

# Mapping the Landscapes Focus Group Final Report

## Final Version from Tom Clareson, 7/25/16

### 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 not-for-profit Educopia 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, and described 142 training sessions 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 not-for-profit 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. Laurie 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.

<u>Session</u>	<u>Number Confirmed</u>	<u>Number Attending</u>
----------------	-------------------------	-------------------------

SAA	20	12
AASLH	12	9
ALA MW	11	8
AAM	16	10
VFG 1	9	6
VFG 2	20	16

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.

- Libraries: 23 (including one library school representative)
- Archives: 14
- Museums: 12
- Historical Societies: 12

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.

**Society of American Archivists (12 participants):**

- College and University Archives (4)
- Corporate Archives (1)
- Government Archives (0)
- Religious Archives (0)
- Special Collections (3)
- Museums (2)
- Historical Societies (1)
- Other Categories
  - Public Libraries/Archives (1)
  - Technology (1)
  - Digital Asset Management (1)

**American Association for State and Local History (9 participants):**

- Corporate History (3)
- Court and Legal History (2)
- State Field Alliances (6)
- Small Museums (5)
- Religious History (2)
- Historic Houses and Sites (5)
- Military History (0)
- Women's History (3)
- Other Categories
  - Special Libraries (2)
  - Government Agencies (5)
  - Archives (5)
  - Native American Program (2)
  - Historic Preservation Organization (2)
  - Heritage Tourism Organization (2)
  - National History Day (1)

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

**American Library Association (8 participants):**

- Academic Libraries (5)
- Public Libraries (1)

- School Libraries (1)
- Other Categories
  - Library Consortium/Special Library (1)

**American Alliance of Museums (10 participants):**

- Art Museum/Center (1)
- History Museum/Historical Society (4)
- Historic House/Site (1)
- Specialized Museums (4)

**Virtual Focus Group #1 (6 participants):**

- 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)

**Virtual Focus Group #2 (16 participants):**

- 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)

In general, the categorization of participants into the subfields/membership subcategories which 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 LYRASIL 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 are contained in the appendices attached to this report.

- The raw notes from each session appear as Appendices A-1 to A-6.
- The top line narrative reports are Appendices B-1 through B-6.
- A "master" Discussion Guide for the focus groups – the list of questions asked, including prompts – is Appendix C.
- Additionally, a description of the methods used to set up and manage each focus group appears in Appendix D.
- Finally, the original Methodology Statement for the project, which includes additional background on the study and the methodologies used, is attached as Appendix E.

## **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) Focus Group, August 20, 2015**

The twelve 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; LYRASIL, 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 twelve 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) 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 3-5 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 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).

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

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 which 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 3-5 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 on 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 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.

- Society of American Archivists (24 responses)
- American Alliance of Museums (including EDCOM) (15)
- American Library Association (13)
- American Association for State and Local History (11)
- LYRASIS (7)
- Connecting to Collections Online Community (6)

### **Course Topics – Current**

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

- SAA Digital Archives Specialist curriculum (7)
- Copyright (5)
- Disaster Preparedness/Planning (4)
- Digital Preservation (4)
- Leadership (4)

### **Course Topics – Future**

When the discussion turned to topics that the focus group participants would like to take in the next 3-5 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.

- Grant Writing (11)
- Advocacy (7)
- Leadership (3)
- Digital Preservation (3)
- Copyright (2)

### **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.

- Technical Skills (9)
- Advocacy (8)
- People Management (4)
- Digitization/Digital Project Management (4)
- Budgeting (3)

## **CE/PD Selection Factors**

Discussions in each of the six focus group sessions on the factors that lead participants to select specific CE/PD 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:

- Price/Cost (38)
- Geographical/Physical Location (24)
- Timing of Session (19)
- Length of Time/Duration/Time Commitment (14)
- Topic (10)
- Need (7)
- Provider/Sponsoring Organization (7)
- Interest/Priorities of Trainee (7)
- Delivery Mode/Format (4)

## **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 participants 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 3-5 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:

- Grant Writing and Fundraising (3)
- Exhibits (3)
- Cross-cultural Heritage Collaboration (3)
- Digital Preservation (2)
- Digital Humanities (2)
- Copyright (2)
- Metadata (2)

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 RESULTS**

Another component of the “Mapping the Landscapes” was a Continuing Education/Professional Development Needs Assessment Survey conducted by TrueBearing Consulting during 2015-16.

