

# CLENEExchange

December 2002

“School ends, but education doesn’t.”

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## PATRIOT Act Training

by Karen Wilber (wilberk@tblc.org)

My library consortium recently had a workshop on the USA Patriot Act program; here are a few tips to help those of you who might like to plan a similar event.

I had four goals which I stressed to speakers and participants. 1. Distribute accurate information. 2. Provide time to ask questions of the panelists. 3. Have participants leave with enough information to set/revise policy. 4. Give participants enough information to train staff in handling law enforcement inquiries.

The panel included a law professor who specializes in constitutional law and international/national security. He was able to address the issues from a legal standpoint and answer questions about the law. The panel also included a Special Agent from the FBI. He was able to answer law enforcement questions and give perspective on the different types of court orders and how they would impact libraries. The inclusion of an FBI agent was cited repeatedly as the most helpful aspect of the program.

Both panelists had been given a “stack” of links and documents relating to the USA Patriot Act and libraries prior to the program. They both did additional research and brought files full of documents to consult, as needed, during the program to answer questions.

They were impressed with the ALA document “Confidentiality and Coping with Law Enforcement Inquiries: Guidelines for the Library and its Staff” ([www.ala.org/alaorg/oif/guidelineslibrary.html](http://www.ala.org/alaorg/oif/guidelineslibrary.html))—except they didn’t advise calling the media if your library is served—which is not quite what this document advised, but it could be interpreted that way. They were also impressed with Mary Minow’s work ([www.librarylaw.com](http://www.librarylaw.com)). She has an excellent chart that summarizes the various court orders [w\(ww.llrx.com/features/libraryrecords.htm\)](http://www.llrx.com/features/libraryrecords.htm). Mary was very helpful with questions I had prior to the program.

All participants were provided with handouts linking them to various ALA sites, Mary Minow’s work, and other web documents that are useful for reviewing and setting policy. I had 4 handouts: the 2 referenced above, the handout from the Infopeople webcast on August 15th ([www.librarylaw.com/Patriotbib.htm](http://www.librarylaw.com/Patriotbib.htm)) and a handout I made that referenced websites dealing with USA Patriot Act and Florida law.

What worked well?

• Participants had ample time (1 1/4 hours) to ask questions. It never veered into the realm of “philosophical debate,” but there were some excellent questions raised regarding privacy of records and investigations.

• Coffee, juice and bagels. Gotta have food.

• The program broke down some walls and stereotypes between library and FBI. It’s more than just hair buns n’ guns. We all learned more about the concerns of both organizations.

What would I do differently?

If I’d had more time, I would have solicited advance questions from the library directors more forcefully prior to the program. I asked a few directors for input during planning and received very little—though what I received was good. Our speakers were prepared, but this would have helped even more.

*Editor’s note: Taken from the CLENE Discussion List.*

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the  
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## Connecticut's Continuing Library Education Certificates

by Anita R. Barney ([abarney@wclc.org](mailto:abarney@wclc.org))

Beginning in July 2000, library continuing education providers in Connecticut, including the State Library and regional consortia, began offering Continuing Library Education Certificates (CLECs) for completion of approved continuing education opportunities. "Approved" can be almost anything except a college-credit course, as long as it's related to the person's job. Currently the State Library, the consortia, and the Connecticut Library Association offer CLECs. After completing 75 hours of instruction, participants may send their records to the State Librarian, who will then send a Continuing Education Award to that person.

The CLEC program was developed by the Task Force on Structure and Policy of the Advisory Council for Library Planning and Development (ACLPD). The Task Force sought to encourage continuing education for library staff through several recommendations:

- That all libraries encourage and support continuing education for their library staff;
- That in order to develop and maintain skills, library staff complete a minimum of fifteen (15) hours of continuing education each year.
- That in order to recognize the need for professional development, the Connecticut State Library acknowledge continuing education efforts by issuing Continuing Library Education Certificates.

The goals behind the establishment of the Continuing Library Education Certificate program are:

- To encourage high quality, professional continuing education opportunities for library staff;
- To encourage library staff participation in continuing education;
- To recognize library staff participation in continuing education;
- To provide library staff with a method to keep a record of their continuing education achievements; and,
- To verify that professional development activities have met standards and are contributing to the competencies of the staff of Connecticut libraries.

