th>
<th>Have knowledge/skills for success</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Not relevant to role</th>
<th>% in need (minor + significant)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Core technology</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Basic computer functions and tasks</td>
<td>66%</td>
<td>25%</td>
<td>7%</td>
<td>2%</td>
<td>32%</td>
</tr>
<tr>
<td>Basic functions of email and web-based resources</td>
<td>67%</td>
<td>26%</td>
<td>6%</td>
<td>1%</td>
<td>32%</td>
</tr>
<tr>
<td>Apply technologies for learning/collaboration</td>
<td>58%</td>
<td>29%</td>
<td>12%</td>
<td>1%</td>
<td>41%</td>
</tr>
<tr>
<td><strong>Intermediate/Advanced Technology</strong></td>
<td></td>
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<tr>
<td>Automation systems</td>
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<tr>
<td>Enterprise computing systems</td>
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<td>30%</td>
<td>32%</td>
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</tr>
<tr>
<td>Network and security systems</td>
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<td>21%</td>
<td>33%</td>
<td>39%</td>
<td>54%</td>
</tr>
<tr>
<td>Server administration systems</td>
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<td>42%</td>
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</tr>
<tr>
<td>Technology planning</td>
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<td>66%</td>
</tr>
<tr>
<td>Web design/development</td>
<td>14%</td>
<td>30%</td>
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Heatmap 4: Leadership competencies — Archives

<table>
<thead>
<tr>
<th>ARCHIVES</th>
<th>Have knowledge/skills for success</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Not relevant to role</th>
<th>% in need (minor + significant)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Flexible and Reflective Thinking</strong></td>
<td></td>
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</tr>
<tr>
<td>Innovative thinking about mission and goals</td>
<td></td>
<td>55%</td>
<td>39%</td>
<td>5%</td>
<td>1%</td>
</tr>
<tr>
<td>Assess organizational shortcomings/assets</td>
<td></td>
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<td>33%</td>
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<td>26%</td>
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<tr>
<td>Continuous improvement</td>
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<td>8%</td>
<td>1%</td>
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<tr>
<td>Consider impact in community and beyond</td>
<td></td>
<td>45%</td>
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<td>4%</td>
</tr>
<tr>
<td>Impactful ideas, environments, technologies</td>
<td></td>
<td>36%</td>
<td>49%</td>
<td>13%</td>
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</tr>
<tr>
<td>Anticipate problems/opportunities</td>
<td></td>
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<td>50%</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Planning and Making Effective Decisions</strong></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Short-term/long-term planning</td>
<td></td>
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<td>49%</td>
<td>8%</td>
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<tr>
<td>Identify clear outcomes</td>
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<td>Evidence based decision making</td>
<td></td>
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<td>18%</td>
<td>1%</td>
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<tr>
<td>Responsibility for decisions</td>
<td></td>
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<td>4%</td>
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<tr>
<td>Decisional transparency</td>
<td></td>
<td>61%</td>
<td>31%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Leading through Change</strong></td>
<td></td>
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<tr>
<td>Internal/external support for change</td>
<td></td>
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<td>16%</td>
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<tr>
<td>Collaborate during change</td>
<td></td>
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</tr>
<tr>
<td>Build community relationships</td>
<td></td>
<td>42%</td>
<td>44%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Environment that encourages problem solving</td>
<td></td>
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<td>42%</td>
<td>13%</td>
<td>4%</td>
</tr>
<tr>
<td><strong>Engaging, motivating, and inspiring</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Motivate individuals to contribute</td>
<td></td>
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<td>44%</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Environment of trust and integrity</td>
<td></td>
<td>67%</td>
<td>28%</td>
<td>4%</td>
<td>1%</td>
</tr>
<tr>
<td>Inspire others to think creatively</td>
<td></td>
<td>48%</td>
<td>40%</td>
<td>10%</td>
<td>2%</td>
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<tr>
<td>Environment of active communication</td>
<td></td>
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<td>36%</td>
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<td>2%</td>
</tr>
<tr>
<td>Constructive feedback</td>
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<td>47%</td>
<td>43%</td>
<td>8%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Cultural competency</strong></td>
<td></td>
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</tr>
<tr>
<td>Awareness of diverse cultures and beliefs</td>
<td></td>
<td>57%</td>
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<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Foster an environment that respects cultures</td>
<td></td>
<td>58%</td>
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### Heatmap 5: Public facing competencies — Archives

<table>
<thead>
<tr>
<th>Public Facing Competencies</th>
<th>Have knowledge/skills for success</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Not relevant to role</th>
<th>% in need (minor + significant)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Patron Services and Access</strong></td>
<td></td>
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<td></td>
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<tr>
<td>Respond to patron research needs</td>
<td>78%</td>
<td>17%</td>
<td>1%</td>
<td>4%</td>
<td>18%</td>
</tr>
<tr>
<td>Use online tools/communities for user engagement</td>
<td>51%</td>
<td>37%</td>
<td>8%</td>
<td>4%</td>
<td>45%</td>
</tr>
<tr>
<td>Outreach services</td>
<td>34%</td>
<td>44%</td>
<td>11%</td>
<td>11%</td>
<td>55%</td>
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<tr>
<td>Opportunities for information, education, entertainment, lifelong needs</td>
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<td>45%</td>
<td>13%</td>
<td>12%</td>
<td>58%</td>
</tr>
<tr>
<td>Needs, interests of patrons across lifespan</td>
<td>27%</td>
<td>42%</td>
<td>13%</td>
<td>18%</td>
<td>55%</td>
</tr>
<tr>
<td><strong>Education and Training</strong></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Educational/ training/ interpretation programs</td>
<td>37%</td>
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<td>10%</td>
<td>13%</td>
<td>50%</td>
</tr>
<tr>
<td>Public access technology</td>
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<td>Publications/other information</td>
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<td>30%</td>
<td>6%</td>
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<td>36%</td>
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<tr>
<td><strong>Community Relations and Outreach</strong></td>
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<td></td>
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<td></td>
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<tr>
<td>Demonstrate value of institution through evaluation</td>
<td>32%</td>
<td>41%</td>
<td>16%</td>
<td>11%</td>
<td>57%</td>
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<tr>
<td>Build support for institution</td>
<td>36%</td>
<td>37%</td>
<td>16%</td>
<td>11%</td>
<td>53%</td>
</tr>
<tr>
<td>Communication, marketing, promotion of institution</td>
<td>43%</td>
<td>35%</td>
<td>10%</td>
<td>12%</td>
<td>45%</td>
</tr>
<tr>
<td>Relationships with community orgs</td>
<td>39%</td>
<td>35%</td>
<td>11%</td>
<td>15%</td>
<td>46%</td>
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</table>
### Heatmap 6: Basic competencies — Archives

