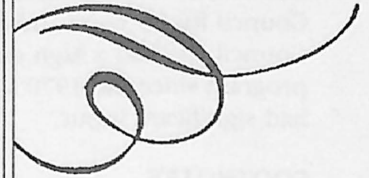


PLANNING AND IMPLEMENTING AN EDUCATION AND TRAINING EVENT: RAPID CYCLE IMPROVEMENT

by Jean Currie and Nora Hardy



The South Central Regional Library Council (SCRLC) not only was the lead agent for the statewide series of workshops on **Continuous Assessment, Continuous Improvement (CACI)**, sponsored on behalf of NY3Rs and supported in part with LSTA funds,¹ but was also an active participant in using the techniques and tools for rapid cycle improvement of some of our own programs.

SCRLC provides services to libraries and library systems in a large area in south central New York State. Our programs and services include resource sharing, education and training, information technologies, and consulting. Because we have a very flat, small organization, our team consisted of all of the Council staff.

Our first CACI effort was to improve the process for creating the annual individual member "report cards" in which we show what each member gave the Council in terms of money, resource sharing, and volunteer hours, and what the Council gave each member in services and money. This product shows the benefits for and return on the membership dues from our 75 members. We followed the various steps of the continuous improvement five block system starting with reviewing and strengthening the Council Mission statement:

The South Central Regional Library Council leads, advocates for, and challenges libraries, promoting collaboration in a changing information environment.

Based on this clarified mission, the SCRLC team conducted an in-depth review of the "Create the annual member report card" process and discovered many opportunities to save time, minimize unnecessary steps, and improve the final product.

Flushed with our success and our excitement in greatly improving the efficiency of our data gathering and production of the report card, we decided to tackle the processes involved in planning and implementing a specific event in our extensive education and training program. Annually we hold about 40 program activities and we thought that we had the processes for managing these pretty well organized.

Using many of the tools and techniques we had learned, we discovered that we could still make major improvements to our event planning and implementation.

Each staff member was responsible for certain steps in the process including selecting a topic, finding funding (sometimes by securing a grant), handling logistics (such as facilities and food), promoting the workshop, registering participants, handling money, hosting presenters, completing post-session activities, and evaluating the workshop. When the team (again the whole staff) flowcharted the entire process, all of us better understood all of the components. In the light of the new shared understanding, a number of improvements were possible. MS Word and MS Excel were being used, but we had not taken full advantage of opportunities to eliminate errors and duplication. We standardized the registration confirmation system and instituted last-minute e-mails for registrants to remind them of their commitment and to notify them of directions and final details. We clarified the paper trail for payments and improved the physical handling of registrations and payments. A policy was developed for participant cancellations and a flowchart for workshop cancellations now outlines the steps for staff to take when a workshop is cancelled due to an emergency (usually due to severe weather).

Some of the tools we used were; a System Map, Brainstorming, Flowchart, (required many discussions and many sticky notes!), and Parking Lot.

This major review and documentation made all the processes run more smoothly. More registrations can now be handled by fewer staff with fewer errors, resulting in more compliments from both participants and from presenters. The SCRLC team still has some ideas in the Parking Lot for future action, such as online registration and a process master for developing grant proposals. The work of reviewing, analyzing, and implementing is ongoing, but each cycle moves our operations closer to the Mission, Vision, and Values we set for ourselves in the System Map, all of which lead to surprising and delighting our customers.

ABOUT THE AUTHORS

Jean Currie is Executive Director and Nora Hardy is Assistant Director at the South Central Regional Library Council, based in Ithaca, NY. Currie has been at the Council for 23 years and Hardy for seven years. The Council has had a high quality education and training program since the 1970's, in which both authors have had significant input.

FOOTNOTES

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