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Co/Lab Capacity, LLC blends first-hand, practical knowledge of libraries with best practices from social science research and human-centered design. That’s why we are trusted by clients stretching from Oregon to Florida, from rural libraries to statewide associations and beyond.
Many people contributed to making this evaluation rich and meaningful. Special acknowledgement goes to Beverly Schwartzberg and Allyson Jeffredo at the California State Library for their leadership and vision. Thank you to the regional networks who shared their meeting time for focus groups, and to the many individuals who attended a discussion, gave an interview, or responded to the survey. This evaluation study would not have been possible without the support of Pacific Library Partnership, the California State Library, Literacy Initiatives, and California Library Literacy Services.
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXECUTIVE SUMMARY</td>
<td>5</td>
</tr>
<tr>
<td>METHODOLOGY</td>
<td>7</td>
</tr>
<tr>
<td>SURVEY FINDINGS</td>
<td>9</td>
</tr>
<tr>
<td>FOCUS GROUP FINDINGS</td>
<td>15</td>
</tr>
<tr>
<td>INTERVIEW FINDINGS</td>
<td>18</td>
</tr>
<tr>
<td>STRATEGY AND RECOMMENDATIONS</td>
<td>20</td>
</tr>
<tr>
<td>STRATEGY AT A GLANCE</td>
<td>29</td>
</tr>
</tbody>
</table>

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From June – August 2022, Pacific Library Partnership engaged Co/Lab Capacity LLC for a training evaluation and needs assessment for Literacy Initiatives and California Library Literacy Services (CLLS). The purpose of the project was to develop a strategy to guide CLLS in effectively providing responsive, relevant trainings to literacy coordinators over the next three to five years.

The evaluation was designed through an appreciative inquiry lens. It sought to help CLLS build on its strengths and understand how to respond to the aspirations of literacy staff. The project took place in four overlapping phases: foundations, data collection, data analysis, and recommendations and reporting.

Using an equity lens, the methods were designed to ensure that voices were heard from the full spectrum of literacy staff and programs across the state. Data collection methods included a survey of literacy coordinators and related staff, focus groups, and individual interviews. Triangulating multiple methods painted a rich picture grounded in literacy coordinators’ diverse experiences.
Overall, the evaluation found that staff across the state are very satisfied with, and appreciative of, the training that CLLS has provided during the challenging pandemic years. It also identified ways that CLLS can build on their success with intentionality in this next phase, as libraries recover and in-person services and trainings resume.

After analyzing the findings from each individual method, the consultant synthesized common themes into a cohesive set of strategies and recommendations for CLLS training over the next three to five years. There are four core strategies, each made up of two to four specific recommendations. The strategies are:

1. **Build on existing virtual successes**
2. **Facilitate in-person opportunities for deep learning and connection**
3. **Focus on immediately applicable topics**
4. **Create guided pathways for ongoing learning.**

These strategies and recommendations honor the deeply impactful work that CLLS has done in recent years – and, through its training, enabled others to do. During an intensely tumultuous time, CLLS wove a lifeline for the people and institutions in the California literacy community. The lessons it has learned and the trust and goodwill it has engendered provide an exceptionally strong foundation for building an inspiring future.
From June – August 2022, Pacific Library Partnership engaged Co/Lab Capacity LLC for a Training Evaluation and Needs Assessment for Literacy Initiatives and California Library Literacy Services (CLLS). The purpose of the project was to develop recommendations to guide CLLS in supporting responsive, relevant trainings to will best support literacy coordinators over the next 3-5 years.

The project included four overlapping phases: foundations, data collection, data analysis, and recommendations and reporting. Data collection methods included a survey, focus groups, and individual interviews.

