

Chapter 3 : Education of cataloguers

3.1 Introduction

Education and training of cataloguers are two related processes. Education takes place at a library school and lays the foundation on which training on-the-job takes place. The main focus of library schools is pre-service training (Van der Walt, 1997: 88). Specific job training is the chief responsibility of the employer. It starts when a cataloguer starts working (i.e. on-the-job training) and continues throughout the work life (continuous education). The success of training on-the-job is partly dependent on the education received by the trainee. As indicated by Gordon (1994: 2), the distinction between formal education and training is becoming blurred. More specific knowledge and skills are integrated into the curriculum. In the job situation, employees also sometimes need to engage in formal education to develop themselves to perform better.

Other factors like an interest in cataloguing and the length of time between graduating and starting to catalogue also influence the readiness of a cataloguer to begin cataloguing. The level of knowledge and skills possessed by library and information science graduates determines the kind of training employing libraries have to give.

Teaching is affected by the continuous changes taking place in library and information practice. Teachers, library and information practitioners and professional bodies have a long history of continuously engaging in discussions aimed at achieving the common goal of the best possible service to users.

3.2 Education of cataloguers

Education for the library and information profession is being offered by several universities and technikons in South Africa. Universities traditionally offered degrees in this field whilst technikons offered diplomas, basically for paraprofessionals. Technikons

have now introduced a B.Tech. degree in the library and information field. It is not yet clear as to whether the degrees offered by the two types of institutions are equivalent. Stillwell (1997: 209) states that it is not clear whether employing libraries will employ people with the technikon degrees as professionals. Some uncertainty exists among practitioners who qualified from universities as to whether they should be equated with their colleagues from technikons.

The emphasis in the training of technikons is on acquiring skills for specific jobs. Universities cover a wide scope of background theory (Raju & Brink, 1997). Both approaches are important in the design of a comprehensive curriculum since both theory and practice is essential for a balanced library and information professional education. The equivalence of the status of both the qualifications is not yet agreed upon (Stillwell, 1997: 209).

The education of library professionals is currently under debate (Stillwell, 1997: 207). Environmental changes affecting both teaching schools and libraries and change in higher education in South Africa necessitates change in education programmes and regulations. Library and Information Science education, training and qualifications, like all other fields, have to offer programmes that fit into the National Qualifications Framework (NQF) as set by South African Qualification Authority (SAQA) (Stillwell, 1997: 207).

The revision and adaptation of the curriculum will always be necessary in order to remain relevant and to produce marketable professionals. The historical links South Africa has, especially with the United Kingdom and the United States, have dominated the direction and general character of professional education in librarianship (Dick, 1998: 34). Not much has been published in South Africa about the education and training of cataloguers. The situation in the United Kingdom and the United States will be discussed as background to the South African situation.

3.2.1 Education of cataloguers in the United States of America and in the United Kingdom

There are important factors to note from cataloguing education and its development in the United States and the United Kingdom which relate to conditions in South Africa. Future developments in this country can also be predicted from developments in these two countries, such as:

- (a) Practitioners hold views that education does not meet the needs of cataloguing practice. Entry-level cataloguers are usually not sufficiently prepared for their first job (Jeng, 1997: 114 & Hill, 1988: 76).
- (b) In the United States and United Kingdom cataloguing is an optional course (Van der Walt, 1997: 96). Some library schools are omitting cataloguing from the core curriculum (Clark, 1993: 33 & Jeng, 1997: 114). The exaggerated emphasis on automation leads to elimination of cataloguing as a core subject in library and information studies (Clark, 1993: 33). This may imply decreased importance attached to cataloguing as a necessary foundation course for all library and information professionals. It is however felt by some that core parts are to be learned by all and elective areas for specialization (Gorman, 1992: 694).
- (c) Cataloguing curriculum needs redesigning. Course content and job requirements must correspond (Coutts, 1991: 10). Cataloguing course descriptions are generally vague (Sellberg, 1988: 37). Curriculum development is disorderly and unplanned. Curriculum varies from school to school and there is no agreement amongst the schools about the time devoted to cataloguing (Clark, 1993: 30 & Sellberg, 1988: 31).
- (d) There is still an imbalance between theory and practice in the teaching of cataloguing (Sellberg, 1988: 32).

- (e) Practitioners and educators are responsible for the prevailing situation in education (Gorman, 1992: 694) and their combined efforts can change the situation. There is need for increased cooperation between them towards cataloguer education and training. The two parties are also responsible for the improved image of cataloguing in library and information services (Clark, 1993: 30).

3.2.2 Education of cataloguers in South Africa

As stated by Coetzee (1995: 157), no reliable information exists in South Africa about what employers think about the quality of education in cataloguing of graduates from South African institutions involved in cataloguing work. General dissatisfaction was raised through discussions held with the employers by the former author.

Both cataloguing educators and practitioners are addressing the education and training needs of the profession. The revision of the Library and Information Science curricula was one of the topics debated at the SAILIS conference in September 1997. Educators have a part to play in both education and training but concentrate more on imparting background knowledge and principles (Jurow, 1992: 15), whilst employing libraries have to provide on-the-job training and create viable conditions for continuous training. Discussions should continue in order to find ways to work together to find solutions to the problems and the challenges facing cataloguers in the continuously changing working environment. At the SAILIS annual conference in 1997, working committees were suggested to look into this question and how it can be addressed. The need is realised but as yet nothing has been done.

Current LIS education is characterised by ambiguity, contradicting impulses, ongoing debate and uneven development (Dick, 1998: 52). The research by Coetzee (1995) on the status of cataloguing education in South Africa revealed different approaches by various institutions teaching cataloguing. Stillwell (1998: 7) and Coetzee (1995: 149)

support the idea of maintaining a core curriculum of which cataloguing should be part. Cataloguing can still be regarded as a core subject even in a cooperative environment (Van der Walt, 1997: 96). It offers the fundamental knowledge for all library services.

Practitioners in cataloguing in some South African university libraries have come to the conclusion that the cataloguing knowledge and skills of students have deteriorated. There appears to be a loss of interest in cataloguing. The situation can partly be blamed on education and affects cataloguing practice in general.