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 which 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.
- **Satisfying interest of Coalition members, 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.

**APPENDIX A-1**  
**Mapping the Landscapes**  
**Focus Group**  
**Raw Notes**  
**SAA Conference Session: August 20, 2015**

- Introductions, Purpose of Focus Group Session, Process Agreement, Methodology
- 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 university archives; one said this and historical societies; counted in both categories)
  - Museums (2)
  - Historical societies (1) (one said this category and special collections)
  - Other affiliations
    - Public libraries/archives (1)
    - Technology (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.*

1. What organizations do you utilize for archival education continuing education/professional development (CE/PD) opportunities? (Note: Those responses shown without numbers received one response each.)
  - Society of American Archivists (SAA) (10)
  - LYRASIS (and previously, SOLINET) (5)
  - Mid-Atlantic Regional Archives Conference (MARAC) (4)
  - American Library Association (ALA) (4)

- OCLC Online Computer Library Center Inc. Webinars (2)
- Metropolitan New York Library Council (METRO)
- Archivists Round Table of Metropolitan New York, Inc.
- New Jersey State Library (NJSL)
- New Jersey Library Association (NJLA)
- American Library Association, Reference and User Services Association (ALA/RUSA)
- American Library Association, Library Information Technology Association (ALA/LITA)
- Society of Georgia Archivists (SGA)
- Digital Asset Management (DAM) Foundation
- New England Archivists
- Museum Computer Network (MCN)
- American Society for Theatre Research (ASTR)
- American Society for State and Local History – (AASLH)
- DigCCurr/University of North Carolina
- Archivists of Central Texas
- Society of Southwest Archivists (SSA)
- Texas Library Association (TLA)
- MOOC – Coursera
- MOOC – EDEX
- MOOC – EVDAM
- ARMA
- Midwest Archives Conference (MAC)
- Connecting to Collections Webinars
- Conservation Center for Art & Historic Artifacts (CCAHA)
- Smithsonian Institution
- Academic Library Association of Ohio (ALAO)
- Maryland Digital Library
- American Historical Association (AHA)
- Organization of American Historians (OAH)
- Capital District Library Council, NY (CDLC)
- New York Heritage
- Northeast Document Conservation Center (NEDCC)
- Mississippi Library Leadership Institute
- Association of College and Research Libraries (ACRL), Rare Books and Manuscripts Section (RBMS)
- Cleveland Archival Roundtable

- Cleveland Digitization Consortia
- Society of Ohio Archivists (SOA)
- Archive-It

2. What types of archival CE/PD course topics have you taken in the past year? (Note: Those responses shown without numbers received one response each.)

- ArchivesSpace (3)
- SAA Digital Archives Specialist Curriculum (3)
- Copyright (3)
- Rare Books training (2)
- Advocacy training (2)
- Encoded Archival Description (EAD) training (2)
- Archive-It
- Project management (SAA)
- Advanced project management (SAA)
- Digital humanities
- Archives and library management Issues
- Digital Public Library of America (DPLA ) Application Programming Interface (API) training
- Omeka training
- Student embedded research
- Ruby on Rails
- Search Engine Optimization (SEO)
- Grant writing
- Audio preservation
- Digital preservation
- Python programming
- Digital forensics
- Name authority training
- Digital asset management training
- Writing for librarians
- General technical training

3. What kinds of archival education CE/PD would you like to take in the next 1-3 years? (Note: Those responses shown without numbers received one response each.)

- Working with born-digital materials (4)
- Advocacy (4)
- User experience (3)
- Digital forensics (3)
- Working with video recordings (3)
- ArchivesSpace (2)
- Omeka training (2)
- Copyright (2)
- Strategic planning (2 - one for ArchivesSpace workflow, one for a smaller repository)
- Change management
- Contract management certification (state-based)
- Principles of archival description
- PHP (for Omeka, CMS)
- Ruby on Rails
- Museum and archival intersection training
- Automated description and classification of electronic records
- Technical issue training
- Encoded Archival Description (EAD) training
- Programs for students and the public
- Identification and care of photographs
- Archives and library management
- Arrangement and description
- Digital preservation
- Rare Book School
- Digital humanities
- Community partnerships
- Outreach
- Electronic records (assessment and retention)
- Library assessment
- Assessment (general)
- Reference (variety of classes needed)
- Google platform
- Digitization
- Management of students and volunteers
- Non-Profit management program

4. What skills do you hope to develop through CE/PD opportunities? (Note: Those responses shown without numbers received one response each.)