By comparing data from multiple sources, this evaluation sought to build a rich and full picture of the trends in CLLS literacy coordinators’ training needs. This evidence serves as the basis for recommendations to CLLS for areas of focus over the coming 3-5 years. The ultimate goal is responsive, useful training that will empower literacy coordinators across California to serve their diverse communities.
METHODOLOGY: PHASES

FOUNDATIONS

- Internal stakeholder identification.
- Kickoff meeting with internal stakeholders.
- Review of prior / existing data.
- Engagement plan to identify and solicit input from key external stakeholders.

DATA COLLECTION

- Quantitative survey of literacy coordinators, as well as their direct reports, and their managers or directors
- Focus groups with literacy coordinators. Five focus groups were held: three as part of regional meetings to maximize participation, and two open to all CLLS staff to maximize accessibility and diversity.
- Semi-structured interviews with eight stakeholders, selected to maximize diversity by size of library, level of experience, and role.

DATA ANALYSIS

- Qualitative analysis included inductive coding of focus groups and interviews to identify key themes.
- Quantitative analysis included descriptive statistics of survey responses to understand overall trends and identify meaningful differences among groups (e.g., by size of library, part or full-time hours, or job tenure).
- Comparison of qualitative and quantitative data to identify overall themes.
- Comparison of themes with previously collected data to identify new insights.

RECOMMENDATIONS AND REPORTING

- Development of evidence-based recommendations.
- Development and delivery of final report.
A survey of literacy coordinators, their direct reports, and their managers and directors was open from July 29 – August 11, 2022. It received 87 responses.

The majority of respondents were full-time literacy coordinators. They had a wide range of job tenures and came from around the state. A variety of library types and sizes were represented, with suburban and mid-sized libraries being most common.

The data analysis examined overall trends and looked for meaningful differences across library sizes and types, job classification, job tenure, and full or part-time status. Key findings are summarized here.
WHAT HAVE LITERACY STAFF TRAINING EXPERIENCES BEEN LIKE DURING THE PAST 2–3 YEARS?

Most respondents attended regional meetings quarterly. Coordinators, direct supervisors, and full-time staff attend most frequently.

Most people took trainings monthly or quarterly. Literacy coordinators and new staff attended training most frequently. Staff at large and suburban libraries tended to train monthly, while small and rural libraries trained quarterly.

Respondents sought training from a variety of sources. CLLS was the most popular source, followed by other State Library offerings.

Respondents were most likely to have attended a CLLS Conversation. A majority of respondents had also attended Theory and Practice, Roles & Goals, and ESL.

Almost half of new coordinators have not taken orientation.
HOW DO LITERACY STAFF FEEL ABOUT THE TRAININGS THEY HAVE TAKEN OVER THE PAST 2–3 YEARS?

Overall, people feel very positively about training topics, quality, and the level of support they have received.

People mostly agree that logistics (timing, format, etc) are meeting their needs, though there is some room to improve, especially for part-time staff, non-managerial staff, and directors.

People liked trainings that involved practical application, peer learning, and were interactive.

Secondarily, people liked trainings that featured concrete takeaways and expert presenters, that exposed them to new ideas, and that they could access easily.
SURVEY FINDINGS: PREFERRED TOPICS

WHAT DO LITERACY STAFF WANT TO LEARN ABOUT IN THE NEXT FEW YEARS?

In a multiple-choice question, the topics people wanted to learn about most were:

1. Building community awareness
2. Adult education and literacy
3. Volunteer management
4. Marketing

When asked an open-ended question about training needs, the key themes were similar to the top preferences listed earlier. The top requests were:

1. Supporting learners, such as curriculum and adult education and literacy
2. Recruitment and marketing
3. Program and volunteer management
4. Tutor training and support
5. Diversity, equity, and inclusion

People expressed strong understanding of the foundational program requirements, values and essentials of CLLS. However, they felt somewhat less able to apply them.
HOW DO LITERACY STAFF PREFER TO LEARN?

People anticipate taking training at similar rates to the past few years. Most people plan to attend training monthly or quarterly.