3.2.3 Reasons for the waning of interest in cataloguing as a profession

With the increased use of technology for cataloguing purposes, less original cataloguing needs to be done. The notion that cataloguing is slowly phasing out with an increase in copy cataloguing (Coetzee, 1995: 148) and the fact that paraprofessionals are doing some cataloguing duties (Intner & Hill, 1986: 41) has led to general loss of interest in this aspect of library work and thus less value has become attached to its study. This waning of interest is evident and can be attributed to several factors:

- (a) Phasing out of examinations on practical cataloguing. This suggests a decrease in the importance attached to acquiring this skill. Practical cataloguing is no longer a final examination subject any more in some library and information schools. Less time is also allocated to practical cataloguing during the study period. This can lead to a decrease in the level of practical skills acquired.
- (b) Insufficient time allocated to teaching and practical cataloguing. There is no standard for this at institutions offering cataloguing education (Coetzee, 1995: 152). Course duration should allow for enough time to be devoted to cataloguing theory to achieve an understanding of the fundamental importance of cataloguing in information provision (Van Brakel, 1990: 192). Romero (1996: 3) states that cataloguing is a course in which knowledge is based on techniques and skills and

would benefit from a balance between theory and practice. There is need for coordination between teaching of theory and practical work. The practicals and an internship done as part of professional qualification requirements are not sufficient. Students are usually assigned to clerical work during their practicals in libraries and they develop negative perceptions of cataloguing as a less challenging job (Nassimbeni, 1990: 157). The few days or weeks spent on cataloguing are not sufficient to ensure that skills have been mastered and an interest developed in cataloguing as a possible job.

- (c) Lack of interest and enthusiasm from students and cataloguing educators. Not all cataloguing educators are keen on the subject (Clark, 1993: 32). For various reasons work cannot be distributed according to “preferences” and educators who are not motivated towards cataloguing are assigned to teach it. Intner & Hill (1986: 41) also point out the practice in library school of encouraging deviation from cataloguing to other fields like online searching. Students are indoctrinated with negative preconceptions about cataloguing, passed on from their teachers. The diminishing interest is also sometimes the result of observation of cataloguing practices or the role models presented by cataloguers during their practicals (Intner & Hill, 1986: 55).
- (d) Poor cooperation between library educators and practitioners. Due to work pressure it is not always possible for practitioners to spend enough time to complement what has been taught in class by providing continuous assistance to new cataloguers. This deprives students of the opportunity to acquire more knowledge and skills for an actual job situation. This could be a good opportunity to dispel fears about the complexity of cataloguing and negative perceptions about the job.
- (e) Exaggerated priority given to technology and its implications. It was expected in the seventies that the introduction of technology would make cataloguers

redundant (Coetzee, 1995:156). It was also anticipated that cooperative catalogues would provide all bibliographic records for copy. This has not been the case anywhere in the world or in South African university libraries. Although a significant decrease in original cataloguing has been experienced, some libraries are still doing mostly original cataloguing although the situation is expected to change soon. Copy cataloguing is also still performed by professionals in most libraries.

A number of issues have to be addressed in the teaching of cataloguing in South African university library and information science schools. More will be expected in the future from new cataloguers with more responsibilities and an expanded range of tasks.

3.2.4 Possible changes needed in cataloguing education practices

Education has the responsibility to prepare students adequately for cataloguing jobs and also to create an interest in the job. Some possible solutions to the educational limitations are the following:

- (a) Design of the curriculum to reflect the current changes in cataloguing practice. There is increasing concern about the education for cataloguing and its ineffectiveness to respond to changes in the job (Buttlar & Du Mont, 1989: 5 & Romero, 1994: 211). Changes in cataloguing practice have brought with it the need for new knowledge and skills. Curricula vary from school to school. Education should however be grounded in solid theory and principles (Velluci, 1997: 4) to give students the background enabling them to think critically, to see the bigger picture, evaluate and make wise long-range decisions (Benaud, 1992: 87). Employers advertise predominantly for knowledge of basic cataloguing tools like AACR2, MARC21, DDC and LCSH for library and information jobs. It would be premature to abandon teaching them (Towsey, 1997: 79). South African library schools should maintain the teaching of these essential although traditional

subjects. It is important to teach the role of technology and other environmental factors in developing cataloguing theory (e.g. introduction of MARC). New subjects like programming systems, interpersonal skills and communication should be introduced (Steinhagen, 1997: 112).

A growing requirement has recently evolved, requiring that students be trained to be easily assimilated in cataloguing cooperatives and consortia. CALICO, a consortium of library and information centres around Cape Town, has indicated the need for students in librarianship to be trained for working in a sharing environment (Van der Walt, 1997: 88). This is highly necessary for students who will be doing cataloguing since cooperation in this field is vital. Standards are of great concern in a cooperative environment. A lack of standardization partly originates from the lack of adequate education in the application of bibliographic standards by tertiary institutions (both Universities and Technikons) (Coetzee, 1995:150).

- (b) Service orientation must be the main focus in teaching (Walbridge, 1991: 71). The interrelatedness of all library and information provision functions with user service should be emphasised in teaching. Attitudes should be built where the user is the important focus of all functions including cataloguing (Intner & Hill, 1986: 55). Cataloguing should be taught in a positive way, revealing its usefulness in the whole information provision process. Poor records lead to poor retrieval and thus failure in satisfying user needs.
- (c) Prioritising cataloguing knowledge and skills. Teaching of cataloguing should remain compulsory for every library and information worker as it is important for all professionals to have this background. The bibliographic record is the heart of all information provision work (Steinhagen & Maynahan, 1998: 5 & Walbridge, 1991: 62) and all libraries and information workers - whether they intend to take up cataloguing work or not - should have sufficient background knowledge of the structure of catalogues. Clark (1993: 33) and Jeng (1997: 79) indicate that some

library programmes in the United States do not require a course in cataloguing any more. Some South African programmes labelled as “information science” or “information studies” for example, also leave out cataloguing as a course. This practice promotes the attitude described by Buttlar & Garcha (1998: 319) where students do not want to take cataloguing because they claim not to see how it relates to the job they will be doing upon completion of the programme.

Cataloguing is a core competency and should be learned by all, with elective areas for specialization (Van Der Walt, 1997: 96 & Gorman, 1992: 694).

- (d) Balance between theory and practice. More time should be allocated for practical cataloguing as it is a skill mastered by practice and provides for the assimilation of practice and theory. Employment of students as assistants doing cataloguing is an effective tool that can help in the learning of the skill. Libraries should accept students for practical training as part of their normal, permanent activities.