Each of Connecticut's four multi-type consortia, the Cooperating Library Service Units, takes responsibility for a statewide service. Western Connecticut Library Council has been managing continuing education for the past ten years or so. We have found that offering CLECs doesn't affect people's decision to attend a workshop – this is not a requirement for certification. But attendees are happy to take their certificates back to their libraries as proof that they attended a class (although we don't guarantee

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# Technology Training in New Mexico

by Mary Stillwell (*mary@catts.us*)

From June 26-28, 2002 librarians from all over the state of New Mexico converged in Santa Fe to partake of three days of technology training and sharing ideas with their colleagues. The New Mexico State Library (NMSL) Technology Institute was themed “Kernels of Knowledge” and funded by a Bill & Melinda Gates Foundation Training Program Grant.

I was invited to come and be a trainer for the institute because of my background teaching computer skills to library staff with various skill levels. It was a great experience—working with library staff from all over the state of New Mexico, and enjoying the state itself—they don’t call it the “Land of Enchantment” for nothing!

NMSL staff, Stephanie Rawlins Gerding, Continuing Education Director and Pam MacKellar, Technology Consultant, planned the event to meet the technology training needs of public, tribal and developing library staffs. In a needs assessment conducted before the training institute, the following topics were identified and used to form the focus for the institute:

- Managing and maintaining public access computers
- PC maintenance and troubleshooting
- Creating library websites
- Software training (Word, Excel and PowerPoint)
- Internet Searching

Over 100 library staff from all over the state stayed at the institute site, the College of Santa Fe, in campus apartments. Meals were provided, including a group dinner at a Santa Fe restaurant. The classes were held in 6 computer labs and classrooms around the campus.

The trainers for the institute were chosen for their expertise in the areas of library technology and public access computing. They came from the University of New Mexico, the Washington State Library, the University of Washington, the Bill & Melinda Gates Foundation, the Santa Fe Indian School and LSSI.

Participants attended classes in a conference style format, choosing the most relevant topics for their situation from a three-day schedule of classes. The

first day consisted of a welcome from the state library staff, a keynote address by technology consultant Joan Frye Williams, an update on the Gates Foundation grants from help desk technician Joe Sullivan, and a wine and cheese reception.

The next two days consisted of 6 tracks of classes offered all day Thursday and half a day on Friday. Examples of classes that were offered include:

- Technology Planning
- Ergonomics
- LANs for Libraries
- Software Classes (Word, Excel, PowerPoint)
- Internet Searching
- Basic PC Maintenance and Troubleshooting
- Using Volunteers for Computer Training
- Best Practices of Public Computer Training Programs

Participants were even able to unwind with a Tai Chi class after filling their heads with new technology knowledge!

Feedback on the institute was very positive, with 92% of respondents giving the Institute an overall rating of above average to excellent, and 97% agreeing that they acquired knowledge they can use. Some of the feedback received included:

• I feel this was one of the best-organized State Library functions I have ever attended. Overall, it was a great opportunity to have been a part of this Technology Institute and I hope to see a lot more trainings such as this one in the future.

• I love attending institutes such as this because of information learned, but also because of meeting old friends & becoming acquainted with new friends.

• Thank you to the State Library staff who put this together!; Excellent job and of course the Gates Foundation trainers always good!

To follow-up on the Institute, Gerding and MacKellar

*See Technology Training continued on page 5*

# PROPOSED BY-LAWS CHANGES

by Kathy Schalk-Greene, Chair, CLENE By-Laws Committee

The CLENE Board proposed a number of changes to our by-laws that will help CLENE continue to grow and thrive as a Round Table within ALA. Our current by-laws require that written notice of any proposed changes be sent to members in at least 30 days in advance of a vote ... so here they are!

The following will also appear on CLENE's 2003 ballot to elect new officers and board members, which will be sent out from ALA later this spring.

~~Strikethrough~~ shows current language proposed for deletion.

**Bold** shows proposed new language.

CHANGE 1. Article II: Purpose

Sec. 1.4. To create an awareness of, ~~senses of~~ **and** need for, continuing library education on the part of employees and employers.

Rationale: This change clarifies the language of this section.