<table>
<thead>
<tr>
<th>ARCHIVES</th>
<th>Have knowledge/skills for success</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Not relevant to role</th>
<th>% in need (minor + significant)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Research and Project Management</strong></td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>Methodologies for research</td>
<td>64%</td>
<td>27%</td>
<td>6%</td>
<td>3%</td>
<td>33%</td>
</tr>
<tr>
<td>Technological platforms for research</td>
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<tr>
<td>Project management principles</td>
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<td>47%</td>
<td>12%</td>
<td>4%</td>
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</tr>
<tr>
<td>Lead work teams</td>
<td>41%</td>
<td>40%</td>
<td>12%</td>
<td>7%</td>
<td>52%</td>
</tr>
<tr>
<td>Monitor/ adapt project progress</td>
<td>45%</td>
<td>42%</td>
<td>10%</td>
<td>3%</td>
<td>52%</td>
</tr>
<tr>
<td><strong>Awareness of Professional Context</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Theoretical/ historical professional underpinnings</td>
<td>65%</td>
<td>29%</td>
<td>4%</td>
<td>2%</td>
<td>33%</td>
</tr>
<tr>
<td>Basic professional models of practice</td>
<td>67%</td>
<td>27%</td>
<td>5%</td>
<td>1%</td>
<td>32%</td>
</tr>
<tr>
<td>Relationships with allied professions</td>
<td>61%</td>
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<td>7%</td>
<td>2%</td>
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<tr>
<td>Record-keeping</td>
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<td>9%</td>
<td>4%</td>
<td>48%</td>
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<td>Professional standards and best practices</td>
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<td>1%</td>
<td>33%</td>
</tr>
<tr>
<td><strong>Professional ethics</strong></td>
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<tr>
<td>Draw on basic values and ethics of sector</td>
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<td>0%</td>
<td>17%</td>
</tr>
<tr>
<td>Laws, regulations, inst'l policies, ethical standards</td>
<td>66%</td>
<td>29%</td>
<td>4%</td>
<td>1%</td>
<td>33%</td>
</tr>
<tr>
<td>Culture of ethics/ accountability</td>
<td>57%</td>
<td>34%</td>
<td>9%</td>
<td>0%</td>
<td>43%</td>
</tr>
<tr>
<td><strong>Communication and Collaboration</strong></td>
<td></td>
<td></td>
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<tr>
<td>Variety of communication methods</td>
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<tr>
<td>Communicate effectively with diverse audiences</td>
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<tr>
<td>Situation-specific communication</td>
<td>51%</td>
<td>39%</td>
<td>9%</td>
<td>1%</td>
<td>48%</td>
</tr>
<tr>
<td>Develop relationships to achieve common goals</td>
<td>70%</td>
<td>27%</td>
<td>3%</td>
<td>1%</td>
<td>30%</td>
</tr>
<tr>
<td>Work effectively in teams</td>
<td>66%</td>
<td>30%</td>
<td>3%</td>
<td>1%</td>
<td>33%</td>
</tr>
<tr>
<td>Manage org. politics, conflict, difficult coworkers</td>
<td>43%</td>
<td>44%</td>
<td>12%</td>
<td>1%</td>
<td>56%</td>
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</tbody>
</table>
### Heatmap 7: Collections competencies — Libraries

<table>
<thead>
<tr>
<th>Collections Competencies</th>
<th>Have knowledge/skills for success</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Not relevant to role</th>
<th>% in need (minor + significant)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Collection Development</strong></td>
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<tr>
<td>Build collections</td>
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<td>42%</td>
<td>10%</td>
<td>13%</td>
<td>51%</td>
</tr>
<tr>
<td>Maintain collections</td>
<td>38%</td>
<td>43%</td>
<td>8%</td>
<td>11%</td>
<td>51%</td>
</tr>
<tr>
<td>Establish/ apply criteria</td>
<td>35%</td>
<td>38%</td>
<td>14%</td>
<td>13%</td>
<td>52%</td>
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<tr>
<td>Policies and procedures</td>
<td>50%</td>
<td>30%</td>
<td>9%</td>
<td>11%</td>
<td>39%</td>
</tr>
<tr>
<td>Ensure collections quality</td>
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<td>7%</td>
<td>39%</td>
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<tr>
<td>Disaster management plan</td>
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<td>35%</td>
<td>29%</td>
<td>17%</td>
<td>64%</td>
</tr>
<tr>
<td><strong>Physical Collection Management</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Physical resources</td>
<td>49%</td>
<td>34%</td>
<td>5%</td>
<td>12%</td>
<td>39%</td>
</tr>
<tr>
<td>Control/ access to physical collections</td>
<td>30%</td>
<td>39%</td>
<td>14%</td>
<td>17%</td>
<td>53%</td>
</tr>
<tr>
<td>Organize collections</td>
<td>38%</td>
<td>39%</td>
<td>11%</td>
<td>12%</td>
<td>50%</td>
</tr>
<tr>
<td>Sustain collections over time</td>
<td>43%</td>
<td>36%</td>
<td>9%</td>
<td>11%</td>
<td>45%</td>
</tr>
<tr>
<td><strong>Physical Preservation Principles and Skills</strong></td>
<td></td>
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</tr>
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<td>Preservation activities</td>
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<tr>
<td>Conservation activities</td>
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<td>27%</td>
<td>60%</td>
</tr>
<tr>
<td>Physical protection, authentication activities</td>
<td>21%</td>
<td>31%</td>
<td>20%</td>
<td>28%</td>
<td>51%</td>
</tr>
<tr>
<td><strong>Digital Collection Management</strong></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital resources</td>
<td>14%</td>
<td>30%</td>
<td>28%</td>
<td>27%</td>
<td>58%</td>
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<tr>
<td>Organize digital collections</td>
<td>14%</td>
<td>30%</td>
<td>26%</td>
<td>30%</td>
<td>56%</td>
</tr>
<tr>
<td>Control/ access to digital collections</td>
<td>6%</td>
<td>27%</td>
<td>34%</td>
<td>33%</td>
<td>61%</td>
</tr>
<tr>
<td>Digital curation software</td>
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<td>18%</td>
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<td>43%</td>
<td>51%</td>
</tr>
<tr>
<td>Integrate tools into workflows</td>
<td>5%</td>
<td>20%</td>
<td>38%</td>
<td>37%</td>
<td>58%</td>
</tr>
<tr>
<td>Sustain digital collections over time</td>
<td>9%</td>
<td>31%</td>
<td>32%</td>
<td>28%</td>
<td>63%</td>
</tr>
<tr>
<td><strong>Digital Preservation Principles and Skills</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Preservation/ conservation of digital materials</td>
<td>6%</td>
<td>19%</td>
<td>31%</td>
<td>44%</td>
<td>50%</td>
</tr>
<tr>
<td>Ensure digital protection, authentication of collections</td>
<td>7%</td>
<td>18%</td>
<td>32%</td>
<td>43%</td>
<td>50%</td>
</tr>
<tr>
<td>Policies and procedures for digitization</td>
<td>9%</td>
<td>18%</td>
<td>32%</td>
<td>41%</td>
<td>50%</td>
</tr>
<tr>
<td>Policies and procedures for born digital materials</td>
<td>6%</td>
<td>16%</td>
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</table>
Heatmap 8: Institutional management competencies — Libraries