- (e) More experienced cataloguers should participate in offering education. Henderson (1987:22) indicates the need for people to teach, who have enough experience. This will promote integration of theory and practice. Cataloguers should study to obtain further qualifications in order to offer education at graduate level (Clark, 1993 :33). Practitioners should be available to assist in cataloguing education whether full-time, part-time or as volunteers. They are in a better position to present both the classroom and real job situations. They also have experience of the changes and their implications on cataloguing practice. There is also the advantage that most of them might have developed a love for the job which they could pass on to the students. There is a need to increase interest in cataloguing. White (1987: 49) says the new breed of technical services professionals must take part in informing students that their preconceptions could be wrong.

3.4 Conclusion

Concerns are raised in the literature on the education and training of cataloguers. The two processes are very important in preparing for successful job performance but are presently not successful in this regard. It is necessary that educational institutions, employers and professional bodies cooperate in the education and training of cataloguers.

Education offers basic theoretical background information for library and information practice. Employers are then responsible for specific job situation training. The needs of the different job categories like new staff, experienced staff, copy cataloguers and original cataloguers, should be considered by employers, and training tailored specially to satisfy each one's special needs.

Chapter 4 : Training of cataloguers

4.1 Introduction

The education of cataloguers can not prepare students for all possible work situations. It can only provide a basis on which training for the specific work environment can be based. It is therefore essential that training must be done in all libraries, before entry level cataloguers can be expected to perform adequately.

4.2 Principles of training

Training is one of the management functions generally presumed to be taking place in every work situation because of its basic importance. The responsibility to train is acceptable to all the parties affected, the employer and the employees. All employers can claim to offer job related training. In practice however, this is not always faithfully and effectively pursued (Trainer, 1989: 367). The definition of training should be based on principles. Adherence to established training principles and techniques will help to make training successful.

Training is related to all other aspects of organizational functioning. In a library environment it can be viewed as a subsystem of the total library management system. It is also related to all other human resource management functions (subsystems) like recruitment and selection. Failure of training will result in breaking of the management system and affect its success.

4.2.1 Effectiveness of training

The questions that can be asked are how effective is the training that is being offered in the various job situations? Are principles and techniques of training known and applied? Is there any way of critically analysing the training function and how it benefits the

individual employee and their organizations? Leigh (1991: 18) defines effectiveness as “doing right things well”.

There is also a need to continuously check on the relevance of the training to satisfy the present and future needs because of the changes and developments in various jobs. Literature indicates that the practice of training is more difficult than it is considered to be (Creth, 1986: 12 & Baldwin, Gibbs and Slough, 1997: 267). This means that on careful analysis most training practices may not pass the effectiveness test. Purposeful training will entail proper planning, conducting and follow up until results are obtained.

4.2.2 The need for training

Training becomes more necessary as jobs become more complex. The challenge of computerisation improves a way of executing tasks whilst at the same time complicating jobs (Steinhagen & Moynahan, 1998: 3). At the same time as training becomes a necessity, resources to undertake better training are being cut. Training then becomes very expensive in terms of staff to do the training and financial resources. Proper accountability is of critical importance in such situations of scarce resources. Results of training have to be seen to be adding value to the job performance. Training should be seen to be results oriented. It must be thoughtfully established to achieve its intended purpose (Rothwell, 1994: 11). It is related to the goals of the organisation and should be seen to be working towards them.

4.2.3 Kinds of training

The kind of training pursued in this work is that which fosters improvement in both job performance and individual development (Jerling, 1996: 3). There is an interaction between the two aspects. Both the aspects of training and development as indicated when the concepts were defined, are regarded as important and interrelated. This is because it is only an employee that is well trained and continuously developing as

an individual who can be an effective performer on the job. The two pronged (training and development) nature of training discussed here reveal its important characteristics.

4.2.4 Training and development

Training is traditionally regarded as being concerned with knowledge and skills acquisition for the present job. It was viewed separately from development.

Development of the employee refers to learning opportunities designed to help individuals grow and be prepared for the future (Harvey & Bowin, 1996: 157).

According to Jerling (1996: 18) these opportunities are not limited merely to improving employees' performance in their current job but it enriches both the individual, the group and the organization. This study also looks at training as meant for the present and future of both the individual and the organization. Training is not a solution to all the performance problems but is an effective tool to foster improved job performance and individual development. Multi-skilling and flexibility which are very important in the current changing cataloguing environment can be achieved through this broad kind of training.

4.2.5 Benefits of training

It is important to indicate the benefits that proper training will have for the individual employee and the employer. An understanding of the benefits can foster commitment to training. Continual investment of resources in training will be justified by weighing the cost of the resources compared with its benefits. Lack of training can be very costly in a sense that the organization needs well trained staff to continue to survive and achieve its planned goals. Beach as cited in (Gerber, Nel & Van Dyk, 1987: 229) and Armstrong (1996: 529) supports the following as the major benefits of training:

- (a) Improved service. This benefit can be achieved in terms of high production rates, quality boost and general satisfaction of the clients. The need for quality control in

4.3 The status of training in South African university libraries

The present status of training in South African university libraries cannot be considered to be a total success. Research by Agostinho (1990) revealed that no adequate policies exist and insufficient fund allocation is a problem faced by trainers in South African university libraries. The situation can be described as that of lack of commitment to training. It is also partly a result of various related factors to be discussed in this section. The status of training will be looked at against the generally acceptable standards of training to be discussed later in this chapter.

4.3.1 Reasons for non-commitment to training

Libraries, like many other organizations have to train their employees to attain the skills they require on the job and maintain their effectiveness. Differences between individual libraries also makes it necessary that knowledge and skill specific to the situation be imparted. Despite this acknowledgement of the responsibility to train by libraries, there is evidence of lack of commitment in practice (Lombard, 1997: 16). Lack of commitment to training and development can be noticed by its unorganized nature, the poor level of support it receives, and no setting up of clear policies.

There are various reasons for poor training practice in university libraries. These reasons do not apply to all situations. Lack of enthusiasm about training is often largely because of lack of visible results caused by the fact that it is not offered properly addressing the needs at a proper time, and with proper techniques. This situation results in what Lipow & Carver (1992: 63) refers to as “transfer failure” which is a situation where training does not bring forth the desired results. The failure to bring forth expected results makes training to lose credibility. Training is thus viewed as a waste of time and money.

4.3.2 Factors inhibiting proper training

Proper training is inhibited from taking place by a number of other factors some of which have been carefully researched by training experts, amongst others Creth (1986: 10).