CHANGE 2. Article IV: Officers

**Sec. 2. 4. Treasurer. The Treasurer shall serve for two years.**

Rationale: The position of Treasurer was approved in a by-laws change approved in May 2002. This addition to the by-laws specifies that office and the term.

CHANGE 3. Article VI: Board of Directors

Sec. 4. Terms of Office. Directors elected at large shall serve for two years. They shall be elected for terms expiring in different years. **Directors shall be eligible for election to a second consecutive term.**

Rationale: This addition makes eligibility for a nomination for a second term possible and brings the terms of office for Directors into agreement with terms of officers as specified in Article IV, Section 2 for Officers, Terms of Office. All officers of the Board shall serve the terms of office as specified herein, and shall be eligible for election to a second consecutive term.

CHANGE 4. Article VI: Board of Directors

Sec. 8. 2. In case of a vacancy in other elected positions, the position will be filled by the individual receiving the Second highest number of votes in the previous election. In the event that the individual is unable to serve, ~~Executive Board~~ **Round Table officers** will fill the position by appointment.

Rationale: This change allows a position to be filled efficiently between the scheduled Board meetings at Midwinter and Annual Conference.

CHANGE 5. Article VII: Membership Meetings

Sec. 3. Votes by mail. Votes by mail **or email** may be authorized by the Board between meetings. ~~Mail~~ Ballots shall be conducted by the President in such manner as the Board shall determine.

Rationale: This change allows CLENE to use email communications to conduct official votes.

CHANGE 6. Article IX: Nominations and Elections

Sec. 1. Nominations. The Nominating Committee shall present candidates to the Board at the Midwinter meeting preceding an election for positions of Vice-President, Secretary, **Treasurer** and Directors.

Rationale: The position of Treasurer was approved in a by-laws change approved in May 2002. This change to the by-laws adds Treasurer to the list of officers.

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*CLECs continued from page 2*

that it's proof that they actually learned anything).

The program description is available on the State Library homepage at [www.cslib.org/clec.htm/](http://www.cslib.org/clec.htm/).

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*Technology Training  
continued from page 3*

are holding focus groups around the state to get first-person input from the librarians in order to design follow-up training that will be delivered in 4 locations around the state.

Based on the focus groups and on technology training surveys mailed to the libraries, each location may have different classes based on the needs of that region of NM.

Gerding and McKellar will also be presenting at the Computers in Libraries conference next year, on the topic of planning training events, using the Technology Institute as their case study.

For libraries or state library agencies that need to plan a large-scale training event, the Technology Institute can serve as a great model.

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# Secret Patrons and Virtual Field Trips

## Adventures in Training Library Staff for Virtual Reference

by Mary Bucher Ross ([mary.ross@spl.org](mailto:mary.ross@spl.org))

Hundreds of libraries—academic, public, and special libraries—are now offering live virtual reference services (VRS), an exciting way to reach out to users in “real-time” through the Web. (You can see a directory of chat reference services maintained by Stephen Francoeur at <http://pages.prodigy.net/tab01/chatlibrarytypes.htm>).

For many years, libraries have been providing virtual collections of resources via their Web sites, and delivering reference services through e-mail and Web-based forms. These delivery methods are asynchronous, not done in real-time, and require that a user wait for the answer to a question.

Current innovations in virtual reference services are focused on real-time (synchronous) interactions between library staff and patrons, using software that incorporates chat communication along with the ability to guide a user through a Web search. These technologies represent a fundamental shift in library services—transforming library materials, resources, and personnel from building-based services to point-of-need services.

Although rooted in traditional reference services, effective virtual reference requires a new set of skills. The lack of visual or auditory cues in the chat interaction increases the possibility of miscommunication. Multitasking abilities and excellent control of the Windows desktop are essential for success with this new software. And with high user expectations about what can be found on the Web, library staff need search strategies for quick retrieval of accurate online sources.

For many of the staff providing or planning these new services, preparation has consisted mainly of training on software, provided by the software vendors themselves. The Fall 2002 supplement to **Library Journal**, called **netConnect**, contains an article by Buff Hirko on the vendors for VRS software. Few training programs identify and build on core competencies for virtual reference,

independent of the software used for delivery.

In June 2002, co-worker Daria Cal and I set out to create a training curriculum for the Washington State Virtual Reference Project, to be delivered to library staff all over the state. This training curriculum had to address a number of challenges.