<table>
<thead>
<tr>
<th>LIBRARIES</th>
<th>Have knowledge/skills for success</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Not relevant to role</th>
<th>% in need (minor + significant)</th>
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<tbody>
<tr>
<td><strong>INSTITUTIONAL MANAGEMENT</strong></td>
<td></td>
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</tr>
<tr>
<td>Facility design and management</td>
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<td></td>
</tr>
<tr>
<td>Encourage patron use</td>
<td>29%</td>
<td>47%</td>
<td>10%</td>
<td>14%</td>
<td>57%</td>
</tr>
<tr>
<td>Safe environment</td>
<td>21%</td>
<td>48%</td>
<td>16%</td>
<td>15%</td>
<td>64%</td>
</tr>
<tr>
<td>Well-run environment</td>
<td>33%</td>
<td>43%</td>
<td>9%</td>
<td>15%</td>
<td>52%</td>
</tr>
<tr>
<td>Organizational Planning, Policies, and Procedures</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Understand laws</td>
<td>27%</td>
<td>50%</td>
<td>14%</td>
<td>9%</td>
<td>64%</td>
</tr>
<tr>
<td>Policies/ procedures</td>
<td>46%</td>
<td>41%</td>
<td>9%</td>
<td>4%</td>
<td>50%</td>
</tr>
<tr>
<td>Strategic planning</td>
<td>36%</td>
<td>45%</td>
<td>4%</td>
<td>15%</td>
<td>49%</td>
</tr>
<tr>
<td>Supervision and Human Resources</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruitment, selection of workforce</td>
<td>44%</td>
<td>40%</td>
<td>7%</td>
<td>9%</td>
<td>47%</td>
</tr>
<tr>
<td>Lead, empower employees</td>
<td>41%</td>
<td>47%</td>
<td>9%</td>
<td>3%</td>
<td>56%</td>
</tr>
<tr>
<td>Performance management strategies</td>
<td>27%</td>
<td>52%</td>
<td>16%</td>
<td>5%</td>
<td>68%</td>
</tr>
<tr>
<td>Performance management standards, requirements</td>
<td>24%</td>
<td>48%</td>
<td>20%</td>
<td>8%</td>
<td>68%</td>
</tr>
<tr>
<td>Work with consultants, volunteers</td>
<td>45%</td>
<td>36%</td>
<td>7%</td>
<td>12%</td>
<td>43%</td>
</tr>
<tr>
<td>Support staff career development</td>
<td>38%</td>
<td>42%</td>
<td>12%</td>
<td>8%</td>
<td>54%</td>
</tr>
<tr>
<td>Institutional Affiliations and Financial Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Institutional credibility</td>
<td>30%</td>
<td>20%</td>
<td>10%</td>
<td></td>
<td>40%</td>
</tr>
<tr>
<td>Information, feedback from advisory bodies</td>
<td>37%</td>
<td>27%</td>
<td>10%</td>
<td></td>
<td>26%</td>
</tr>
<tr>
<td>Basic budget/ finance understanding</td>
<td>49%</td>
<td>34%</td>
<td>10%</td>
<td></td>
<td>7%</td>
</tr>
<tr>
<td>Financial processes</td>
<td>37%</td>
<td>38%</td>
<td>11%</td>
<td></td>
<td>14%</td>
</tr>
<tr>
<td>Identify, pursue multiple funding sources</td>
<td>22%</td>
<td>34%</td>
<td>21%</td>
<td></td>
<td>23%</td>
</tr>
</tbody>
</table>
### Heatmap 9: Technology competencies — Libraries

<table>
<thead>
<tr>
<th>TECHNOLOGY</th>
<th>Have knowledge/skills for success</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Not relevant to role</th>
<th>% in need (minor + significant)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>LIBRARIES</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Core technology</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Basic computer functions and tasks</td>
<td>65%</td>
<td>27%</td>
<td>5%</td>
<td>3%</td>
<td>32%</td>
</tr>
<tr>
<td>Basic functions of email and web-based resources</td>
<td>70%</td>
<td>22%</td>
<td>5%</td>
<td>3%</td>
<td>27%</td>
</tr>
<tr>
<td>Apply technologies for learning/ collaboration</td>
<td>56%</td>
<td>35%</td>
<td>8%</td>
<td>1%</td>
<td>43%</td>
</tr>
<tr>
<td>Intermediate/Advanced Technology</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Automation systems</td>
<td>29%</td>
<td>33%</td>
<td>15%</td>
<td>23%</td>
<td>48%</td>
</tr>
<tr>
<td>Enterprise computing systems</td>
<td>13%</td>
<td>30%</td>
<td>21%</td>
<td>36%</td>
<td>51%</td>
</tr>
<tr>
<td>Network and security systems</td>
<td>7%</td>
<td>23%</td>
<td>28%</td>
<td>42%</td>
<td>51%</td>
</tr>
<tr>
<td>Server administration systems</td>
<td>3%</td>
<td>18%</td>
<td>33%</td>
<td>46%</td>
<td>51%</td>
</tr>
<tr>
<td>Technology planning</td>
<td>14%</td>
<td>35%</td>
<td>27%</td>
<td>24%</td>
<td>62%</td>
</tr>
<tr>
<td>Web design/ development</td>
<td>12%</td>
<td>37%</td>
<td>26%</td>
<td>25%</td>
<td>63%</td>
</tr>
</tbody>
</table>
### Heatmap 10: Leadership competencies — Libraries

<table>
<thead>
<tr>
<th>LIBRARIES</th>
<th>Have knowledge/skills for success</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Not relevant to role</th>
<th>% in need (minor + significant)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Flexible and Reflective Thinking</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Innovative thinking about mission and goals</td>
<td>46%</td>
<td>42%</td>
<td>10%</td>
<td>2%</td>
<td>52%</td>
</tr>
<tr>
<td>Assess organizational shortcomings/assets</td>
<td>22%</td>
<td>34%</td>
<td>21%</td>
<td>23%</td>
<td>55%</td>
</tr>
<tr>
<td>Continuous improvement</td>
<td>41%</td>
<td>44%</td>
<td>14%</td>
<td>1%</td>
<td>58%</td>
</tr>
<tr>
<td>Consider impact in community and beyond</td>
<td>39%</td>
<td>44%</td>
<td>15%</td>
<td>2%</td>
<td>59%</td>
</tr>
<tr>
<td>Impactful ideas, environments, technologies</td>
<td>31%</td>
<td>47%</td>
<td>20%</td>
<td>2%</td>
<td>67%</td>
</tr>
<tr>
<td>Anticipate problems/opportunities</td>
<td>39%</td>
<td>45%</td>
<td>15%</td>
<td>1%</td>
<td>60%</td>
</tr>
<tr>
<td><strong>Planning and Making Effective Decisions</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Short-term/long-term planning</td>
<td>39%</td>
<td>45%</td>
<td>15%</td>
<td>1%</td>
<td>60%</td>
</tr>
<tr>
<td>Identify clear outcomes</td>
<td>37%</td>
<td>47%</td>
<td>15%</td>
<td>1%</td>
<td>62%</td>
</tr>
<tr>
<td>Evidence-based decision making</td>
<td>28%</td>
<td>47%</td>
<td>23%</td>
<td>2%</td>
<td>70%</td>
</tr>
<tr>
<td>Responsibility for decisions</td>
<td>60%</td>
<td>31%</td>
<td>6%</td>
<td>3%</td>
<td>37%</td>
</tr>
<tr>
<td>Decisional transparency</td>
<td>55%</td>
<td>36%</td>
<td>7%</td>
<td>2%</td>
<td>43%</td>
</tr>
<tr>
<td><strong>Leading through Change</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internal/external support for change</td>
<td>27%</td>
<td>53%</td>
<td>18%</td>
<td>2%</td>
<td>71%</td>
</tr>
<tr>
<td>Collaborate during change</td>
<td>42%</td>
<td>46%</td>
<td>15%</td>
<td>1%</td>
<td>57%</td>
</tr>
<tr>
<td>Build community relationships</td>
<td>40%</td>
<td>42%</td>
<td>15%</td>
<td>3%</td>
<td>57%</td>
</tr>
<tr>
<td>Environment that encourages problem solving</td>
<td>37%</td>
<td>45%</td>
<td>15%</td>
<td>3%</td>
<td>60%</td>
</tr>
<tr>
<td><strong>Engaging, motivating, and inspiring</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Motivate individuals to contribute</td>
<td>41%</td>
<td>43%</td>
<td>13%</td>
<td>3%</td>
<td>56%</td>
</tr>
<tr>
<td>Environment of trust and integrity</td>
<td>56%</td>
<td>35%</td>
<td>7%</td>
<td>2%</td>
<td>42%</td>
</tr>
<tr>
<td>Inspire others to think creatively</td>
<td>41%</td>
<td>41%</td>
<td>17%</td>
<td>1%</td>
<td>58%</td>
</tr>
<tr>
<td>Environment of active communication</td>
<td>48%</td>
<td>40%</td>
<td>11%</td>
<td>1%</td>
<td>51%</td>
</tr>
<tr>
<td>Constructive feedback</td>
<td>45%</td>
<td>42%</td>
<td>12%</td>
<td>1%</td>
<td>54%</td>
</tr>
<tr>
<td><strong>Cultural competency</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Awareness of diverse cultures and beliefs</td>
<td>55%</td>
<td>38%</td>
<td>5%</td>
<td>2%</td>
<td>43%</td>
</tr>
<tr>
<td>Foster an environment that respects cultures</td>
<td>55%</td>
<td>38%</td>
<td>4%</td>
<td>3%</td>
<td>42%</td>
</tr>
</tbody>
</table>
### Heatmap 11: Public facing competencies — Libraries