- Technical skills (5)
- Strategic planning (to move concepts forward and advocate for them) (3)
- People management (general) (3)
- How to be ethically persuasive (2)
- Advocacy/external leadership (2)
- Different tools (how to adopt them)
- Program in archival and collections interactive exhibits/museum studies
- Business management (administration and budgets)
- Leadership
- Engage students better
- Digital humanities (adapt ideas from others and engage faculty better)
- Project management
- People skills and people management (working with different constituents and stakeholders)
- Managing electronic records
- “Managing Up” (working with directors and boards of organizations)
- Community organizing (for the archival community and electronic records community)
- Additional information given during 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

5. What factors lead you to select specific CE/PD opportunities? (Note: Those responses shown without numbers received one response each.)

- Price (6) (many respondent tied this to location/delivery/schedule issues)
- Geographic/physical location for in-person classes (example: Chicago) (6)
- 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)
- Does the Academy of Certified Archivists accept the course or not?
- Free webinar vs. in-person commitment
- Will it help me talk to peers?
- Will it make me more marketable (CV/next job?)
- Skills learned
- How engaging the course is (synchronous vs. asynchronous)
- Format (web vs. in-person)
- Does this apply to my current job?
- “I feel like I have taken courses on everything. Is this information new?”
- Additional information given during group discussion at end of this question:
  - All participants regularly read about professional topics
  - What do they read?
    1. Technical Journals
    2. Newsletters from Sections (visual materials; museum archives)
    3. Book reviews
    4. Twitter (archival thought leaders are there)
    5. There is too much to read daily to manage reading in print materials.
    6. Workshops may be too dense with information.
    7. In answer to the probe question “Do you or your organization pay for CE/PD?” six participants said their organization paid, and four said they paid (these were mostly archival consultants, covering their own CE/PD costs).

6. What skills do you wish to gain to remain on top of the developments in your field?

- The group felt they mostly answered this in question four.
- Additional suggestions included:
  - New instruction and student engagement methods
  - Community outreach skills
  - Trends in digital humanities

7. Have you or your organization worked on collaborative projects across cultural heritage sectors (with museums, libraries, historical societies)?

- Eleven of 12 participants said they have worked on cross-sector collaborative projects.



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?

- 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 non-profit/cultural heritage arena.
- Comments related to this question:
  - We can learn “storytelling” from museums.
  - One participant attends training offered by history organizations.
  - Many topics are interchangeable between LAM types and will probably coalesce in the future.
  - 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 mentioned).
  - There was a feeling that the fields 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.
  - All cultural heritage sectors are interested in descriptive practices and standards.
  - Archivist vs. curator is an artificial distinction to the user.
  - DPLA: All sectors’ digital materials show up in DPLA, but there are not yet descriptive best practices across the whole field.
  - 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 – IS IT?
  - Arrangement and description: Is digital curation cherry picking? There’s a need to protect basic archival principles.
  - 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.
  - Archivists are trying to protect their collections, not be non-collaborative.

- There was difficulty in the past when SAA tried certification in specific areas of the field. Should there be educational standards in the future?
- Is cross-sector work becoming easier because of the generational shift in archives workers?
- 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.
- Cross-sector training can help in acculturation.

9. Have you taken cross-sector training in the past 3-5 years?

- Topics taken included:
  - Digital preservation and conservation
  - Digital asset management
  - Computer science
  - Appraisal (looking beyond the field/scientific approach)
  - 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 the archival field.