Virtual remains the preferred format for training. This is especially true among rural libraries. Overall, most people prefer this training to happen live. However, part-time staff prefer recorded or asynchronous. One hour is the preferred length.

About half of respondents would like in-person training if it is local or at a conference. Half a day is the preferred length for in-person training.

Most staff want to attend instructor-led classes, peer discussions, and site visits. New staff (0–5 years) are more likely than others to want individual mentoring.

When choosing a training, the factors most important to respondents are:

- Relevance of the topic
- Date and time of the training
- Overall capacity to invest in training
- Travel time or distance (for in person programs)
- Expertise of the instructor

-People want to find out about trainings through the CLLS listserv.
LITERACY STAFF APPRECIATE CLLS

When asked if there was anything else they would like to add, many respondents took the opportunity to share their appreciation for CLLS. They lauded its trainings, its support during the pandemic, and its efforts to find out what people want for the future.

“The CLLS team and the State Library have been extraordinary through these last few years at making a variety of relevant and quality training opportunities available to us – thank you! And thank you for asking what [our] needs are. I think you are already very well dialed in, but appreciate your asking.”

“I appreciate all of the CLLS conversations and support, especially through the last years and pandemic.”

“I appreciate all the work you put into making the trainings you present to us as accessible and friendly as possible. I know it takes a lot of work to put these trainings together for everyone and I just wanted to share my appreciation.”
Five virtual focus groups were held in July and August 2022. Three groups were held as part of a Regional Network meeting. Two additional focus groups were open to any California literacy staff who wished to register. Each discussion lasted approximately one hour. The facilitator also attended a fourth Regional Network meeting for a brief discussion.

The discussions used an assessment model called Strengths, Opportunities, Aspirations, and Results (SOAR). SOAR assessment is rooted in appreciative inquiry. It seeks insight into what has worked particularly well in the past, and how to build on those strengths to reach future aspirations. The following table shows the overall common themes from across all conversations.
## SOAR ANALYSIS

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Opportunities</th>
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<tbody>
<tr>
<td>• The CLLS community and peer learning</td>
<td>• How to redevelop or restart programs post-COVID</td>
</tr>
<tr>
<td>• Specific, relevant, timely topics</td>
<td>• More structured support for new coordinators</td>
</tr>
<tr>
<td>• Virtual programs have made training more accessible</td>
<td>• Strategies for engaging instruction (for staff and tutors)</td>
</tr>
<tr>
<td>• Interactive, hands-on exercises</td>
<td>• Cultural literacy / competence - help understanding the learner’s perspective and experience to meet their needs.</td>
</tr>
<tr>
<td>• Immediately applicable “plug and play” resources</td>
<td>• Training on how to design and run effective hybrid programs</td>
</tr>
<tr>
<td>• Concrete takeaway materials, before and/or after the program</td>
<td>• Offer a mix of in-person, virtual, and hybrid training, including relationship-building formats like site visits, mentoring, and cohorts.</td>
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<tr>
<td>• Support over time – when training is repeated, part of a series, followed with deeper dives, discussion /reflection opportunities, mentoring, collaborative projects, etc.</td>
<td>• Provide more CLLS training directly to learners and tutors.</td>
</tr>
<tr>
<td></td>
<td>• How to do effective outreach, marketing, and community needs assessment</td>
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</tbody>
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# SOAR Analysis