- (a) Management sometimes adopt the attitude towards employees as production mechanisms, with no interest in their development, often leading to poor training practice. Workers in turn develop an “instrumental attitude” towards work as a means to improve their lives (remuneration) and do not care on whether it is interesting or not, nor about the implications of their work. Priority is attached to production and job satisfaction is lacking.
- (b) Management relies on outside labour markets to satisfy the need of the organization for relevant skills at all levels.
- (c) Reliance on poaching of employees from other employers instead of developing their own staff. This practice is opted for instead of developing own staff for higher positions of more responsibilities or preparing them for perceived changes.
- (d) According to Creth (1986: 10), there is preference for trouble shooting problem solving approach to management rather than on a preventive, planned basis. This is viewed as a reactionary attitude where problems are only addressed as they surface rather than a visionary attitude to problem solving. Training as preparatory function for the future receives no priority.
- (e) Promotion of staff to other positions, resignations, Losing of trained staff as a result of poaching by other employers, can be potential threats to proper investment in training. No institution wants to turn into a training institute for others whilst it expects its trained staff to add value to its own operations.

- (f) Individual factors can also play a role in failure of training and the reluctance to pursue it. Some individuals resist change (Creth, 1986: 7 & Walbridge, 1991: 69) and any training that is change oriented is not welcomed. Burnt-out staff may view training with less interest as they do not expect to gain any knowledge and skill that will interest and benefit them. Despite management's effort to train, staff usually shows no interest.

Poor training practice is also evident in libraries. Cataloguers are often judged by the quantity of the work they produce (White, 1987: 48), which makes them likely to be viewed as production mechanisms. The problem with this attitude is that employees also tend not to attach meaning to what they do but only care to meet employer's targets. Standards are compromised in such situations. Employees also develop mechanisms of defence to account for their poor performance. Cataloguing duties are narrowly labelled as technical constituting of routine duties that may not necessitate any further training (Thomas, 1997: 6). Another fact that might promote reluctance to invest in cataloguer training is the notion that cataloguing is a dying art (Gorman, 1992: 695) so no need to waste resources on improving its training.

4.4 Learning principles applicable to training

Learning is expected to take place with the application of training. Learning takes place when "something not previously known is known or something which could not be done can be done" (Blanksby, 1988: 25). There are many theories on which the history of the practice of training is based. Researches has indicated that there are several learning principles which have to be considered and incorporated during training (Cascio, 1995: 246). These include the psychological aspects of training as it deals with human beings, both the trainer and the trainee. Failure to recognise the importance of these principles often leads to the failure of training. The trainer and the learner in a cataloguing environment are adults and principles relevant for the adult learner are considered relevant for this work.

The subjects of this study are adults, both trainers and trainees. The training of adults has been proved to present challenges which differ from those of children. This is important in the training of cataloguers because they are adults characterised by different learning patterns.

The following adult learning principles are listed by Van Dyk, Nel, & Roedolff (1997: 213):

- The need to know. Adults need to understand the why of everything they should do. They will need to understand why they need to undergo training and how they are going to benefit from it.
- Concept of the learner. Adults are self directing and independent. They can determine their own training needs. According to Callahan (1995: 378) adult learners value training that reflects trust, respect and concern for them. They should be respected and recognised in needs determination. This attribute makes learning effective since it is not imposed but based on self-realised needs.
- The role of the learner's experience. Adults have a tendency to make use of their previous experience. In a training environment additional information builds on what is gained through experience. The experience can be useful as a source in learning, e.g. it can be used to facilitate discussions which ultimately enforce learning. The trainer also has to acknowledge the past experience in his methodology to avoid boredom and resistance.
- Readiness to learn. Adults are ready to learn when the need to do so is experienced. Learning should be related to their needs and situation. It must be relevant to them.
- Orientation to learning. Activities are life or task-centered. Adults learn for a purpose and learning is most effective if related to real-life situations.

- Motivation to learn. The motivation to learn for the adult is largely intrinsic. Learning is internally borne due to the motivation and thus there is a tendency to be persistent.
- Authority relationships. Adults are self-dependent and self-responsible. The adult can decide when he wants to continue learning, where he will study and nature of subjects, etc. The adult resists imposed situations where he considers his authority to be ignored.
- Responsibility. The adult is co-responsible. Adults want to take responsibility for themselves and their learning. They are not totally dependent on the trainer. They need to feel that they personally control what happens to them (Rubin, 1991: 89).

Working with individuals some of whom are already used to some form of pattern and work and tools needs special attention and accommodation of individual learning styles (Epple, Gardener & Warwick, 1992: 87). Training must be designed in a flexible way.

The applicability of these principles will be looked into when the design of the training model is discussed. Throughout the training process from the initial to the concluding stage the designer has to bear in mind that he or she is dealing with adults.

4.5 Approaches to training

Training can take two basic forms, On-the-job or off-the-job training based on where the training takes place. A variety of methods can be used in both approaches. Methods are ways in which learning is transmitted. New methods also keep on appearing such as those based on technology (Botes, 1993: vi), e.g. use of multimedia technology.

4.5.1 On-the-job training

Most training takes place on the job. Training takes place mostly in the presence of the supervisor or more experienced staff (Rubin, 1991: 92). Various methods or techniques can be used on the job. Literature indicates an inclination to think of on-the-job training as one-to-one training only. This is a limited perception that could result in limitations to the scope of training offered. This kind of training is usually done in an unstructured way with no proper preplanning (Rothwell, 1994: 1). Existing on-the-job training practices can be improved by proper structuring to yield better results. On-the-job training has the advantage of being cost-effective as locally available resources are employed. Learning and doing can also take place concurrently. There are a variety of optional methods that can be used for on-the-job training to promote its effectiveness.

The following methods can be used for this kind of training:

- (a) **Demonstrations** - The trainer explains specific procedures, equipment and routines by demonstrating how a task is carried out. The trainee is shown what to do by the experienced staff member. The disadvantage is that the experienced member of staff may have the difficulty explaining things to the trainee (Intner & Hill, 1986: 309). This method does not provide for the creation of structure in the learning process, neither does it provide appropriate feedback which is required to improve effective performance (McKenna & Beech, 1995: 166)

- (b) **Lectures** - can be used to present background information, technical knowledge and procedures. This method may be used from the induction stage especially if more than one people are trained at a time. Its disadvantage is that it allows little audience participation which is desirable when dealing with adults.