10. 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 (The National Digital Newspaper Project was 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 non-profit 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

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

- One participant answered that this type of training applies directly to the expectations put on a university library.
- *Time did not allow for further discussion.*

12. What else would you like to add about archival CE/PD issues?

- *Time did not allow for discussion of this question.*

**APPENDIX A-2**  
**Mapping the Landscapes**  
**Focus Group**  
**Raw Notes**  
**AASLH Conference Session: September 17, 2015**

- Introductions, Purpose of Focus Group Session, Process Agreement, Methodology
- 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)

- o Native American program (2)
- o Historic preservation organization (2)
- o Heritage tourism organization (2)
- o 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.*

1. 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 assoc.)
- Ohio Local History Alliance (OLHA)
- Indiana Historical Society
- Association of Midwest Museums
- University of Texas at Austin
- Kentucky Department of Libraries
- Kentucky Library Association
- LYRASIS
- Midwest Archives Association
- Society of Indiana Archivists
- Indiana Landmarks
- Conservation Center for Art and Historic Artifacts
- Campbell Center
- American Institute for Conservation
- Field Services Alliance

- Verka Associates
- Visit Indy
- Pacific Northwest Historian's Guild
- Women's History Trail
- Texas Historical Commission
- University of British Columbia

2. 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 (9)
- Project management (3)
- Copyright (including digital image use) (2)
- Deaccessioning and collections management topics (2)
- Human resources (2)
- Section 106 training
- Collections-based legal issues
- Teaching with primary sources
- Software training (e.g., Excel)
- Object-focused training (C2C webinars)
- Setting up/starting an archive
- Interpretive writing
- Customer service
- Readers advisory
- Tech showcase
- Electronic records
- Leadership forum (CEO forum)
- Volunteer/project management
- Heritage tourism
- Docent training
- Rental event training
- "Super Service" (offered by Super Bowl)
- Museum and school partnerships
- Social media
- Grant writing
- Grant management
- Private fundraising
- Emergency planning

- Contract management
- Museum computer network training
- Historic home management
- Museum management
- Oral history training
- Workman's compensation tutorials
- Software development
- In-house communication
- Film format identification
- Structural safety for earthquakes

3. What kinds of CE/PD would you like to take in the next 1-3 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
- How to do history in volunteer organizations (relevance/outreach facilitation)
- Which repositories to send folks to/how do we connect with other repositories
- How to collaborate within the region and be relevant to many institutions/project-based regional collections
- History relevance campaign
- Social media (how does it apply to my organization)
- How does social media relate to marketing and how to stay current
- Who do I need on my team (technology)
- I.T. (and its role in an organization's success)
- Technology (understanding cutting edge and how to describe)
- Infrastructure (and how that drives the industry)
- How to talk with/communicate with I.T. (how to speak the language)
- Digital preservation/business continuity planning/disaster planning (for tech)

- Mid-level professional development/middle management
  - (Free for certain topics is better)
  - How to collaborate
  - What's the newest hot topic in our field – NOW!
  - Pop-up museums
  - Sensitivity training
  - How to collaborate with special communities of interest
  - Basic finance education 101
  - Developing compelling public programs and evaluation
  - Communication styles
  - How to talk cross-departmentally
  - Learning styles
4. What skills do you hope to develop through CE/PD opportunities? (Note: Those responses shown without numbers received one response each.)
- Digitization
  - Cemetery preservation
  - How to talk to administration/advocate for your own expertise and get them to listen and respect
  - Being able to sell what you do/how to write a bio etc.
  - Public presentation skills (how to engage your profession)
  - Gender awareness, especially as it relates to skills development
  - Women advocating for themselves professionally
  - Exhibit development in-house.
  - Digital design for all professionals
5. What factors lead you to select specific CE/PD opportunities? (Note: Those responses shown without numbers received one response each.)
- Cost (6)
  - 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
  - Local vs. out-of-state
  - Instructor
  - Time of year
  - Topic and anonymity
  - During work hours
  - Level of interactivity (if not, they will read)
6. 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.
7. 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.
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 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
9. Have you taken cross-sector training in the past 3-5 years?
- No participants said they had taken cross-cultural heritage training.
10. 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)

11. 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.

12. 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.