<table>
<thead>
<tr>
<th>LIBRARIES</th>
<th>Have knowledge/skills for success</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Not relevant to role</th>
<th>% in need (minor + significant)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PUBLIC FACING</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Patron Services and Access</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Respond to patron research needs</td>
<td>65% [green]</td>
<td>25% [orange]</td>
<td>4% [grey]</td>
<td>6% [red]</td>
<td>29% [red+grey]</td>
</tr>
<tr>
<td>Use online tools/communities for user engagement</td>
<td>51% [green]</td>
<td>36% [orange]</td>
<td>8% [grey]</td>
<td>5% [red]</td>
<td>44% [red+grey]</td>
</tr>
<tr>
<td>Outreach services</td>
<td>27% [green]</td>
<td>47% [orange]</td>
<td>16% [grey]</td>
<td>10% [red]</td>
<td>63% [red+grey]</td>
</tr>
<tr>
<td>Opportunities for information, education, entertainment, lifelong learning</td>
<td>34% [green]</td>
<td>45% [orange]</td>
<td>12% [grey]</td>
<td>9% [red]</td>
<td>57% [red+grey]</td>
</tr>
<tr>
<td>Needs, interests of patrons across lifespan</td>
<td>29% [green]</td>
<td>45% [orange]</td>
<td>11% [grey]</td>
<td>15% [red]</td>
<td>56% [red+grey]</td>
</tr>
<tr>
<td><strong>Education and Training</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Educational/training/interpretation programs</td>
<td>40% [green]</td>
<td>41% [orange]</td>
<td>11% [grey]</td>
<td>8% [red]</td>
<td>52% [red+grey]</td>
</tr>
<tr>
<td>Public access technology</td>
<td>44% [green]</td>
<td>35% [orange]</td>
<td>9% [grey]</td>
<td>12% [red]</td>
<td>44% [red+grey]</td>
</tr>
<tr>
<td>Publications/other information</td>
<td>38% [green]</td>
<td>37% [orange]</td>
<td>13% [grey]</td>
<td>12% [red]</td>
<td>50% [red+grey]</td>
</tr>
<tr>
<td>Patron training</td>
<td>45% [green]</td>
<td>35% [orange]</td>
<td>8% [grey]</td>
<td>12% [red]</td>
<td>43% [red+grey]</td>
</tr>
<tr>
<td><strong>Community Relations and Outreach</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrate value of institution through evaluation</td>
<td>27% [green]</td>
<td>46% [orange]</td>
<td>19% [grey]</td>
<td>8% [red]</td>
<td>65% [red+grey]</td>
</tr>
<tr>
<td>Build support for institution</td>
<td>28% [green]</td>
<td>44% [orange]</td>
<td>20% [grey]</td>
<td>7% [red]</td>
<td>64% [red+grey]</td>
</tr>
<tr>
<td>Communication, marketing, promotion of institution</td>
<td>34% [green]</td>
<td>42% [orange]</td>
<td>15% [grey]</td>
<td>9% [red]</td>
<td>57% [red+grey]</td>
</tr>
<tr>
<td>Relationships with community organizations</td>
<td>33% [green]</td>
<td>42% [orange]</td>
<td>15% [grey]</td>
<td>10% [red]</td>
<td>57% [red+grey]</td>
</tr>
</tbody>
</table>
## Heatmap 12: Basic competencies — Libraries

<table>
<thead>
<tr>
<th>LIBRARIES</th>
<th>Have knowledge/skills for success</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Not relevant to role</th>
<th>% in need (minor + significant)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Research and Project Management</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Methodologies for research</td>
<td>45%</td>
<td>36%</td>
<td>10%</td>
<td>9%</td>
<td>46%</td>
</tr>
<tr>
<td>Technological platforms for research</td>
<td>42%</td>
<td>37%</td>
<td>12%</td>
<td>9%</td>
<td>49%</td>
</tr>
<tr>
<td>Project management principles</td>
<td>29%</td>
<td>48%</td>
<td>17%</td>
<td>6%</td>
<td>65%</td>
</tr>
<tr>
<td>Lead work teams</td>
<td>35%</td>
<td>45%</td>
<td>12%</td>
<td>8%</td>
<td>57%</td>
</tr>
<tr>
<td>Monitor/ adapt project progress</td>
<td>34%</td>
<td>44%</td>
<td>16%</td>
<td>6%</td>
<td>60%</td>
</tr>
<tr>
<td><strong>Awareness of Professional Context</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Theoretical/ historical professional underpinnings</td>
<td>48%</td>
<td>39%</td>
<td>9%</td>
<td>4%</td>
<td>48%</td>
</tr>
<tr>
<td>Basic professional models of practice</td>
<td>53%</td>
<td>36%</td>
<td>9%</td>
<td>2%</td>
<td>45%</td>
</tr>
<tr>
<td>Relationships with allied professions</td>
<td>49%</td>
<td>38%</td>
<td>9%</td>
<td>4%</td>
<td>47%</td>
</tr>
<tr>
<td>Record-keeping</td>
<td>35%</td>
<td>43%</td>
<td>16%</td>
<td>6%</td>
<td>59%</td>
</tr>
<tr>
<td>Professional standards and best practices</td>
<td>55%</td>
<td>38%</td>
<td>6%</td>
<td>1%</td>
<td>44%</td>
</tr>
<tr>
<td><strong>Professional ethics</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Draw on basic values and ethics of my sector</td>
<td>74%</td>
<td>23%</td>
<td>2%</td>
<td>1%</td>
<td>25%</td>
</tr>
<tr>
<td>Laws, regulations, institutional policies, ethical standards of sector</td>
<td>55%</td>
<td>38%</td>
<td>6%</td>
<td>1%</td>
<td>44%</td>
</tr>
<tr>
<td>Culture of ethics/ accountability</td>
<td>51%</td>
<td>40%</td>
<td>7%</td>
<td>2%</td>
<td>47%</td>
</tr>
<tr>
<td><strong>Communication and Collaboration</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Variety of communication methods</td>
<td>71%</td>
<td>26%</td>
<td>2%</td>
<td>1%</td>
<td>28%</td>
</tr>
<tr>
<td>Communicate effectively with diverse audiences</td>
<td>68%</td>
<td>29%</td>
<td>3%</td>
<td></td>
<td>32%</td>
</tr>
<tr>
<td>Situation-specific communication</td>
<td>46%</td>
<td>44%</td>
<td>10%</td>
<td></td>
<td>54%</td>
</tr>
<tr>
<td>Develop relationships to achieve common goals</td>
<td>62%</td>
<td>34%</td>
<td>4%</td>
<td></td>
<td>38%</td>
</tr>
<tr>
<td>Work effectively in teams</td>
<td>59%</td>
<td>34%</td>
<td>6%</td>
<td>1%</td>
<td>40%</td>
</tr>
<tr>
<td>Manage organizational politics, conflict and difficult coworkers</td>
<td>35%</td>
<td>48%</td>
<td>18%</td>
<td>1%</td>
<td>64%</td>
</tr>
</tbody>
</table>
## Heatmap 13: Collections competencies — Museums