- (c) **Discussion** - can be structured or unstructured. The trainer determines the focus and course of the discussion. Participants can bring up ideas which they gathered during their studies or past experiences.
- (d) **Programmed instruction** - this is good for providing information to trainees in small segments and allows to check progress. It is useful after completion of the induction to instruct on the actual job. The method could include the use of training manuals assigned to trainees to consult as they continue to learn. Effective training manuals can also be designed internally with contributions of all staff. Discussion of common problems encountered by staff and possible solutions can be noted and compiled into an effective manual. This facilitates learning at one's own pace and saves on trainers' time as he is not always directly involved. It also provide backup training.
- (e) **Simulation methods** (e.g. case study, role play) - These methods allow the gaining of first hand experience through imitation. Case study involves use of a well documented description of a real life situation to learn how problems can be solved. Role play depicts real life situations the trainee is likely to encounter. Problem solving techniques are learned through these methods.
- (f) **Mentoring** - Inexperienced employees are formally assigned to experienced ones to help them to develop job skills. The mentor offers advice, guidance, support, acts as role model and does counselling (Nankivell & Schoolbred, 1997: 3). This method is effective in preparation for more responsible job positions. The method can be subjective if not properly structured because employees may not receive fair treatment.
- (g) **Literature circulation** - It involves rotation of books, journals or journal articles or any information relevant to the job. This also serves as a way of encouraging professional reading.

- (h) **Research** - Staff can be assigned topics related to their duties. This method is a good tool for continuing training since staff can acquire in-depth knowledge on the subjects they are researching. This method can also be useful to prepare for envisaged change or developments likely to affect their work.
- (i) **Job exchanges** - job exchanges sometimes termed job rotation can be useful in allowing staff to gain experience in different operational areas. It can promote cooperation as staff will learn how their jobs are related to others.
- (j) **Regular staff meetings** - Staff meetings can serve as a platform where common work problems can be shared and solutions sought together. Working manuals can be designed accordingly.
- (k) **Projects and tasks assignment** - Staff are given work to provide experience of planning and implementation of a defined task and also learn to work with others (Blanksby, 1988: 280).
- (l) **Technology assisted training** - Training can be offered through prepacked training tools in the form of videos and computer software. The training packages can be used by individuals or groups of employees in their own time. The training is easily repeatable and cost effective. . Teleconferencing is another type of technology assisted training devices (Moss, 1993: vi). The methods should never be used without proper checking of suitability to the specific situation

No single method can suffice as a training tool. A variety of methods have to be tried out and used in relation to the perceived need of training. Proper planning can help to improve on-the-job training by using methods to complement one another and cover a wider scope of information to be imparted.

4.5.2 Off-the-job training

Off-the-job training takes place outside the normal working environment. This might be in the same organization but in some specially reserved premises or even away from the organization. Availability of financial resource and willingness to release staff plays a major role. Off-the-job techniques can help meet both organizational and personal goals. Most of the methods used on the job can also be used off the job. Other possible off-the-job training and development opportunities can be used as well. Trainers have to be familiar with all these methods so that they can be used when necessary.

The following methods can be used for this kind of training:

- (a) **Simulation methods** - The various simulation methods has already been discussed. They can be used effectively away from the job setting.
- (b) **Secondments** - Secondment of staff to other libraries will help staff to experience working in a different environment and learning new skills not practised in their jobs. The method is familiar for broadening job experience.
- (c) **Visits** - Visits to other library and information centres can help trainees gain a wider view of how their work can be performed even outside the local limitations. Exchange of ideas on job performance can also take place during the visits.
- (d) **Open learning** - open learning texts and courses enable people to study at their own pace.
- (e) **Further education/career development** - The actions employees take in their career progression. These methods should be encouraged by management who believes in preparing their people for future more responsible positions. According to Harrison (1997: 180) citing Williams "There needs therefore, to be a shift away from advancement oriented view of careers, and an increased emphasis

on career development at the same organizational level or within the present job". The method has a potential to stimulate and regenerate old staff.

- (f) **Interest groups** - This will encourage more meetings even for people in the lower positions to communicate with colleagues. It is an advantage that cooperation and the consortia among the different libraries in the country has encouraged these types of meetings.
- (g) **Professional contributions** - Staff should play an active role in professional bodies and activities. This help to give a wider professional outlook.
- (h) **Experimentation** - Trainees receives guidelines about what to do and are allowed to continue on their own. Trainees have a chance to test validity of the information they received by checking if the desired results are met.
- (i) **Conferences, seminars, workshop, courses and meetings** - This is one way of keeping abreast of developments. Limitations of finances and time play a role but efforts should be taken to encourage attendance. The trainee who attend should give a report about the training to colleagues who could not attend (Lipow & Carver, 1992: 71). Second hand information which is supposed to be taken back or reports and transfer of knowledge however cannot substitute personal participation. The prevalent situation among cataloguers is that most cataloguers do not get a reasonable chance to attend these meetings. They lose the feel of meeting other colleagues from different situations to talk to them and discuss common problems and frustrations.

Coutts (1991: 17) advises that methods which instil a wider professional perspective should be considered. This is relevant for the current situation in our country.

Professional literature, participation in committees, working parties and professional associations, attending meetings and conferences; and visiting other libraries are very important in broadening knowledge. Operation in isolation should be completely

discouraged especially because of the uneven levels of development and disparities in resources available at the different universities in the country. A great need exists to share and learn from one another. Cooperative training where concerned institutions share the responsibility and resources for training should also be encouraged.

4.6 Models that can be used for an effective training programme

Training has to be well organised if it has to be effective. Leigh (1991: 18) defines effectiveness as “doing right things well”. Good planning and implementation of training have to take place in order to bring desired results. It is clear from literature and personal observation that although some training takes place, it is not in a systematic way that can bring desired results. Botes (1994: 132) states three different ways in which training can be done:

- training by trial and error
- unsystematic and unplanned training
- purposeful and well planned training.

The last form of training is the only reliable one for acceptable results. Well planned training will result in a form of a programme to guide its operations. The aim is not to suggest a rigid structure but to have a framework that will guide training practice. The model envisaged in this study is one characterised mainly by:

- Well planned structure. Have a plan that culminates in production of a programme to serve a guiding framework.
- Continuity. Have an element of continuing throughout the period of employees’ employment.