<table>
<thead>
<tr>
<th>Aspirations</th>
<th>Results</th>
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<tbody>
<tr>
<td>Redvelop and restart programs post-COVID, making them efficient and following best practices.</td>
<td>More students, more tutors, more capacity</td>
</tr>
<tr>
<td>Tutors &amp; learners feel a sense of community, help grow the program</td>
<td>Partnerships are multi-way and effective; lead to referrals.</td>
</tr>
<tr>
<td>Increased collaboration with community and partners</td>
<td>We can collect and manage the data we need to tell meaningful stories</td>
</tr>
<tr>
<td>Increased community awareness</td>
<td>Learners and tutors take on leadership roles, raise awareness in community</td>
</tr>
<tr>
<td>Tutors and learners build digital literacy skills, so they can do virtual learning</td>
<td>Learners have effective experiences because staff and tutors know engaging teaching and facilitation techniques.</td>
</tr>
<tr>
<td>Create effective virtual/hybrid learning environments for learners and tutors</td>
<td>Staff and tutors feel more confident</td>
</tr>
<tr>
<td>Consistency and collaboration of programs across the state, for data sharing and warm hand-offs</td>
<td>Staff are more willing to try creative new ideas</td>
</tr>
<tr>
<td>Training pathways, stackable trainings, and a state literacy certification</td>
<td>Staff feel excitement over possibilities instead of stress over limitations</td>
</tr>
<tr>
<td>Ultimate aspiration for all training: successful and well-utilized programs, so learners can accomplish their goals</td>
<td>Statewide benchmarking – there is a standard for what success looks like</td>
</tr>
<tr>
<td></td>
<td>The library and community understand our value</td>
</tr>
<tr>
<td></td>
<td>Our tutors are more successful</td>
</tr>
<tr>
<td></td>
<td>Our learners are more successful</td>
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Eight individual interviews were conducted in August 2022. Interviewees were selected to gather in-depth perspectives from people in a variety of roles, library sizes, and job tenures.
When choosing a training to take, the most important factor is the topic. People want topics that meet a specific immediate need and have clear practical applications. They think CLLS has done a good job of selecting topics over the past few years.

The topic areas people prioritized were rebuilding and managing their program, tutor training (especially digital literacy and cultural competence), learning about their peers’ programs, and basics for new staff.

Once in a training, people learn best from presenters with both subject matter expertise and an engaging teaching style. Interactive, hands-on elements deepen learning.

People want to sustain and increase opportunities to learn from peers in similar situations. In addition to virtual statewide conversations, they want site visits, mentoring, and more targeted conversations with similar size libraries.

People want multiple opportunities to engage with a topic. They want trainings to be stackable, in a series, or repeated, in addition to being recorded. This helps with time/schedule constraints, deepens learning, facilitates implementation, and provides opportunities for coordinators to engage others in their organization.

People want trainings that tutors can take directly.

The main barrier staff face to training is time.

People want virtual training to continue, and to add some opportunities for intensive learning in-person, such as conferences and site visits. They want training for new staff and coordinators to be available on-demand.
Recommendations were generated based on combined findings from the survey, focus groups, and interviews. These are organized into a cohesive direction made of four key strategies. The strategies are:

1. **Build on existing virtual successes**
2. **Create in-person opportunities for deep learning and connection**
3. **Focus on immediately applicable topics**
4. **Create pathways for ongoing learning**
STRATEGY 1: BUILD ON EXISTING VIRTUAL SUCCESSES

CONTINUE THE OVERALL DIRECTION OF RECENT VIRTUAL TRAININGS WHILE ADOPTING BEST PRACTICES.

Participants confirmed that the overall direction of virtual training is strong. Literacy staff continue to appreciate the timely topics, expert and engaging presenters, useful resources, and opportunities to learn from each other. They confirmed that they are able to attend more trainings when they are offered virtually, and that this convenience will continue to be important going forward.

Participants also identified some best practices that have supported their learning effectively. CLLS should consider making these standard practices (or making them explicit when they are already the unspoken default.) These were:

- Virtual trainings should generally last 1 hour.
- Virtual trainings should feature specific, targeted topics and a focus on application. (For a list of high-interest topics, see Strategy 3.)
- Provide takeaways. Send slides and handouts out before the training, and follow up with additional resources or key points. To simplify this process, CLLS could consider developing a simple learner guide template for presenters to complete and provide to participants as a standard takeaway.
- Continue offering a mix of lecture and discussion options.
A consistent theme was that literacy staff learn best from hands-on, interactive training. CLLS might provide guidelines or expectations to trainers encouraging them to include features such as breakout rooms, hands-on exercises, and audience interaction.