<table>
<thead>
<tr>
<th>MUSEUMS/HISTORICAL SOCIETIES</th>
<th><strong>COLLECTIONS</strong></th>
<th>Have knowledge/skills for success</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Not relevant to role</th>
<th>% in need (minor + significant)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Collection Development</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Build collections</td>
<td>24%</td>
<td>35%</td>
<td>13%</td>
<td>28%</td>
<td>48%</td>
<td></td>
</tr>
<tr>
<td>Maintain collections</td>
<td>28%</td>
<td>43%</td>
<td>9%</td>
<td>20%</td>
<td>52%</td>
<td></td>
</tr>
<tr>
<td>Establish/apply criteria</td>
<td>35%</td>
<td>36%</td>
<td>12%</td>
<td>17%</td>
<td>48%</td>
<td></td>
</tr>
<tr>
<td>Policies and procedures</td>
<td>50%</td>
<td>28%</td>
<td>8%</td>
<td>14%</td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>Ensure collections quality</td>
<td>58%</td>
<td>30%</td>
<td>5%</td>
<td>7%</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Disaster management plan</td>
<td>36%</td>
<td>41%</td>
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<td>8%</td>
<td>56%</td>
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<tr>
<td><strong>Physical Collection Management</strong></td>
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</tr>
<tr>
<td>Physical resources</td>
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<td>35%</td>
<td>5%</td>
<td>10%</td>
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</tr>
<tr>
<td>Control/ access to physical collections</td>
<td>36%</td>
<td>40%</td>
<td>12%</td>
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<td>52%</td>
<td></td>
</tr>
<tr>
<td>Organize collections</td>
<td>33%</td>
<td>41%</td>
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<td>13%</td>
<td>54%</td>
<td></td>
</tr>
<tr>
<td>Sustain collections over time</td>
<td>46%</td>
<td>38%</td>
<td>7%</td>
<td>9%</td>
<td>45%</td>
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</tr>
<tr>
<td><strong>Physical Preservation Principles and Skills</strong></td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Preservation activities</td>
<td>50%</td>
<td>33%</td>
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<tr>
<td>Conservation activities</td>
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<td>29%</td>
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<tr>
<td>Physical protection, authentication activities</td>
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</tr>
<tr>
<td><strong>Digital Collection Management</strong></td>
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<tr>
<td>Digital resources</td>
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<td>29%</td>
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<td>24%</td>
<td>62%</td>
<td></td>
</tr>
<tr>
<td>Organize digital collections</td>
<td>17%</td>
<td>28%</td>
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<td>25%</td>
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</tr>
<tr>
<td>Control/ access to digital collections</td>
<td>8%</td>
<td>24%</td>
<td>39%</td>
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</tr>
<tr>
<td>Digital curation software</td>
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<td>22%</td>
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<td>58%</td>
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</tr>
<tr>
<td>Integrate tools into workflows</td>
<td>7%</td>
<td>23%</td>
<td>41%</td>
<td>29%</td>
<td>64%</td>
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</tr>
<tr>
<td>Sustain digital collections over time</td>
<td>6%</td>
<td>26%</td>
<td>41%</td>
<td>27%</td>
<td>67%</td>
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</tr>
<tr>
<td><strong>Digital Preservation Principles and Skills</strong></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Preservation/ conservation of digital materials</td>
<td>5%</td>
<td>31%</td>
<td>40%</td>
<td>23%</td>
<td>71%</td>
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</tr>
<tr>
<td>Ensure digital protection, authentication of collections</td>
<td>7%</td>
<td>31%</td>
<td>35%</td>
<td>27%</td>
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</tr>
<tr>
<td>Policies and procedures for digitization</td>
<td>12%</td>
<td>34%</td>
<td>35%</td>
<td>27%</td>
<td>63%</td>
<td></td>
</tr>
<tr>
<td>Policies and procedures for born digital materials</td>
<td>9%</td>
<td>26%</td>
<td>39%</td>
<td>26%</td>
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</table>
### Heatmap 14: Institutional management competencies — Museums

<table>
<thead>
<tr>
<th>MUSEUMS/HISTORICAL SOCIETIES</th>
<th>Have knowledge/skills for success</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Not relevant to role</th>
<th>% in need (minor + significant)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>INSTITUTIONAL MANAGEMENT</strong></td>
<td></td>
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</tr>
<tr>
<td>Facility design and management</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Encourage patron use</td>
<td>26%</td>
<td>50%</td>
<td>15%</td>
<td>9%</td>
<td>65%</td>
</tr>
<tr>
<td>Safe environment</td>
<td>21%</td>
<td>41%</td>
<td>19%</td>
<td>19%</td>
<td>60%</td>
</tr>
<tr>
<td>Well-run environment</td>
<td>31%</td>
<td>47%</td>
<td>8%</td>
<td>14%</td>
<td>55%</td>
</tr>
<tr>
<td>Organizational Planning, Policies, and Procedures</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Understand laws</td>
<td>25%</td>
<td>46%</td>
<td>18%</td>
<td>11%</td>
<td>64%</td>
</tr>
<tr>
<td>Policies/ procedures</td>
<td>39%</td>
<td>43%</td>
<td>9%</td>
<td>9%</td>
<td>52%</td>
</tr>
<tr>
<td>Strategic planning</td>
<td>36%</td>
<td>42%</td>
<td>7%</td>
<td>15%</td>
<td>49%</td>
</tr>
<tr>
<td>Supervision and Human Resources</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruitment, selection of workforce</td>
<td>40%</td>
<td>39%</td>
<td>11%</td>
<td>10%</td>
<td>50%</td>
</tr>
<tr>
<td>Lead, empower employees</td>
<td>41%</td>
<td>43%</td>
<td>10%</td>
<td>6%</td>
<td>53%</td>
</tr>
<tr>
<td>Performance management strategies</td>
<td>29%</td>
<td>45%</td>
<td>18%</td>
<td>8%</td>
<td>63%</td>
</tr>
<tr>
<td>Performance management standards, requirements</td>
<td>22%</td>
<td>41%</td>
<td>24%</td>
<td>13%</td>
<td>65%</td>
</tr>
<tr>
<td>Work with consultants, volunteers</td>
<td>51%</td>
<td>38%</td>
<td>4%</td>
<td>7%</td>
<td>42%</td>
</tr>
<tr>
<td>Support staff career development</td>
<td>35%</td>
<td>43%</td>
<td>12%</td>
<td>10%</td>
<td>55%</td>
</tr>
<tr>
<td>Institutional Affiliations and Financial Management</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Institutional credibility</td>
<td>34%</td>
<td>26%</td>
<td>14%</td>
<td>26%</td>
<td>40%</td>
</tr>
<tr>
<td>Information, feedback from advisory bodies</td>
<td>36%</td>
<td>33%</td>
<td>12%</td>
<td>19%</td>
<td>45%</td>
</tr>
<tr>
<td>Basic budget/ finance understanding</td>
<td>49%</td>
<td>36%</td>
<td>9%</td>
<td>6%</td>
<td>45%</td>
</tr>
<tr>
<td>Financial processes</td>
<td>37%</td>
<td>40%</td>
<td>12%</td>
<td>11%</td>
<td>52%</td>
</tr>
<tr>
<td>Identify, pursue multiple funding sources</td>
<td>29%</td>
<td>30%</td>
<td>22%</td>
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## Heatmap 15: Technology competencies — Museums