- Flexibility. Be flexible to accommodate the needs of various individuals at different times and be responsive to new developments.

4.6.1 Advantages of a well planned training programme

Conroy (1973: 4) defines planning as a process in which the present situation is carefully examined and preparation is made for changing that situation. A plan is worked out to achieve a specific purpose and to direct the course of events. A training programme is also meant to direct the success of the training process. A well planned programme can be distinguished by several important characteristics.

- It is not controlled by the forces of events. Training and development needs are identified in a structured manner (Castelyn & Webb, 1993:140)
- It will be possible to modify easily and update what has already been developed for the same position when subsequent training is required
- Present needs and future plans can be accommodated
- It can be correctly placed in context

4.6.2 The system approach to training

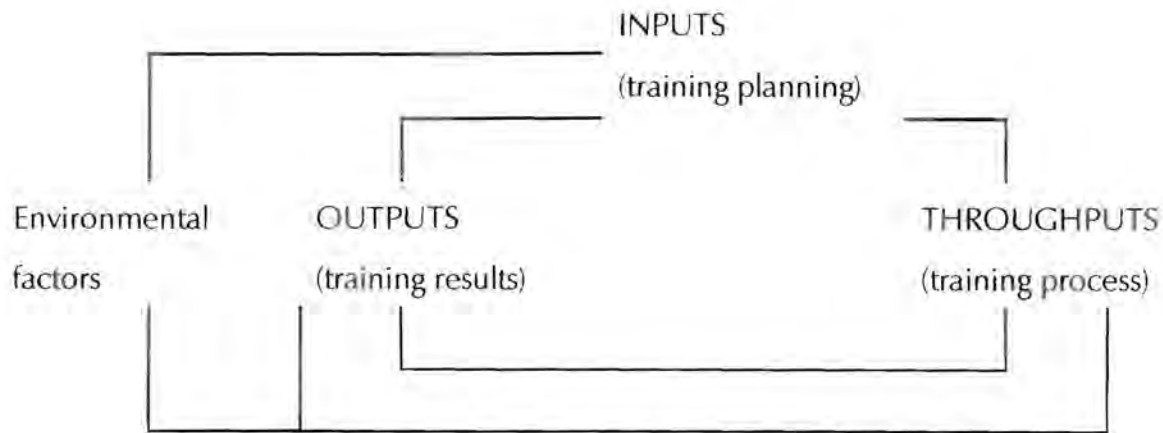
Universities usually have training departments responsible for most needs of their human resources. There can however be special training programmes for specific units or departments concentrating on the specific needs of that unit. Such programmes comply with the parameters of the goals of the parent institution. Both broad and individual programmes should complement each other. Training is thus regarded as a subsystem of the whole university operation and also of the specific departmental system. The system

approach is preferred to indicate all related situational factors that shape the training that takes place.

A system can be defined as a network of interrelated components (Cascio, 1995: 48). According to Buckley & Caple (1995: 26) a systems approach to training can mean that training is a subsystem interacting with other subsystems upon which an organization depends for its progress and survival. Within a university library training is a subsystem of the total human resource system. The system theory argues that for every system to function normally there must be inputs, throughputs and outputs (Gerber, et al., 1987: 126-127) (see figure 1). The institutional setting and environment also determine the success of training. This implies that training is an open system which is interrelated with its environment (Werther & Davis, 1996: 20). The environment must be supportive. Environmental factors include factors like technology, time, finance, opportunities etc.

The second meaning of a systems approach to training is that there is a logical relationship between sequential stages in the process of training (Buckley & Caple, 1995: 26). The training process itself is also a system in that all components that constitute an effective training practice must be thoroughly executed. There should be interaction within the components of training and also between training and other components of the human resource system, library system and the larger university system. The success of training will be affected by factors from within the training system itself and from outside factors from the larger system. A training system model based on models by Gerber, et al. (1987: 126-127) and Osborne (1996: 43) is given below.

Figure 1: Training system model



Inputs include needs and resources, throughputs involve selection and management of resources whilst outputs are the goals or ends (Osborne, 1996: 40). The system approach suggests that all parts are important and interrelated and none should be overlooked. One characteristic of a system is the cycle of events - one aspect taking place after another in a repetitive order (Botes, 1994: 2).

4.6.3 Steps in the training process

There are a number of factors which should be carefully considered when planning and implementing an effective training programme. These are reflected in a variety of training existing programme models.

These factors are clearly depicted in a training design model by Goldstein as discussed by Jerling (1996: 363) and Kirkpatrick (1994: 3). The process consists of needs determination, objectives setting, course content, selecting participants, scheduling, selecting facilities, selecting instructors, aids, programme coordination, and evaluation. All these elements constitute the training system. The steps of training takes place in a circular fashion, from needs determination to evaluation and back to the initial stage again repeating themselves.

4.6.3.1 *Needs determination*

The process of needs determination is the first step in the planning of a training programme (Jurow, 1992: 8). Every training programme must be based on correctly researched needs for it to be successful. Needs may also change with time due to constantly changing job situations. This suggests that the process of need determination has to be reviewed from time to time. Involvement and cooperation of the people who are supposed to attend the training will prove to be fruitful in the determination of needs. There must be inputs from everyone (Callahan, 1995: 378) This will be in accordance with the adult learning principles already discussed.

Osborne (1996: 64) indicates a number of areas on which training can be focused and from these three categories of needs were identified: organizational needs, group needs and individual needs. Organizational needs may be linked to vision of the organization and change in strategies. Group needs may be linked to factors like change in operations (which may necessitate whole staff training). Individual needs may arise from the characteristics of the job and job related interest. Needs may be tasks specific or broad based (Castelyn & Webb, 1993: 155). They can also be categorised as short term (for immediate job execution) or long term (focussed on the future), (Hirshon, 1991: 54). All needs categories have to be accommodated and addressed by a training programme. All jobs comprise three broad components: skills, knowledge and attitudes (Harrison, 1997: 254).

The gap between performance and goals is seen as an opportunity for development (Sullivan, 1992: 8). The existing problem of failure to catalogue to acceptable standards suggests the need for training and development. The needs of cataloguers in the new roles are undeniably increasingly multi-skilling and management oriented. It is important that the skills and competencies required in this field must be sufficiently researched and met through training.

Various techniques can be used to determine needs: job descriptions, interviews, questionnaires, personal observation and discussion with staff and management (Revill, 1987: 54). Training has to be work related and needs directed (Lombard, 1997: 15)

4.6.3.2 *Setting training objectives*

As already indicated, training forms a part (subsystem) of the library system, its objectives must be related to the objectives of the library. Objectives are meant to state the desired behaviour and conditions under which training is to occur (Werther & Davis, 1996: 288). They also help measure the success of training at the end of the process. Training objectives also guide the trainee to have a specific understanding of the whole training process and its benefits.

The following can be considered as objectives of a training programme as discussed by Botes (1994: 130) and Castelyn & Webb (1993: 176):

- (a) To develop a range of skills in employees and their successful practical application
- (b) To increase productivity
- (c) To promote morale and enthusiasm of staff
- (d) To promote awareness of current events related to the job.
- (e) Professional development of staff to exercise professional judgement
- (f) To develop a broad perspective of outlook towards the job in order to promote flexibility and future orientation.
- (g) To equip trainees with knowledge and skills in preparation for senior position or managerial roles.

Objectives of a specific programme are to be established guided by what the programme is aiming at.

4.6.3.3 *Course content*

Course content will be guided by the needs and objectives of the programme. Other factors like target trainees will also guide content design. The course content will also determine the methods of training to be used. The content should be comprehensive and easy to understand. Knowledge of the aspects to train on is important in content design.

4.6.3.4 *Selection of participants*

Choosing of trainees and trainers should be done with great care as the human factor is the centre of the training practice. It should be determined who can benefit from training, whether training should be voluntary or compulsory and grouping of participants (Kirkpatrick, 1994: 11).

Every catalogue is a potential trainee. Care has to be taken that only relevant people should attend various training sessions. This process needs control based on the determined needs.

4.6.3.5 *Scheduling of the training process*

Scheduling is one of the critical factors in a work environment. It involves the preparation of a list of staff and their training needs with an indication of allocation of staff, date and time and location for training (Creth, 1986: 70). Training does not take place in a vacuum but has to be conducted within the confines of time available to do work and cater for additional things. The management of workstations involved has to be aware and involved in the scheduling of training to avoid conflict of interests.

Most of the time cataloguers are hard pressed with large quantities of work to be processed and there is very little time available to accommodate other issues despite how

essential they may appear to be. Cataloguers hardly have time consult their cataloguing tools and this can lead to high error rates and poor bibliographic standards.

4.6.3.6 *Facilities needed for training*

An environment suitable for learning to take place is an important consideration in the choice of training facilities. This is usually ignored especially in on-the-job training. A lot of negative factors interfere with the training process. Things like space shortages, noise, telephone interruptions or any thing that may cause disruptions must be avoided. This sometimes suggests moving to a secluded training room or space which is usually difficult due to space shortages. Facilities chosen will be guided by the kind of training to be offered.

4.6.3.7 *Appointing instructors*

Training is usually left to the immediate supervisors, especially with training of new employees. It is never established if these trainers have the qualities required of a trainer. No effort is usually made either to help the trainers acquire the necessary expertise. No special status is assigned to them as trainers which is a disadvantage since they have to fit the training in, among many others that they do. Creth (1986: 41) says any staff member who plays a significant part in training should be viewed as a trainer. This view will improve the recognition of the present trainers and review on whether they qualify to do the work or not.

The present practice in cataloguing is that senior or experienced cataloguers who are viewed as being more knowledgeable in cataloguing are assigned to training. The head of cataloguing usually bears the responsibility and delegates where possible. Training does not receive top priority treatment in such cases.

Conroy (1973: 11) and Creth (1986: 42) specify the following qualities that are considered to be important for a trainer is:

- Familiarity with the subject matter
- Possession of a positive attitude towards work and training
- Possession of training skills
- Interest to train. A person who likes what she is doing can be good at stimulation of interest
- Openness to new ideas and suggestions
- Commitment to continuous training: Answering queries, offering advice and counselling whenever necessary.

4.6.3.8 *Training aids*

The function of training aids is to assist in the effective delivery of information. Audiovisual material, flip charts, overhead projectors, manuals, textbooks, case studies, computer software etc, can be used. Aids chosen should be suitable for the content and method of training. Aids should be clear and understandable. They should be carefully chosen to suit the kind of training to take place.

4.6.3.9 *Coordinating and conducting training*

The training process needs careful coordination and proper way of conducting to be successful. Coordination facilitates smooth running by putting everything in proper relation to each other (e.g. trainees, facilities, breaks etc.).

Proper conducting of training involves knowledge and skill in how to convey content (e.g. use of correct training methods for different lessons), effective presentation (e.g. put trainee at ease and stimulate interest), and consideration of individual learning abilities and problems.

Sequencing of activities also need to be carefully planned. The sequence of activities should build steadily towards achievement of programme objectives (Conroy, 1973: 13). Training should build up from the simple to the complex to facilitate understanding.

4.6.3.10 *Evaluation of training*

Evaluation is necessary to measure the returns on the investment in training (Lunn, 1992: 155). Training is an expensive exercise and needs to be justified for its funding to continue, especially where financial resources are scarce. All forms of training have to be evaluated. There generally has not been evaluation of on-the-job training. Off-the-job training is usually limited to reports by those who attended such training. Well structured training will be easier to evaluate than unstructured training.

Two possible kinds of evaluation are possible - programme evaluation and outcome evaluation. The Kirkpatrick method developed in 1959 indicates the four levels of training evaluation (Zielinski, 1996: 4). These levels are highly recommended in training literature and sufficiently cover evaluation of all relevant aspects.

- (a) Reaction - establish trainees' reactions to the course.
- (b) Learning - test what trainees learned from the training they attended.
- (c) Behaviour - check on behaviour change on the job.
- (d) Results - check if the change improve on organizational performance.

Evaluation can take place by use of several methods like, questionnaires, tests and appraisal (Castelyn & Webb, 1993: 157). Line managers and trainees can mutually assess training undergone in terms of performance and employee development. Collected information must be clearly reported. All parties benefit from relevant training.

Evaluation needs to be presented positively to the participants. It should be understood to be contributing to improvement of both employees and the organization with no

hidden intentions. Training needs changes with time and are influenced by changes within the organization. Programmes also need to be changed or developed to improve them or change when need be. New techniques of teaching can be incorporated. According to Duchin (1997: 42) the golden rule of training is train, evaluate and retrain.

4.7 Training requirements of different groups of cataloguers

There are significant factors relating to cataloguing practice that have to be considered in the training of cataloguers. Training does not take place in a vacuum.

Training for cataloguers has to take the various levels within the cataloguing practice into consideration (Intner & Hill, 1986: 370). These levels are described in terms of experience and the type of job done. Staff can be grouped as “new” or “experienced”. Dockel (1996: 114) and Creth (1986: 17) categorise the levels of training as basic for inexperienced or new staff and continuing education. Training can also be according to type of work such as original and copy cataloguing. Training is equally important to all levels of cataloguing staff. The unique needs of staff members cause them to respond well to different types of training.

4.7.1 New staff

Trainer (1989: 371) indicates that adequate training for the professional cataloguing staff constitutes of two components: laying the basic foundation for cataloguing work and assuring that cataloguers’ skills continue to grow.

Literature indicates that the basic foundations of cataloguing are still prerequisites for employment in cataloguing jobs. Basic knowledge of AACR2 rules, classification and subject cataloguing are regarded as essential (Hill, 1997: 81). Libraries in South Africa and elsewhere in the world have had problems hiring for cataloguing positions, because candidates have little or no experience in cataloguing either because they are fresh from

school and have no practical job experience. They usually bring too little experience gained only during practical work done to satisfy degree requirements. The responsibility to train these cataloguers remains with the employing library.

The training of new staff is considered a critical time in which the foundation is laid and the future of the cataloguer is determined (Intner & Hill, 1989: 351). Initial job training is usually conducted at this time, to produce a cataloguer who can work independently, and who knows exactly what the work of a cataloguer is (Intner & Hill, 1989: 354). The best training takes place during this time when the employee is still very eager and ready to learn.

Good work attitudes can be fostered during this time. This is the time where cataloguers must acquire a sense of accountability for their work, and the far reaching impact their work may have on information provision. This broad perspective is often lacking among cataloguers. This is sometimes reflected in the careless attitude adopted especially when it is known that the work will be going through a quality control stage. Decision making skills are often lost at this stage. This is unfortunately also the time when bad job practices can be acquired through imitation. Often the employer is faced with the pressing need to train and have a functional cataloguer on the job as quickly as possible (Intner & Hill, 1989: 346). Most essential aspects are then left out during hasty training.

After initial training has taken place, there is often a tendency to decrease the intensity of training, thinking that the training is complete. Both trainer and trainee want to engage in the immediate challenges of their work as soon as possible (Coutts, 1991: 19). Training should lead from initial job training to continuous training because of the need to keep up with development.

4.7.2 Experienced staff

It is no longer possible for cataloguers to survive in their job without continuing training. There sometimes is a need to retrain cataloguers in the basics of cataloguing. Skills can deteriorate and become obsolete (Robbins, 1997: 272). Sometimes there is a need to update knowledge and skills. New formats and continuous changes in task operation necessitate continuous revision and acquisition of knowledge and skills.

Experienced staff need to continue to adhere to acceptable standards of practice. When general performance problems are experienced, retraining can be a solution (Creth, 1986: 20). There is need to interpret change continuously and train in new skills. The interests of existing staff will be more diverse and the needs will be more individual (Revill, 1987: 36). Career planning can be used to improve the effectiveness of existing staff (Jurow, 1992 : 8). Cataloguers can develop their careers or themselves in many ways. Nankivell & Schoolbred (1997: 2) says "development of individuals' careers can take many forms beyond traditional promotion to a higher grade within the same field."

The introduction of technology showed that a lack of proper training made it difficult for some experienced staff to adapt to technology use. Cataloguers who are very well versed in the rules and principles of cataloguing cannot be fully functional in the new environment. Their promotion to the management of the cataloguing process is also affected, because the management of technology is also involved. The situation could have been circumvented by well-planned training.

4.7.3 Staff doing original and copy cataloguing

Training in cataloguing can also be done for two levels of staff, namely copy cataloguers and original cataloguers, depending on whether the two functions are handled by different members of staff. The practice in most university libraries in South Africa is that the two duties are handled by the same cataloguer, who happens to be professional. This

study concentrates on the professional level. The basic foundation for the training of staff will be the same since all cataloguing functions are based on similar cataloguing theory, principles, and procedures.

Copy cataloguing is considered to be routine, since most of the records are copied from existing ones with little or no alteration. It is however not completely routine, because sometimes the copy need to be scrutinized or substantially changed (Hill, 1988: 96). Problems with existing records on cooperative catalogues have to be identified and recommendations for the amendment of some records have to be made, if the corrections cannot be made locally. Although local deviations are not advisable in a cooperative environment, they cannot be avoided entirely in some instances (Steinhagen & Moynahan, 1998: 8). In some cases they are prompted by the need to accommodate the library's local special needs of patrons (Bowen, 1998: 76). Decisions have to be backed by sufficient knowledge of cataloguing. Proper training in the basics of cataloguing is necessary. This can be done easily by properly trained nonprofessional staff with professionals supervising.

Original cataloguers may however need even more intensified training as they have to create records from scratch. A lot of decision making is necessary in the application of theory to the practice of cataloguing. Cataloguers have to be proficient in extracting important information from the records and have the knowledge and skills to use all other tools that can assist in additional information provision. Problem solving skills are required when dealing with records of unfamiliar structure or media of publication.

4.8 Conclusion

Library managers have to show full commitment to training. An official training policy should be set up to show commitment and ensure support by management. The policy should be well publicised to the employees and more resources (e.g. money, staff, time) be made available. Good planning of training should take place. A well planned but

flexible training programme offers many advantages towards effective employee training. The principles and techniques established in general training theory should form the basis for every training programme.

The emphasis on development indicated in the introduction, challenges libraries to shift emphasis in that direction and improve on existing training programmes wherever they are found to be lacking. Checklists should be drawn to ensure that all of the required steps are included in every training process.

Trainers should also be fully committed to their job to produce the best training programmes possible with the little resources available. Continuous research should be done to find new and better improved methods and opportunities for training. Trainers should exercise the principle of doing much with little in the face of genuine resource scarcity.

Another challenge facing trainers is the current changes in job structures and roles. Some people may find new roles as imposed and thus not react positively even to training. Training must accommodate such unique cases and be flexible to their needs. Common problems like limited funds, staff, time and the impossibility of establishing a training unit can be overcome by proper training planning.

The individual cataloguer will function best if he or she understands the overall system and the context in which she is operating (Intner & Hill, 1989: 345).