- Varied types of libraries are participating in the statewide LSTA-funded project, including small public libraries in rural eastern Washington, large public libraries in urban areas, community college libraries, a law library, and university libraries.
- Staff have different levels of education and experience. Some have the MLS degree, others do not. Some have been providing VRS for a year or longer, others are still in the planning stages.
- The libraries involved in the project are using different software packages to deliver their services (LSSI, 24/7 Reference, OCLC Question Point, some “home-grown” software).

Beginning with the core competencies developed for the project, Daria and I designed Anytime, Anywhere Answers: Building Skills for Virtual Reference. Delivered via the Web, Anytime, Anywhere Answers includes face-to-face and virtual meetings, synchronous and asynchronous learning activities, and individual and collaborative experiences. It is “software-neutral,” intended to be relevant to staff using a variety of virtual reference delivery methods and software packages.

Our goals were to facilitate the acquisition of the core competencies, encourage best practices, support active learner participation, and create an ongoing learning community willing to share experiences with this new service. In addition, we wanted the learners to have fun, so we designed Secret Patron and Virtual Field Trip activities that examine the virtual reference experience from the user’s perspective.

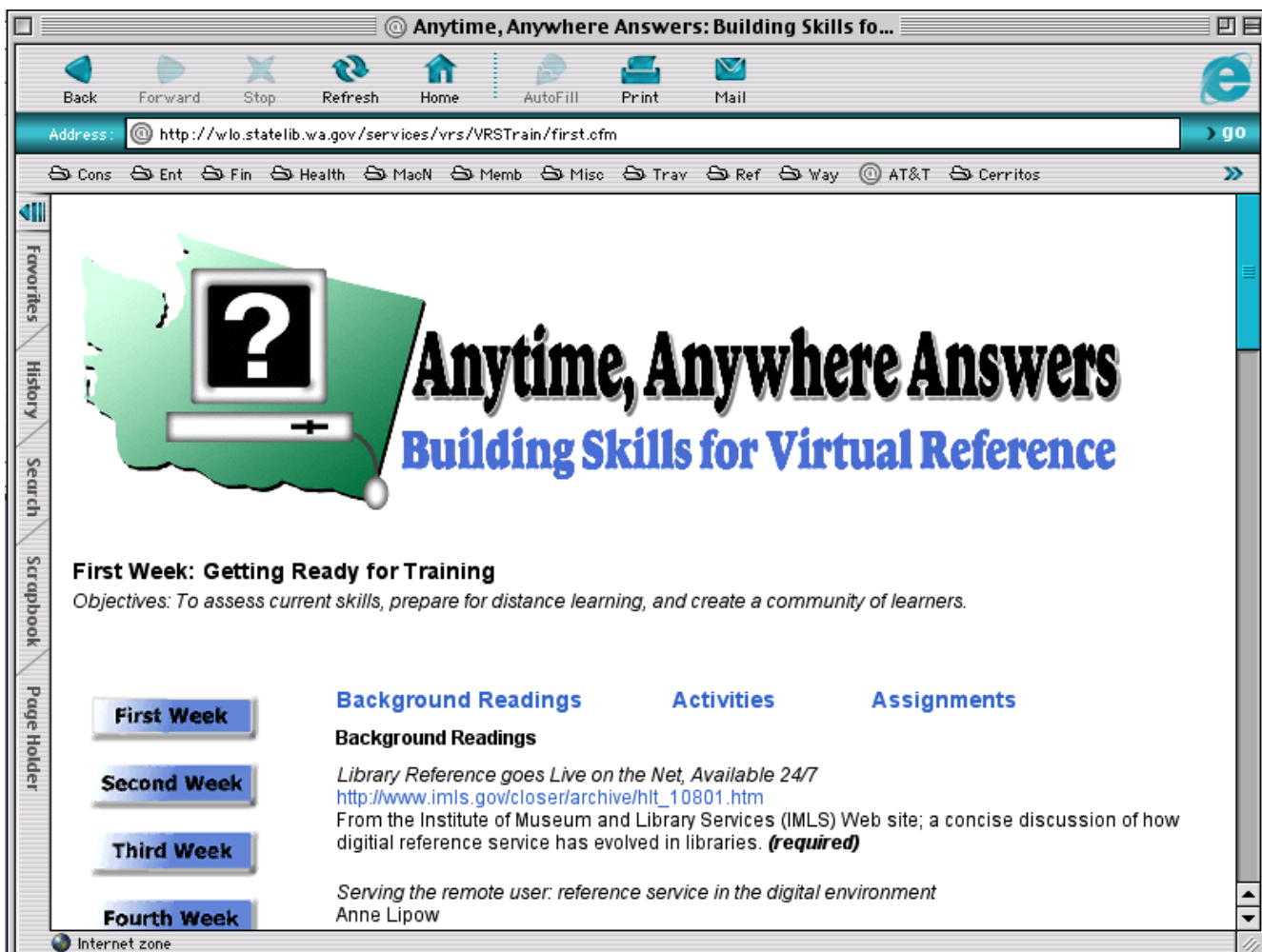
*See Virtual Reference continued on page 7*