<table>
<thead>
<tr>
<th>MUSEUMS/HISTORICAL SOCIETIES</th>
<th>Have knowledge/skills for success</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Not relevant to role</th>
<th>% in need (minor + significant)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TECHNOLOGY</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td><strong>Core technology</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Basic computer functions and tasks</td>
<td>68%</td>
<td>25%</td>
<td>5%</td>
<td>2%</td>
<td>30%</td>
</tr>
<tr>
<td>Basic functions of email and web-based resources</td>
<td>68%</td>
<td>24%</td>
<td>4%</td>
<td>4%</td>
<td>28%</td>
</tr>
<tr>
<td>Apply technologies for learning/ collaboration</td>
<td>46%</td>
<td>40%</td>
<td>12%</td>
<td>2%</td>
<td>52%</td>
</tr>
<tr>
<td><strong>Intermediate/Advanced Technology</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Automation systems</td>
<td>17%</td>
<td>24%</td>
<td>14%</td>
<td>4%</td>
<td>38%</td>
</tr>
<tr>
<td>Enterprise computing systems</td>
<td>8%</td>
<td>19%</td>
<td>16%</td>
<td>57%</td>
<td>35%</td>
</tr>
<tr>
<td>Network and security systems</td>
<td>5%</td>
<td>24%</td>
<td>18%</td>
<td>53%</td>
<td>42%</td>
</tr>
<tr>
<td>Server administration systems</td>
<td>4%</td>
<td>18%</td>
<td>22%</td>
<td>57%</td>
<td>40%</td>
</tr>
<tr>
<td>Technology planning</td>
<td>9%</td>
<td>33%</td>
<td>23%</td>
<td>35%</td>
<td>56%</td>
</tr>
<tr>
<td>Web design/ development</td>
<td>13%</td>
<td>29%</td>
<td>24%</td>
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</table>
### Heatmap 16: Leadership competencies — Museums

<table>
<thead>
<tr>
<th>MUSEUMS/HISTORICAL SOCIETIES</th>
<th>Have knowledge/skills for success</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Not relevant to role</th>
<th>% in need (minor + significant)</th>
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</thead>
<tbody>
<tr>
<td><strong>LEADERSHIP</strong></td>
<td></td>
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</tr>
<tr>
<td><strong>Flexible and Reflective Thinking</strong></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Innovative thinking about mission and goals</td>
<td>50%</td>
<td>41%</td>
<td>8%</td>
<td>1%</td>
<td>49%</td>
</tr>
<tr>
<td>Assess organizational shortcomings/ assets</td>
<td>29%</td>
<td>30%</td>
<td>22%</td>
<td>19%</td>
<td>52%</td>
</tr>
<tr>
<td>Continuous improvement</td>
<td>40%</td>
<td>48%</td>
<td>11%</td>
<td>1%</td>
<td>59%</td>
</tr>
<tr>
<td>Consider impact in community and beyond</td>
<td>39%</td>
<td>42%</td>
<td>16%</td>
<td>3%</td>
<td>58%</td>
</tr>
<tr>
<td>Impactful ideas, environments, technologies</td>
<td>29%</td>
<td>46%</td>
<td>22%</td>
<td>3%</td>
<td>68%</td>
</tr>
<tr>
<td>Anticipate problems/ opportunities</td>
<td>40%</td>
<td>47%</td>
<td>12%</td>
<td>1%</td>
<td>59%</td>
</tr>
<tr>
<td><strong>Planning and Making Effective Decisions</strong></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Short-term/ long-term planning</td>
<td>40%</td>
<td>47%</td>
<td>12%</td>
<td>1%</td>
<td>59%</td>
</tr>
<tr>
<td>Identify clear outcomes</td>
<td>42%</td>
<td>45%</td>
<td>12%</td>
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<td>57%</td>
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<tr>
<td>Evidence-based decision making</td>
<td>26%</td>
<td>48%</td>
<td>23%</td>
<td>3%</td>
<td>71%</td>
</tr>
<tr>
<td>Responsibility for decisions</td>
<td>60%</td>
<td>31%</td>
<td>6%</td>
<td>3%</td>
<td>37%</td>
</tr>
<tr>
<td>Decisional transparency</td>
<td>57%</td>
<td>37%</td>
<td>5%</td>
<td>1%</td>
<td>42%</td>
</tr>
<tr>
<td><strong>Leading through Change</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internal/ external support for change</td>
<td>25%</td>
<td>51%</td>
<td>21%</td>
<td>3%</td>
<td>72%</td>
</tr>
<tr>
<td>Collaborate during change</td>
<td>42%</td>
<td>45%</td>
<td>13%</td>
<td>3%</td>
<td>58%</td>
</tr>
<tr>
<td>Build community relationships</td>
<td>37%</td>
<td>39%</td>
<td>19%</td>
<td>5%</td>
<td>58%</td>
</tr>
<tr>
<td>Environment that encourages problem solving</td>
<td>39%</td>
<td>43%</td>
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<td>2%</td>
<td>59%</td>
</tr>
<tr>
<td><strong>Engaging, motivating, and inspiring</strong></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Motivate individuals to contribute</td>
<td>41%</td>
<td>45%</td>
<td>11%</td>
<td>3%</td>
<td>56%</td>
</tr>
<tr>
<td>Environment of trust and integrity</td>
<td>58%</td>
<td>36%</td>
<td>4%</td>
<td>2%</td>
<td>40%</td>
</tr>
<tr>
<td>Inspire others to think creatively</td>
<td>46%</td>
<td>44%</td>
<td>9%</td>
<td>1%</td>
<td>53%</td>
</tr>
<tr>
<td>Environment of active communication</td>
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<td>43%</td>
<td>7%</td>
<td>1%</td>
<td>50%</td>
</tr>
<tr>
<td>Constructive feedback</td>
<td>48%</td>
<td>43%</td>
<td>9%</td>
<td></td>
<td>52%</td>
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<tr>
<td><strong>Cultural competency</strong></td>
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<tr>
<td>Awareness of diverse cultures and beliefs</td>
<td>56%</td>
<td>37%</td>
<td>6%</td>
<td>1%</td>
<td>43%</td>
</tr>
<tr>
<td>Foster an environment that respects cultures</td>
<td>60%</td>
<td>33%</td>
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</table>
## Heatmap 17: Public facing competencies — Museums