**APPENDIX A-3**  
**Mapping the Landscapes**  
**Focus Group**  
**Raw Notes**

**ALA Midwinter Conference Session: January 8, 2016**

- Introductions, Purpose of Focus Group Session, Process Agreement, Methodology
- 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.*

1. 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
- The Humanities and Technology Camp (THAT Camp)
- Code Academy
- Harvard Extension
- Harvard Leadership Program
- UCLA Leadership Program
- Rosetta Stone
- Frye Institute
- Boston Language Institute
- The Scholarly Publishing and Academic Resources Coalition (SPARC)
- Bureau of Educational Research and Development
- Northeast Florida Library Information Network
- Consortium of Academic and Research Libraries in Illinois (CARLI)
- Memphis Area Library Association
- Go-to-Webinar
- American Society for Indexing
- Tennessee Library Association
- Connecticut Library Association

- Illinois Library Association
- Reaching Across Illinois Library System (RAILS)
- Society of American Archivists (SAA)
- National Information Standards Organization (NISO)
- Center for Research Libraries
- Connecticut Association of School Libraries (CASL)
- Institute of the National Research Council of Italy (ISTI-CNR)

2. What types of CE/PD course topics have you taken in the past year? (NOTE: No topics had more than one response.)

- 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

3. What kinds of CE/PD would you like to take in the next 1-3 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
- Time management
- Managing ILS migrations
- Rare Book School
- Collaboration
- E-book publication formats
- Self-publishing
- Metadata
- Linked data
- Strategic planning
- Team building
- Management for introverts
- Resource management
- Database development
- Excel
- Active team membership
- Assessment
- Data driven decision making
- Data-oriented scholarship/statistical interpretation
- Interlibrary loan
- Illiad
- Business planning
- Outcomes
- WordPress

4. 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
  - Time management (week-long management; for department)
5. What factors lead you to select specific CE/PD opportunities? (Note: Those responses shown without numbers received one response each.)
- Cost (6) (comments on “per person vs. flat fee”)
  - Location (6)
  - Topic (5)
  - Timing (5)
  - Presenter (4)
  - Sponsor (3)
  - 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
6. 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.
7. 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

- 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

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?

- Advantages:
  - Establish personal relationships
  - Schools of Library and Information Science as potential partners
  - Many wanted to learn about other types of organizations:
    1. Museums 101 for librarians (8)
    2. Archives 101 for librarians (6)
    3. 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

9. Have you taken cross-sector training in the past 3-5 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?

10. 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
- IT management

- Moving collections
- Digital humanities research
- Ethnographic research (understanding user experiences)
- Cataloging non-traditional items (example: rocks)
- 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.
- Cross-cultural sensitivities
- Metadata
- Copyright for digitization
- Ways to market what we do
- Exhibits with tablets (to submit comments/surveys/harvest contact information to be able to do targeted outreach later)

11. 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.

12. 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.

**APPENDIX A-4**  
**Mapping the Landscapes**  
**Focus Group**



## Raw Notes

### AAM Conference Session: May 26, 2016

- Introductions, Purpose of Focus Group Session, Process Agreement, Methodology
- 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)
- 1. 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
  - New York Chapter of Society of American Archivists
  - Johns Hopkins University Continuing Education
  - Leadership Experience and Development Conference
  - Association of Science –Technology Centers
  - Southeast Museums Conference (SEMC)
  - Mid Atlantic Association of Museums (MAAM)
  - Lynda.Com
  - Student and Youth Travel Association
  - American Bus Association
  - Association of Fundraising Professionals
  - Nonprofit Center for Excellence
  - Webinars offered by consultants on fundraising
  - Internal institutional sessions on project management, safety

2. 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
- Social media
- Board issues
- Curriculum development (Common Core)
- Disaster planning
- Legal (copyright, NAGPRA, safety issues)
- Dialog and idea-Sharing (particularly on controversial issues)

3. What kinds of CE/PD would you like to take in the next 1-3 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
- Communications
- Organizational strategic planning
- Succession
- Human resources for the small organization
- Staff management
- Accessibility

- Psychology and neuroscience
- Impact (measuring and articulating)
- Arbitration
- Working with a small staff
- Budgets
- Informal learning (how people learn)
- Surveying (better evaluation techniques)
- Social media
- Editing
- Lifelong learning
- Distance learning

4. 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
- Social media
- Cross-pollination
- Writing
- Learning about people who go to museums and those who don't
- Distance learning (conducting, improving)
- Managing millennials
- Standing up for yourself
- Saying "no"
- Working with women who are leaders in the for-profit world

5. 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
- Who else might be there/fellowship
- Mentoring offered
- Personal enrichment
- Social exchange
- Will it be useful to my work team?
- How the training is labeled (not allowed to attend some types of CE/PD)
- Membership
- Accessibility online
- Part of a series/continuing offering

6. 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.