**ESTABLISH GUIDELINES FOR TRAINERS TO INCLUDE HANDS-ON AND INTERACTIVE ELEMENTS.**

Continue statewide conversations and support of regional networks. Consider adding targeted conversations or interest groups, so that libraries in similar situations or working on similar initiatives can come together in smaller clusters. For example, libraries of similar size, users of a certain platform, or those developing a new program (as is already being done with ESL) could learn from their peers.

**CONTINUE TO SUPPORT PEER LEARNING AND CONNECTION, WITH TARGETED EXPANSION.**

There was consistent interest in CLLS training that could be taken directly by tutors. (Some people also included learners, but tutors were the more common focus.) Direct training would help build capacity in libraries with few or inexperienced staff. In larger or more established programs, the training could be used for tutor retention and engagement. While recorded training would be helpful, there was also interest in live experiences that allowed tutors to discuss their questions, or that brought together tutors, learners, and staff to participate together on a level field.

**MAKE MORE TRAININGS DIRECTLY AVAILABLE TO TUTORS.**
ESTABLISH GUIDELINES FOR TRAINERS TO INCLUDE INFORMATION AND DISCUSSION ABOUT APPLICATION.

When reflecting on the best in-person training they had taken, people tended to focus on deep-dives like conferences and pre-conferences. They found it important to have opportunities to step away from day-to-day responsibilities and immerse themselves in a learning environment. This may be why survey respondents wanted in-person training to last at least half a day.

People also valued the opportunity to build stronger relationships, or to experience someone else’s program. Site visits, where coordinators go to each other’s libraries in person to observe a program or training, were a popular example. Thus, when restoring in-person training, CLLS should focus on deep learning and connection. Examples include:

- Half-day or full-day intensives
- Literacy-specific conferences and pre-conferences
- Site visit programs
PILOT A STRUCTURED MENTORSHIP AND/OR COHORT PROGRAM FOR NEW COORDINATORS.

New and moderately experienced staff emphasized the importance of mentorship and learning from more experienced coordinators. Especially in small or rural programs, new staff often did not have an experienced guide in their own library. Many reached out to CLLS colleagues for advice or models instead. Some who did not do this and reported feeling alone or overwhelmed. Several people independently proposed the idea of formally matching all new coordinators with mentors. In focus group discussions, experienced coordinators also liked the idea of being mentors. They expressed that the benefit was two-way, because they learned from and were energized by the fresh perspectives of newer staff.
ESTABLISH GUIDELINES FOR TRAINERS TO INCLUDE INFORMATION AND DISCUSSION ABOUT APPLICATION.

One of the clearest findings of this evaluation was that people want to know how to apply the information they are learning. They learned from hearing real-world examples and best practices from instructors or their peers, from having a chance to discuss application in small groups, and from follow-up or series training that allowed them to have ongoing discussions as implementation was taking place. As with the recommendation for hands-on learning guidelines (Strategy 1), CLLS could provide guidelines to encourage presenters to include time and activities related to local implementation.
Rebuilding after COVID. Rebuilding a program or scaling back up after COVID, including:
- Program structure, learner intake, and volunteer management databases.
- Recruitment strategies for learners and tutors.
- Rebuilding partnerships and forming new ones.

Effective, learner-Centered Teaching Strategies. Both staff and tutors need strategies for making classes and tutoring engaging and learner-centered, and keeping learners motivated when they face challenges.

Tutor Training. Staff want both content (adult literacy theory and its application) and structure (how other libraries run their tutor trainings). Keeping content current with new research, best practices, and resources.

Volunteer Management. Managing performance issues, rewarding and retaining volunteers, creating a sense of community among tutors.

On-Demand New Coordinator Orientation. People need this training to be at their fingertips all throughout the year.

Building community and library awareness through targeted marketing to specific audiences, including real-world examples of successful initiatives.