<table>
<thead>
<tr>
<th>MUSEUMS/HISTORICAL SOCIETIES</th>
<th>Have knowledge/skills for success</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Not relevant to role</th>
<th>% in need (minor + significant)</th>
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<tbody>
<tr>
<td><strong>PUBLIC FACING</strong></td>
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</tr>
<tr>
<td><strong>Patron Services and Access</strong></td>
<td></td>
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</tr>
<tr>
<td>Respond to patron research needs</td>
<td>49%</td>
<td>29%</td>
<td>7%</td>
<td>14%</td>
<td>36%</td>
</tr>
<tr>
<td>Use online tools/ communities for user engagement</td>
<td>27%</td>
<td>37%</td>
<td>20%</td>
<td>16%</td>
<td>57%</td>
</tr>
<tr>
<td>Outreach services</td>
<td>19%</td>
<td>42%</td>
<td>19%</td>
<td>20%</td>
<td>61%</td>
</tr>
<tr>
<td>Opportunities for information, education, entertainment, lifelong needs, interests of patrons across lifespan</td>
<td>29%</td>
<td>40%</td>
<td>16%</td>
<td>15%</td>
<td>56%</td>
</tr>
<tr>
<td>Patron training</td>
<td>23%</td>
<td>41%</td>
<td>17%</td>
<td>19%</td>
<td>58%</td>
</tr>
<tr>
<td><strong>Education and Training</strong></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Educational/ training/ interpretation programs</td>
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<td>31%</td>
<td>12%</td>
<td>15%</td>
<td>43%</td>
</tr>
<tr>
<td>Public access technology</td>
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<td>15%</td>
<td>41%</td>
<td>40%</td>
</tr>
<tr>
<td>Publications/ other information</td>
<td>30%</td>
<td>37%</td>
<td>12%</td>
<td>21%</td>
<td>49%</td>
</tr>
<tr>
<td>Patron training</td>
<td>25%</td>
<td>30%</td>
<td>10%</td>
<td>35%</td>
<td>40%</td>
</tr>
<tr>
<td><strong>Community Relations and Outreach</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrate value of institution through evaluation</td>
<td>27%</td>
<td>40%</td>
<td>21%</td>
<td>12%</td>
<td>61%</td>
</tr>
<tr>
<td>Build support for institution</td>
<td>27%</td>
<td>43%</td>
<td>19%</td>
<td>11%</td>
<td>62%</td>
</tr>
<tr>
<td>Communication, marketing, promotion of institution</td>
<td>31%</td>
<td>39%</td>
<td>14%</td>
<td>16%</td>
<td>53%</td>
</tr>
<tr>
<td>Relationships with community organizations</td>
<td>38%</td>
<td>36%</td>
<td>14%</td>
<td>12%</td>
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</tr>
</tbody>
</table>
### Heatmap 18: Basic competencies — Museums

<table>
<thead>
<tr>
<th>MUSEUMS/HISTORICAL SOCIETIES</th>
<th>Have knowledge/skills for success</th>
<th>Need minor improvement</th>
<th>Need significant improvement</th>
<th>Not relevant</th>
<th>% in need (minor + significant)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Research and Project Management</strong></td>
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<td></td>
</tr>
<tr>
<td>Methodologies for research</td>
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<td>13%</td>
<td>5%</td>
<td>51%</td>
</tr>
<tr>
<td>Technological platforms for research</td>
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<td>40%</td>
<td>19%</td>
<td>6%</td>
<td>59%</td>
</tr>
<tr>
<td>Project management principles</td>
<td>35%</td>
<td>43%</td>
<td>18%</td>
<td>4%</td>
<td>61%</td>
</tr>
<tr>
<td>Lead work teams</td>
<td>41%</td>
<td>40%</td>
<td>15%</td>
<td>4%</td>
<td>55%</td>
</tr>
<tr>
<td>Monitor/ adapt project progress</td>
<td>41%</td>
<td>43%</td>
<td>14%</td>
<td>2%</td>
<td>57%</td>
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<tr>
<td><strong>Awareness of Professional Context</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Theoretical/ historical professional underpinnings</td>
<td>52%</td>
<td>34%</td>
<td>11%</td>
<td>3%</td>
<td>45%</td>
</tr>
<tr>
<td>Basic professional models of practice</td>
<td>56%</td>
<td>35%</td>
<td>7%</td>
<td>2%</td>
<td>42%</td>
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<tr>
<td>Relationships with allied professions</td>
<td>55%</td>
<td>34%</td>
<td>10%</td>
<td>1%</td>
<td>44%</td>
</tr>
<tr>
<td>Record-keeping</td>
<td>40%</td>
<td>40%</td>
<td>16%</td>
<td>4%</td>
<td>56%</td>
</tr>
<tr>
<td>Professional standards and best practices</td>
<td>62%</td>
<td>30%</td>
<td>7%</td>
<td>1%</td>
<td>37%</td>
</tr>
<tr>
<td><strong>Professional ethics</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Draw on basic values and ethics of my sector</td>
<td>73%</td>
<td>20%</td>
<td>3%</td>
<td>4%</td>
<td>23%</td>
</tr>
<tr>
<td>Laws, regulations, institutional policies, ethical standards of sector</td>
<td>62%</td>
<td>30%</td>
<td>7%</td>
<td>1%</td>
<td>37%</td>
</tr>
<tr>
<td>Culture of ethics/ accountability</td>
<td>47%</td>
<td>39%</td>
<td>10%</td>
<td>4%</td>
<td>49%</td>
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<tr>
<td><strong>Communication and Collaboration</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Variety of communication methods</td>
<td>70%</td>
<td>23%</td>
<td>5%</td>
<td>2%</td>
<td>28%</td>
</tr>
<tr>
<td>Communicate effectively with diverse audiences</td>
<td>64%</td>
<td>31%</td>
<td>5%</td>
<td>3%</td>
<td>36%</td>
</tr>
<tr>
<td>Situation- specific communication</td>
<td>40%</td>
<td>48%</td>
<td>11%</td>
<td>1%</td>
<td>59%</td>
</tr>
<tr>
<td>Develop relationships to achieve common goals</td>
<td>67%</td>
<td>30%</td>
<td>3%</td>
<td>1%</td>
<td>33%</td>
</tr>
<tr>
<td>Work effectively in teams</td>
<td>63%</td>
<td>32%</td>
<td>4%</td>
<td>1%</td>
<td>36%</td>
</tr>
<tr>
<td>Manage org. politics, conflict, difficult coworkers</td>
<td>35%</td>
<td>49%</td>
<td>15%</td>
<td>1%</td>
<td>64%</td>
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</table>
Heatmap 19: Archives — Perceived professional development support by competency area
Heatmap 20: Libraries — Perceived professional development support by competency area