We alerted those who are participating in the training that they would find the curriculum to be more learner-focused and less instructor-focused than they may have encountered in their previous training experiences. The training provides sets of resources, activities, and tasks, creating an environment in which library staff can actively explore, discover, and reflect on the skills needed for these new reference services. In this constructivist learning approach, the most powerful learning results from active participation, especially from the conclusions reached and experiences shared by both learners and trainers. We told the trainers that they should ask the right question rather than give the right answer!

Nancy Huling, president-elect of RUSA and one of our trainers, highlighted the potential value of this training for both experienced and beginning VRS staff. She

said: "During my shifts on our Q&A Live service this week, I found myself thinking through much of what we discussed (in the training): How was my reference interview? Did I really know what the user wanted? Was I asking the right questions? It was all right there at the back of my mind, so I'm proof that it works. I think the training will be excellent for those who are just getting started, as well as for those who've been doing it for a while."

Early in October we completed the train-the-trainer sessions for those who will facilitate this training statewide. The actual training began in November, with orientation sessions in Seattle and Spokane. Stay tuned for the next installment in the March issue of the CLENExchange, when I will report on the results of the training and the reactions of the learners!



If you wish to checkout the website, the password and URL can be obtained from the project coordinator, Buff Hirko. Her e-mail address is bhirko@secstate.wa.gov and phone number is 360-704-5206.

CHANGE 7. Article IX: Nominations and Elections

Sec. 1. Nominations. (continued) Other nominations for these offices may be submitted in writing by any ten members ~~before the close of the Midwinter Meeting~~ **one month prior to the deadline set by the ALA Staff Liaison.** Any such nominations shall be included on the official ballot. No candidate shall be nominated whose written consent has not been filed with the Nominations Committee. No candidate shall be nominated who is not a personal member in good standing of CLENE RT at the time of nominations.

Rationale: This change will bring CLENE into agreement with ALA's need for a slate of candidates by September.

CHANGE 8. Article XIII: Parliamentary Authority

Sec. 1. Rules. The rules in the latest edition of ~~Robert's Rules of Order~~ **Sturgis Parliamentary Procedure** shall govern CLENE RT in all cases to which they are applicable provided they are not inconsistent with the Bylaws of CLENE RT or Bylaws of the American Library Association.

Rationale: This change brings CLENE into agreement with ALA, which now uses the Sturgis Parliamentary Procedures.

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# CLENE Midwinter Schedule

American Library Association Midwinter Conference  
January 24-29, 2003, Philadelphia

Friday, January 24	6:00 p.m.-9:00 p.m.	Board Strategic Planning Session (PCC-102B)
Saturday, January 25	9:30 a.m.-12:30 p.m.	Board meeting (COURT Salon II)
Sunday, January 26	2:00 p.m.-4:00 p.m..	Board meeting (DOUB-Concerto)
Monday, January 27	2:00 p.m.-4:00 p.m.	Staff Development Discussion Group (RITZ-Grand BR)

*If you are planning to be in Philadelphia for Midwinter, the members of the CLENE Board urge you to attend any of the meetings listed above. Contributions to the work of the Round Table are very much valued. We hope to see you there. Information about the conference is available at the American Library Association website (<http://www.ala.org/events/midwinter2003>). In case of last minute changes, be sure to check your conference program upon arrival.*

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