Teaching digital literacy to tutors and learners; identifying resources tutors and learners can use.

Meeting learners where they are. Staff and tutors need to understand the perspectives and experiences of their learners. This includes general DEI concepts like cultural competence, trauma informed service, and power/identity, as well as specific knowledge of how to serve unique populations with high barriers (e.g., immigrants, people with dyslexia).
OFFER INTERRELATED, STACKABLE TRAININGS OR SERIES.

People expressed the value of multiple trainings on the same or closely related topics. The reasons were that multiple trainings deepen or reinforce learning, provide schedule flexibility for those who want to attend live or invite their colleagues, and allow participants to see or discuss how the learning has been applied over time. As appropriate for the topic, CLLS may wish to consider:

- Offering multiple live sessions of the same training.
- Offering trainings in short series, where a single group of people goes through 2-4 sessions in a set progression together.
- Offering trainings that are interrelated or “stackable”, where the topics are complementary but stand alone, so that participants are not required to attend all sessions.
STRATEGY 4: CREATE CURATED PATHWAYS FOR ONGOING LEARNING

BUILD ON-DEMAND TRAINING PATHWAYS ALIGNED WITH PROGRAM FUNDAMENTALS AND/OR FOR SPECIFIC AUDIENCES.

People often expressed a concern that they “don’t know what they don’t know”, or that they felt overwhelmed by the many training options available. They wanted guided pathways to help them understand which trainings would be most useful for them to take. CLLS can align its trainings with its program essentials or coordinator core competencies. They might also tag trainings by audience, such as a pathway for new coordinators or new volunteers.

- Offer all on-demand trainings in CALL Academy, so they are easily findable in a single location. Tag recorded trainings with their associated pathway, so people can easily see the full set of options.
- Begin by piloting a pathway for new coordinator orientation on-demand. The survey found that a significant number of new coordinators had not taken an orientation, and focus group and interview participants frequently shared the need for on-demand orientation for new staff throughout the year.
- Consider creating lists of outside trainings that also align with the pathways. For example, in addition to CALL Academy or CLLS training, it may be helpful to identify specific trainings from ProLiteracy.

EXPLORE THE POSSIBILITY OF DEVELOPING A CERTIFICATION PROGRAM

Once trainings are stackable and aligned with key learning areas, CLLS could consider the possibility of offering a certification. Participants suggested this idea because they felt a certification would lend legitimacy and authority to their staff and work, which would be helpful with their library administration and community. Some also believed it would make them more confident in their own knowledge and skill. One participant suggested that a simple way to support certification would be identifying a set number of trainings or hours that participants would need to take in several categories, and to provide a certificate upon their completion. However, as even a simple certification program would require administrative support, CLLS would need to evaluate if this option would be feasible or desirable.
<table>
<thead>
<tr>
<th>Strategy</th>
<th>Recommendations</th>
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| Strategy 1: Build on Existing Virtual Successes | • Continue the direction of recent virtual trainings.  
• Establish guidelines for trainers to include hands-on and interactive elements.  
• Continue to support peer learning and connection, with targeted expansion of smaller group discussions.  
• Make more trainings directly available to tutors. |
| Strategy 2: Create In-Person Opportunities for Deep Learning and Connection | • For restoring in-person training, prioritize opportunities for focused learning and building connection, such as half-day intensives and site visits.  
• Pilot a mentorship or cohort program for new coordinators. |
| Strategy 3: Focus on Immediately Applicable Topics | • Establish guidelines for trainers to include information, discussion, and/or activities to support real-world application.  
• Focus on topic areas identified as high-interest. |
| Strategy 4: Create Curated Pathways for Ongoing Learning | • Offer interrelated, stackable trainings or series.  
• Build on-demand training pathways aligned with program fundamentals and/or for specific audiences.  
  ▪ Begin with new coordinator orientation.  
• Explore the possibility of developing a certification program. |