<table>
<thead>
<tr>
<th>Competency Area</th>
<th>Basic</th>
<th>Collections</th>
<th>Institutional</th>
<th>Leadership</th>
<th>Public-facing</th>
<th>Technology</th>
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<td>AB/C gaps-funding</td>
<td>Adequate level of funding/financial support for me to engage in CE/PD</td>
<td>Not at all true</td>
<td>1.65</td>
<td>1.88</td>
<td>1.77</td>
<td>1.71</td>
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<tr>
<td></td>
<td>Rarely true</td>
<td>1.50</td>
<td>1.83</td>
<td>1.77</td>
<td>1.66</td>
<td>1.76</td>
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<tr>
<td></td>
<td>Somewhat true</td>
<td>1.62</td>
<td>1.99</td>
<td>1.71</td>
<td>1.76</td>
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<td></td>
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<td>1.59</td>
<td>1.97</td>
<td>1.66</td>
<td>1.87</td>
<td>1.80</td>
</tr>
<tr>
<td>Overall mean</td>
<td>1.60</td>
<td>1.94</td>
<td>1.74</td>
<td>1.69</td>
<td>1.78</td>
<td>1.84</td>
</tr>
<tr>
<td>AB/C gaps-coverage</td>
<td>Adequate level of staff coverage for me to engage in CE/PD</td>
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<td>1.85</td>
<td>1.78</td>
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</tr>
<tr>
<td></td>
<td>Rarely true</td>
<td>1.58</td>
<td>1.99</td>
<td>1.81</td>
<td>1.85</td>
<td>1.77</td>
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<td>1.59</td>
<td>1.91</td>
<td>1.72</td>
<td>1.69</td>
<td>1.73</td>
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<td>1.74</td>
<td>1.86</td>
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<tr>
<td>Overall mean</td>
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<td>1.95</td>
<td>1.74</td>
<td>1.70</td>
<td>1.78</td>
<td>1.84</td>
</tr>
<tr>
<td>AB/C gaps-resources</td>
<td>Adequate level of CE/PD resources available</td>
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<td>Somewhat true</td>
<td>1.61</td>
<td>1.93</td>
<td>1.74</td>
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<td>1.81</td>
</tr>
<tr>
<td></td>
<td>Completely true</td>
<td>1.61</td>
<td>1.99</td>
<td>1.74</td>
<td>1.70</td>
<td>1.79</td>
</tr>
<tr>
<td>Overall mean</td>
<td>1.60</td>
<td>1.94</td>
<td>1.74</td>
<td>1.70</td>
<td>1.76</td>
<td>1.84</td>
</tr>
<tr>
<td>AB/C gaps-expectations</td>
<td>A general expectation that everyone engage in CE/PD</td>
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<td>1.74</td>
<td>1.69</td>
<td>1.66</td>
</tr>
<tr>
<td></td>
<td>Rarely true</td>
<td>1.59</td>
<td>1.93</td>
<td>1.74</td>
<td>1.69</td>
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</tr>
<tr>
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<td>1.97</td>
<td>1.74</td>
<td>1.71</td>
<td>1.81</td>
</tr>
<tr>
<td></td>
<td>Completely true</td>
<td>1.55</td>
<td>1.96</td>
<td>1.75</td>
<td>1.69</td>
<td>1.76</td>
</tr>
<tr>
<td>Overall mean</td>
<td>1.60</td>
<td>1.94</td>
<td>1.74</td>
<td>1.69</td>
<td>1.78</td>
<td>1.83</td>
</tr>
<tr>
<td>A/BC gaps-supervisor support</td>
<td>Practical support from my supervisors or leadership to engage in CE/PD</td>
<td>Not at all true</td>
<td>1.71</td>
<td>1.92</td>
<td>1.59</td>
<td>1.93</td>
</tr>
<tr>
<td></td>
<td>Rarely true</td>
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<td>1.72</td>
<td>1.84</td>
<td>1.67</td>
<td>1.69</td>
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<tr>
<td></td>
<td>Somewhat true</td>
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<td>1.94</td>
<td>1.73</td>
<td>1.68</td>
<td>1.79</td>
</tr>
<tr>
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<td>1.98</td>
<td>1.73</td>
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<td>1.79</td>
</tr>
<tr>
<td>Overall mean</td>
<td>1.59</td>
<td>1.94</td>
<td>1.73</td>
<td>1.69</td>
<td>1.78</td>
<td>1.84</td>
</tr>
<tr>
<td>A/BC gaps-colleagues</td>
<td>Practical support from my colleagues to engage in CE/PD</td>
<td>Not at all true</td>
<td>1.65</td>
<td>1.75</td>
<td>1.73</td>
<td>1.92</td>
</tr>
<tr>
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<td>1.74</td>
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<td>1.77</td>
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<td>Overall mean</td>
<td>1.59</td>
<td>1.94</td>
<td>1.74</td>
<td>1.70</td>
<td>1.78</td>
<td>1.84</td>
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</table>
Heatmap 21: Museums — Perceived professional development support by competency area

<table>
<thead>
<tr>
<th>Lower scores are better</th>
<th>Adequate level of funding/financial support for me to engage in CE/PD</th>
<th>Adequate level of staff coverage for me to engage in CE/PD</th>
<th>Adequate level of CE/PD resources available</th>
<th>A general expectation that everyone engage in CE/PD</th>
<th>Practical support from my supervisors or leadership to engage in CE/PD</th>
<th>Practical support from my colleagues to engage in CE/PD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all true</td>
<td>1.49 1.93 1.76 1.66 1.68</td>
<td>1.49 1.90 1.85 1.62 1.73</td>
<td>1.54 1.94 1.74 1.60 1.68</td>
<td>1.49 1.92 1.68 1.69 1.62</td>
<td>1.49 1.91 1.71 1.63 1.67</td>
<td>1.48 1.90 1.71 1.63 1.66</td>
</tr>
<tr>
<td>Rarely true</td>
<td>1.49 1.90 1.85 1.62 1.73</td>
<td>1.49 1.94 1.74 1.60 1.68</td>
<td>1.54 1.94 1.74 1.60 1.68</td>
<td>1.49 1.92 1.68 1.69 1.62</td>
<td>1.49 1.91 1.71 1.63 1.67</td>
<td>1.48 1.90 1.71 1.63 1.66</td>
</tr>
<tr>
<td>Somewhat true</td>
<td>1.54 1.94 1.74 1.60 1.68</td>
<td>1.54 1.94 1.74 1.60 1.68</td>
<td>1.54 1.94 1.74 1.60 1.68</td>
<td>1.49 1.92 1.68 1.69 1.62</td>
<td>1.49 1.91 1.71 1.63 1.67</td>
<td>1.48 1.90 1.71 1.63 1.66</td>
</tr>
<tr>
<td>Completely true</td>
<td>1.48 1.90 1.71 1.63 1.66</td>
<td>1.48 1.90 1.71 1.63 1.66</td>
<td>1.48 1.90 1.71 1.63 1.66</td>
<td>1.48 1.90 1.71 1.63 1.66</td>
<td>1.48 1.90 1.71 1.63 1.66</td>
<td>1.48 1.90 1.71 1.63 1.66</td>
</tr>
<tr>
<td>Overall mean</td>
<td>1.48 1.90 1.71 1.63 1.66</td>
<td>1.48 1.90 1.71 1.63 1.66</td>
<td>1.48 1.90 1.71 1.63 1.66</td>
<td>1.48 1.90 1.71 1.63 1.66</td>
<td>1.48 1.90 1.71 1.63 1.66</td>
<td>1.48 1.90 1.71 1.63 1.66</td>
</tr>
</tbody>
</table>
Tableau dashboard user guide
Authors: Nathan Brown, Jessica Aurelia Carr, TrueBearing Consulting
Co-Editors: Amanda Focke, Eric Pourchot, Laurie Sather
Initial Release 6 July 2016

Quick start guide to Tableau Public tools

Data visualization dashboards extend the potential insight for users far beyond that of static graphics. This brief guide identifies the basic toolset with which a user can “drill down,” asking questions and discovering important underlying patterns in the data.

Grey panels at the top are “storypoints” that collectively tell a story. Click on each storypoint, one at a time, to see the dashboard of related data.

Right side of dashboards contain explanatory legends, and interactive filters. Click to focus all graphics on the screen to a desired view.

+ and - buttons change map size. Home button returns to original location.

Click the carat to reveal tools to focus, and move the map, and to select points of interest.
Click-select on map or chart to narrow the focus to a desired subset. Map acts as a dashboard-level filter, and other charts will reflect geographic selection.
For more information about Tableau data visualization dashboards and built-in tools for data exploration, go to: