Metropolitan Library System
Short Term Learning & Development Plan*

Customer	Audience	Timeline	Resource Planning	Content	Notes
Customer Service: M.E.T.R.O. Way 1	Member Services Staff	May-June 2017	Developed and taught by M.E.T.R.O. Way work group (TBD)	Triage, owning your expertise, relationship building, connecting customers with resources, instructing vs. doing	Mandatory for all staff
CarlX Training: Focus on Circulation	Access/ Engagement Staff	May-June 2017	Taught by Subject Matter Experts (SMEs)	Searching the catalog (OPAC and CarlX), borrowing policy and procedure, materials check-in and check-out, placing holds, working with member records (library accounts), handling blocks on accounts, taking payment, etc.	Primarily for Access Specialist Is, but open to all staff
SignUp and Spaces	Access Staff	May-June 2017	Taught by Bobby Reed, Bridget Williams, Mary Robinson	room reservation, calendar of events, scheduling programs	At least one Access Manager and one Access Specialist II at each location; other identified staff
Technology Basics: Assisting Members with Self-Help Technology	All staff	May-June 2017	Developed by work group and taught by SMEs	printers, copiers, computer reservation, fax/scan	For all staff who need it
Understanding and Embracing Change	All staff	May-September 2017	Taught by outside consultant	Defining change, the change process, skills and strategies to navigate and persevere during a time of change	Offered several times to all staff
Leading Change	Managers/ Supervisors	May-September 2017	Taught by outside consultant	Change drivers, continuum of reaction to change, change implementation process and tools, coaching strategies	For all system leaders during X-Change in June 2017
Weeding 101	Access Staff	June-August 2017	Taught by Collection Management SMEs	Learning why and how to weed, the expected results, and how to determine what should be weeded and what should go to the Collection Anywhere Center (once the Center exists)	Prerequisite for CarlX: Focus on Collections Training; SRP limitations
Technology Basics: Providing Computer Help 101	Public Service Staff	June-September 2017	Developed by work group and taught by SMEs	Helping a customer navigate computer basics including accessing the internet, using email, saving a file,	Optional; for those who need it or want a refresher course; SRP limitations
Point of Sale Training	Public Service Staff	June-August 2017	Developed and taught by Metro IT/SME to be determined		Mandatory for those who have not taken it; SRP limitations
Using Intacct Financial Management Software	Managers/ Supervisors	June-August 2017	Developed and taught by Metro Business Office/Vendor		Mandatory for all managers/supervisors (X-Change meeting)

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CarlX Training: Focus on Collections	Access/ Engagement Staff	July-September 2017	Taught by Collection Management SMEs	Running/using reports; identifying missing materials; lost, traced, withdrawn materials; new items report	SRP limitations
Collection HQ Training	Access Staff	August-October 2017	Taught by Collection Management SMEs	Running/using reports: collection checks, long overdue, grubby items, dead items, collection use, and popular authors; transfers; performance reports	
Electronic Resources: Basic Training	Open to all staff	August-October 2017	Taught by Kellie Delaney, Sadie Bruce (might also include vendors)		Mandatory for Engagement staff
Customer Service: M.E.T.R.O. Way 2	Member Services Staff	September-October 2017	Developed and taught by METRO Way work group (TBD)	Information seeking behavior, learning styles and tailoring approach to meet members' needs, reference/reader's advisory, etc.	
Scheduling to Meet Business Needs	Member Services Managers/ Supervisors	September - October 2017	Developed and taught by SMEs (TBD)		
Intacct Basics	Staff who place orders	September-October 2017	Developed and taught by Metro Business Officer/Vendor		select staff who use the Intacct system for placing orders
Engaging with the Community	Engagement Staff	September-October 2017	Developed by work group and taught by SMEs (TBD)	Community engagement and developing and maintaining community relationships	
Planning and Implementing Programs	Engagement Staff	September-October 2017	Developed and taught by Learning Experiences Staff		
Electronic Resources: Advanced Training	Engagement Staff	September-October 2017	Taught by Kellie Delaney, Sadie Bruce (might also include vendors)		
Introduction to Merchandising	Access Staff	September - October 2017	Developed and taught by SME or consultant		E-learning possibly an option
Customer Service: M.E.T.R.O. Way 2	Member Services Staff	November - December 2017	Developed and taught by M.E.T.R.O. Way work group (TBD)	Information seeking behavior, learning styles and tailoring approach to meet members' needs, reference/reader's advisory, etc.	
Technology Basics: Providing Computer Help 101	Member Services Staff	November - December 2017	Developed by work group and taught by SMEs (TBD)		Optional; for those who need it or want a refresher course

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Supervisor Training Program	Managers/ Supervisors	Fall 2017	Taught by Kate Beavin, consultant; course creator	Overview, legal aspects, interviewing and hiring, managing performance, communication, developing teams, ethics	For new managers/ supervisors; also for those who have not fully completed all modules of the course

revised 4/26/17

*This is a work in progress. We will continue to update as needed based on organizational need and priorities.