7. 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:
  - Working with performing arts and cultural heritage groups (3)
  - Museum working with library on an event (2)
  - Museum utilizing those from other sectors on committees
  - 
  - Seeing funded projects through work with IMLS
  - Focus group participant work with museums (helping facilitate cross-sector collaboration)
  - Common missions around an issue
  - Museum access issues (programs, collaborative training)
  - Events with non-profits in the area (Dog Days of Summer)
  - Working with local sites, national parks, school boards
  - Collaborating with others as a Twitter moderator

8. 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:
  - Work around common issues such as race, incarceration
  - Can consider necessary skills; look at risks, strengths, philosophies
  - Reaching out to other cultural heritage types (2)
  - 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).

9. Have you taken cross-sector training in the past 3-5 years?

- Six participants said they had taken cross-sector training in the recent past.

10. 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?
- 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

11. 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.

12. 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.

**APPENDIX A-5**  
**Mapping the Landscapes**  
**Focus Group**  
**Raw Notes**

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

- Session Introduction, Purpose of Focus Group Session, Process Agreement, Participant Introductions
  
- Which of these groups do you most closely identify yourself or your organization with? (NOTE: This session had six participants.)
  - 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)
  
- 1. 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

2. 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

3. What kinds of CE/PD would you like to take in the next 1-3 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

4. 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."

5. 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.

6. 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

7. 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.

8. Have you taken cross-sector training in the past 3-5 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

9. 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

10. 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:
  - 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.
  - “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.”

11. 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.

**APPENDIX A-6**  
**Mapping the Landscapes**  
**Focus Group**  
**Raw Notes**

**Virtual Focus Group Session 2: February 25, 2016**

- Session Introduction, Purpose of Focus Group Session, Process Agreement, Participant Introductions
- 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)
1. 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)

2. 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
3. What kinds of CE/PD would you like to take in the next 1-3 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.

4. 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

5. 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).”

6. 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)

7. 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

8. Have you taken cross-sector training in the past 1-5 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.”

9. 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”

10. 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:
  - “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.”

11. 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/programs

**Appendix B-1**  
**Mapping the Landscapes**  
**Focus Group**  
**Top Line Report**  
**SAA Conference Session: August 20, 2015**

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 12 participants in the session categorized themselves as:

- College and university archives (4) (one participant also said special collections; they are 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)
  - technology (1)
  - digital Asset management (1)

The focus group consultants will take extra care in promoting the virtual focus groups - to be held in 2016 - 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 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)
- LYRISIS (and previously, SOLINET) (5)
- Mid-Atlantic Regional Archives Conference (MARAC) (4)
- American Library Association (ALA) (4) (includes 2 from ALA Divisions like RBMS and 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 1-3 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 ethically 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

### CE/PD 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 participants, everyone 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 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), 11 of 12 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 20 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, which can leave you stuck in your profession. “A skill should be transferable (across cultural heritage institution type), but IS IT?”

- Finances drive cross-sector work. We collaborate because money limits the resources LAMS have.
- “We can’t have three systems” across libraries, archives, and museums; and then 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:
  - “Is cross-sector work becoming easier because of the generational shift in archives workers?”
  - 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.
  - 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 non-profit/cultural heritage arena.

A number of the focus group participants had taken cross-sector training in the past 3-5 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 non-transferrable; 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 13 suggestions. While most centered on topics such as digital preservation, how to institutionalize cross-cultural collaboration, digital humanities, and audience engagement and instruction tips, there were some interesting topics that 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 included 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 which 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.

## **Appendix B-2 Mapping the Landscapes Focus Group Top Line Report AASLH Conference Session: September 17, 2015**

### 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 nine people participated in the focus group. As with the Society of American Archivists (SAA) 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's 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:

- Corporate history (3)
- Court and legal history (2)
- State Field Alliances (6)
- Small museums (5)
- Religious history (2)
- Historic houses and sites (5)
- Military history (0)
- Women's history (3)
- Other categories
  - Special libraries (2)
  - Government agencies (5)
  - Archives (5)
  - Native American program (2)
  - Historic preservation organization (2)
  - Heritage tourism organization (2)
  - 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 four participants who had taken copyright or legal issues workshops. Additionally, through content analysis, three 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 CE/PD, the focus group participants would like to take in the next 1-3 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 further content analysis of the raw data from this question, the answers from five 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 grant 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 highest level of interest 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 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
- Cemetery preservation
- How to talk to administration/advocate for your own expertise and get them to listen and respect
- Being able to sell what you do/how to write a bio etc.
- Public presentation skills – how to engage your profession
- Gender awareness, especially as it relates to skills development
- Women advocating for themselves professionally

- Exhibit development in-house
- Digital design for all professionals

### CE/PD Selection Factors

Discussion on the factors that lead participants to select specific CE/PD opportunities brought forth the 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 nine 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 nine 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 3-5 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 (i.e. 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 -- AASLH

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 members 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, which 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 in selection.

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.

## **APPENDIX B-3 Mapping the Landscapes Focus Group Top Line Report**

## **ALA Midwinter Conference Session: January 8, 2016**

### Background and Demographics

Tom Clareson and Laurie Gemmill Arp of LYRASIS, consultants on the Mapping the Landscapes Focus Group project, 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 eight 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 proved 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 categories
  - Library consortium/special library (1)

Due to a lack of representation here from school and special library groups, the consultants are promoting the virtual focus groups (to be held in January and February of 2016) to those populations in particular 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 1-3 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 dleanup (1)
- Time management (week-long management; for department) (1)

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

### CE/PD Selection Factors

Discussion on the factors that lead participants to select specific CE/PD opportunities elicited 12 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 multiple participants mentioned many of the “standard” answers to survey and focus group questions on why certain workshops are selected, both the presenter of the sessions, and the sponsoring organization for the sessions, were 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 a 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, which included:

- 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, including:

- 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 3-5 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 13 suggestions, tying the SAA focus group for most responses. There were some interesting topics that the group suggested, and some of the ideas were very detailed. No item in this list had more than one response.

- Providing reference services across institution types
- Electronic records
- IT management
- Moving collections
- Digital humanities research
- Ethnographic research (understanding user experiences)
- Cataloging non-traditional items (example: rocks)
- 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). Participants wanted to use these methods to leverage work done (this was suggested by one participant but was popular with all in the group).
- Cross-cultural sensitivities
- Metadata
- Copyright for digitization
- Ways to market what we do
- 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 also to 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.

**APPENDIX B-4**  
**Mapping the Landscapes**  
**Focus Group**  
**Top Line Report**  
**AAM Annual Conference Session: May 26, 2016**

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, D.C. 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 10 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)
- 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 travelling.

### Course Topics – Current and Future

When asked what types of museum 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 1-3 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 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 wished to gain in order to remain on top of the developments in their field, the group referred back to this list of skills.

### CE/PD 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 multiple participants mentioned many of the “standard” answers to focus group questions on why certain workshops are selected, 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. Many responses were 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 non-profits in the area (Dog Days of Summer)
- Working with local sites, national parks, school boards
- Collaborating with others as a 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 (2)
  - 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 3-5 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, and 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 from this Focus Group Session

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”). Challenges included the levels of expectations, financial resources, and commitment that 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.

**APPENDIX B-5**  
**Mapping the Landscapes**  
**Focus Group**  
**Top Line Report**  
**Virtual Focus Group Session #1: January 26, 2016**

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 rrchives/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.

### CE/PD 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
- Departmental long range plan

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.

**APPENDIX B-6**  
**Mapping the Landscapes**  
**Focus Group**  
**Top Line Report**  
**Virtual Focus Group Session #2: February 25, 2016**

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

### CE/PD 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.

## **APPENDIX C**

### **Mapping the Landscapes**

### **Focus Group Moderator's Discussion Guide**

### **Master Version**

#### **Begin the session**

- 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?)*

**APPENDIX D**  
**Mapping the Landscapes**  
**Focus Group Moderator's Setup Guide**  
**Master Version**

**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](mailto: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:
  - 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.
  - 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

- 3-7 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.

## 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.

### **Refreshments**

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

## **APPENDIX E**

### **MEMORANDUM**

**DATE:** August 6, 2015

**TO:** Mapping the Landscapes Focus Group Task Force; Katherine Skinner; Christina Drummond

**FROM:** Tom Clareson, Senior Consultant for Digital & Preservation Services, and Laurie Gemmill Arp, Director, Digital & Preservation Services, LYRASIS

**SUBJECT:** Focus Group Methodology Statement for Mapping the Landscapes Project

We are pleased to have been selected as the consultants for the Mapping the Landscapes Focus Group project. Our work in publicizing the event and receiving registrations for the Society of American Archivists’ session on August 20th has already begun. We have received overwhelming interest and we are working to finalize the attendee list. We also have a long waitlist of people interested in case scheduled attendees need to cancel. If those on the waitlist are not able to participate, they will be invited to the virtual sessions. We are also developing the questions for the focus group discussion guide, and wanted to detail the methodology for our work on the project.

The consultants are working with the Project Manager and Focus Group Task Force members to invite participants. We are working with the management and membership of the organizations whose members we plan to involve in the in-person focus groups. We plan to let them know about the online focus group opportunities closer to the time those sessions are held, so they can advertise them to their members.

Our goal for the focus groups is to reach practitioners in each field. We will work with graduate school faculty and professional education providers to keep them updated on the project, but will attempt to avoid having these resource people participate in the focus groups in case they would steer or bias the conversation.

In collaboration with the Mapping the Landscapes Focus Group Task Force, the consultants are preparing focus group discussion guides (facilitation/moderator scripts) tailored to specific participant audiences as necessary. The documentation will include the introductory information for each session, the common questions to be used between all of the focus groups, and specific questions to be used with the library, archives, and museum audiences.

The consultants plan to use a semi-structured focus group moderation approach, with scripted key questions to define the topics to be discussed, but allow the opportunity for the session leaders and/or participants to change order of discussion or add follow-up probe questions as discussion flows. The consultants have found this to be the most flexible way to run sessions, and it gathers a greater amount of useful information than structured or unstructured groups.

Our plan for development of the focus group discussion guides includes providing a series of questions that will be asked at all four conferences (SAA, ALA Midwinter, AAM, and AASLH), if we determine that works with the larger methodology. In addition to these baseline questions, we will also develop approximately 25% of the discussion guide questions to apply specifically to the primary type of institution that will be represented at each of the conferences (archives, historical societies, museums, and libraries). In our reporting, we will be able to report in the aggregate on the baseline questions, and analyze and compare responses to the institution-type specific questions. We believe this approach will provide the richest set of information about the needs of each group. Throughout the project, we will work closely with the Focus Group Task Force in the development of the discussion guides to ensure we have expert input on how to address specific gaps.

We will have the two consultants in each in-person and virtual session, one leading and one supporting and documenting the sessions. The recording of focus group comments will be done on flipcharts, and then the information will be input in Word and/or Excel format and content-analyzed by the consultants for grouping of information and ease of reporting across the multiple groups. Before each session, we discuss a “participant agreement” with the focus group members to set expectations for confidentiality, ease of recording conversations, etc.

Following each session, both raw data from the sessions and a synthesis of findings will be delivered to the Project Manager and the Mapping the Landscapes Focus Group Task Force. After the first focus group session, the consultants will provide a list of content-analysis groupings of themes from the



conversations, which will be revised and updated throughout the project to show any longitudinal appearance of topics and themes.

Additionally, the consultants will configure, moderate, and document two virtual focus groups. With the virtual focus groups, which will consist of participants from many types of cultural heritage institutions, the consultants will develop specific discussion guides to ensure that participants from all institutional types understand the terminology and context of the questions.

LYRASIS uses Adobe Connect for online training and meetings throughout the year. The consultants are very familiar with this tool and will use it for the virtual focus groups. The sessions will be scheduled in advance. The system allows voice and textual interaction, and also supports whiteboards or sharing of slides or other documents. There are no additional costs associated with using this tool. We can record the sessions and capture the text chat as pertinent.

Adobe Connect has recording capability, but in our experience with focus groups, recording the sessions can alter the nature of the conversation and how frank people are willing to be. We have that capability for the online sessions, and can further explore with project staff and task force members if we should utilize recording capabilities.

While top line reports on the focus groups will be completed after each group meeting, the final report of the project will include brief reports on each session, documentation of the commonality of themes and topics across the sessions, and information which the task force members and other Coalition members can use both in planning future continuing education/professional development activities and strategies, and to replicate the focus group work in the future, in order to determine longitudinal trends between these initial sessions and those scheduled in the future.