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"Takin' It to the Web": Updating Operations Manuals for Today's Techno-Realities

Abstract

This article describes the process of revamping an existing operations manual for the interlibrary loan department at a small, private liberal arts college. It documents how staff met their goals of integrating traditional reference materials and training information, utilizing web-based tools for content creation and delivery, consolidating assessment and evaluation mechanisms, and facilitating updating of content. By incorporating theories of blended learning into the design of the new resource, supervisors were able to shift their existing documentation from 2D to 2.0. Strategies for implementing an interactive training resource and operations manual are provided.

Keywords: blended learning, course management systems, employee training, interlibrary loan, operations manuals

"Takin' It to the Web": Updating Operations Manuals for Today's Techno-Realities

Operations manuals are critical tools for many organizations, providing employees with a foundation that teaches them how to complete the tasks for which they are responsible.

Unfortunately for some organizations, either the tasks themselves or the mechanisms through which employees complete those tasks are constantly shifting. For knowledge-based organizations in particular, this often translates to operations manuals that are outdated shortly after they are updated. In today's highly changing information landscape, how can we continue to provide useful operations manuals for our employees that are relevant, engaging, and multi-functional? This article takes a single case study approach to investigate how theories of blended learning can be incorporated into organizational documentation and training materials. It documents one interlibrary loan (ILL) department's attempts to revamp an existing operations manual with the goals of integrating traditional reference materials and training information, utilizing web-based tools for content creation and delivery, consolidating assessment and evaluation mechanisms, and facilitating updating of content. Although this article discusses these issues in the context of training student workers, the information is equally relevant to (and could easily be adapted for) training full-time employees.

Institutional Snapshot

Linfield College is a private liberal arts college located in Oregon's Willamette Valley, about an hour southwest of Portland. Three academic units comprise Linfield – a residential campus in McMinnville that houses most of the college's academic departments, a nursing and health sciences campus in Portland, and a distance education program administered through the Division of Continuing Education (DCE) that offers courses both on-campus and online. The Jereld R. Nicholson Library is housed on the McMinnville campus and serves both McMinnville

campus patrons and DCE patrons; the Portland campus has its own smaller library facility to serve students and faculty at that location. Both libraries have their own ILL departments and have separate OCLC symbols.¹

On the McMinnville campus (OLC), the ILL department is staffed with 1.27 full-time equivalent (FTE) positions – a Director of Resource Sharing and an Evening Supervisor, who has responsibilities in media services and circulation in addition to ILL. Additionally, the department usually hires seven or eight student workers each semester, who provide an additional 1.75-2.00 FTE. In fiscal year 2010-2011, OLC continued its long history as a net lender, processing close to 8,900 borrowing and lending transactions (see Table 1).

Table 1

OLC Transaction Totals for Fiscal Year 2010-2011

Category	Number of transactions
Lending requests	3,722
Borrowing requests	3,196
Unfilleds	1,308
Items filled locally	673
All categories	8,899

Linfield College has a community ethos of doing more with less. Because of a lean staffing model, OLC relies heavily upon student workers and asks them to learn a great deal to help provide library services. While this has many advantages for both the students and the staff, it also means that library staff members spend a great deal of time on training. Full training of a student usually takes two to three semesters, and because the ILL department at OLC asks students to do so much, supervisors want to make sure students have adequate opportunities to practice new skills before moving them on to more complex tasks.

Rationale

A number of factors influenced the decision to revamp OLC's operations manual. One of the overriding factors was the sheer length of time since the last overhaul – it had been nearly four years since the manual had been updated. During that four-year period, Linfield transitioned to a new email system, a new consortial borrowing system, and streamlined setup of its ILL management software (Clio).² Because of this, entire sections of the manual were no longer relevant. As Sweet (2009) notes, having an up-to-date ILL procedures manual is essential for efficient operations.

The existing manual's print format also presented certain obstacles to usage that staff wanted to remove. First, there was only one print manual in a three-ring binder. If multiple individuals needed to consult the manual at the same time, they needed to wait until the previous person had finished. Additionally, because the manual was not regularly updated, new information often made its way into the manual (if it made it at all) in the form of sticky notes on various pages. Although this "quick and dirty" solution provided a temporary stopgap to preparing a full-scale update, it also posed an additional obstacle – student workers were often unsure whether these undated notes reflected the most current information. The ILL staff wanted a format that would make updating less cumbersome and that would also allow for simultaneous access by multiple users, regardless of location.

Pedagogical considerations also factored into the decision to revamp the operations manual. Historically, Linfield's operations manual had served a dual role as both a reference resource and a de facto training resource when supervisors were unavailable for face-to-face training. The ILL staff wanted to preserve that dual role, which meant design considerations needed to take those two functions into account. Ideally, staff wanted to use blended learning

techniques that would integrate instruction, reference, and training exercises in one space to supplement the department's in-person training. ILL staff also wanted to be able to take advantage of web-based tools in both content creation and delivery, including mechanisms for evaluation and assessment that had previously been excluded from the existing documentation.

One final consideration emerged as planning was underway. In April 2011, the author (who was the Director of Resource Sharing at the time) was offered and accepted a faculty position in collections management at Linfield, slated to begin in July 2011. As such, there was a degree of urgency to update the operations manual in order to provide an accurate picture of current policies, procedures, training, and assessment materials for the incoming Director of Resource Sharing. Because content creation continued through July, student workers were able to use and evaluate only a small portion of the new training resource and operations manual. However, the ILL staff knew they would gain additional feedback from student workers during the fall semester once a new Director of Resource Sharing had been hired and had updated the training resources to reflect any modifications to policies or procedures.

Training Concerns: Repetition, Coordination, and Infrequency

Historically, training for ILL student workers at OLC has meant numerous one-on-one (or occasionally one-on-two) time-intensive sessions with either of the supervisors. Repetition, while useful for the individual student workers as a learning technique, becomes a major concern for supervisors who would prefer to make more efficient use of their time. The start of the academic year is an especially repetition-filled training period; for instance, it is not unusual for supervisors to train different student workers on the same process at three different points during a single day. Finding a way to provide the repetition students need in order to learn and become

confident in tasks, while at the same time reducing the amount of time supervisors spent on repetitive training, was a high priority.

In addition to issues of repetition, the ILL staff knew they needed to consider the need for coordination when designing a new operations manual. Students' schedules are often irregular, and a certain amount of flexibility (including scheduling them in split shifts or only scheduling them a few days a week) is usually necessary to accommodate their classes and other co-curricular commitments. Additionally, the Evening Supervisor works a swing shift, while the Director of Resource Sharing works a typical 8 AM – 5 PM shift. Because the two supervisors' work schedules only overlap for a couple of hours per day, constant coordination is needed. The Director of Resource Sharing and the Evening Supervisor must coordinate how to track progress (even when one of the supervisors has not had direct contact with a student worker) as student workers learn their position responsibilities. For the ILL supervisors, this means determining who has been trained to perform which tasks, which students need additional supervision in particular areas, communicating changes in processes and new information, and scheduling evaluation meetings.

Beyond repetition and coordination, a third training concern the ILL staff hoped to address with a revamped operations manual was infrequency. Because student workers can only work a limited number of hours each week during the academic year (as set forth in their federal or campus employment agreements),³ a number of challenges arise. Depending on when student workers are scheduled to work, they might not be exposed to all the daily processes in the ILL department. For instance, because of a class schedule, a student worker might work only in the early morning; since mail delivery occurs only in the afternoon, this student would never be exposed to that set of tasks. Yet, one of the keys to keeping the ILL department running

smoothly is having all workers cross-trained in all the major processes. Lack (or infrequency) of exposure to particular tasks is therefore a primary training concern. However, scheduling is not the only contributor to infrequency-based training challenges. Some ILL tasks simply do not occur as often as others. Relying on live examples to demonstrate infrequent processes (such as how to process international loans or retry requests) often proved to be problematic – in many cases, the student worker who needed to be trained on the process would not be working when the example presented itself. The supervisors would then need to weigh whether a request should be delayed for training purposes or whether it needed to be processed promptly to ensure a high level of service.

The ILL staff recognized these training concerns were real but not insurmountable hurdles to overcome. As planning for an operations manual overhaul progressed, it became clear that a different approach was needed. Combining the strengths of a traditional, ready-reference operations manual with the advantages of one-on-one training would necessitate a shift from 2D to 2.0.

2D to 2.0: A Blended Learning Approach

As stated earlier, the ILL supervisors wanted to use blended learning techniques to integrate instruction, reference, and training exercises for the student workers. What is a blended learning approach? Graham (2006), echoing the work of others,⁴ explains that blended learning systems “combine face-to-face instruction with computer-mediated instruction” (p. 5). Allan (2007, p. 2) enumerates a number of reasons for developing blended learning programs, including increased accessibility, engagement, and relevance, and reduced time needed for face-to-face activities. Allan also notes the benefit of providing training opportunities that are not only flexible but also directly related to work experiences; in this way, individuals are given realistic

and practical opportunities to make learning independent and useful. Graham, Allen, and Ure (2005) state that increases in pedagogical effectiveness, convenience and access, and cost efficiencies are three benefits that can be realized by utilizing blended learning techniques. Although most research on blended learning has focused on educational environments rather than the workplace, supervisors can incorporate many of the principles of blended learning into workplace training and attain many of the same benefits that educators see.⁵

Shifting information that had previously been disseminated via in-person training sessions or informational emails to an online content management system (CMS) achieves several goals. By reusing existing locally created content and/or by recycling or appropriating portions of externally created content, ILL staff can realize efficiencies and reduce the amount of time spent on delivering the same content each year. For instance, all library student workers use the same time card system, regardless of the department in which they work. Since every single student worker needs to know this information, it makes sense for the library to develop training information explaining how the system works. However, because the circulation department had already developed this training information for its student workers in a previous year, the ILL department was simply able to reuse that existing content and add it to the CMS with very little effort. Leveraging content produced by other departments at an academic institution, by partner libraries in a consortium, or that is freely available on the Web is an excellent way to reduce the amount of content that must be produced locally. Adding this kind of content to a CMS also frees up much of the time that supervisors would have spent on repetitive training.

Another advantage of shifting content from in-person training sessions to a CMS is consolidation of information. Aggregating content in one location makes it easier for both supervisors and student workers to locate information. Using a CMS for delivering training and

reference content also simplifies joint management and updating of that content. In the case of Blackboard[®], the CMS used at Linfield, multiple individuals can be designated as instructors for a course, meaning each instructor is able to create, modify, or delete content. Sharing access to and responsibility for content management among supervisors can help relieve some of the potential burden if one person is solely responsible for maintaining a training resource and operations manual.

Determining how to structure the training resource and operations manual took considerable time. The existing operations manual was organized topically in five main sections: reference, lending, borrowing, mailing procedures, and troubleshooting. The ILL supervisors wanted to retain some of this structure, but they also wanted to group information about specific software together and improve cross-references to appropriate materials in other areas of the training resource and operations manual. As such, ILL staff created individual content areas for each type of ILL software and for the integrated library system used by OLC. Additionally, ILL staff created content areas for both borrowing and lending, as well as several other areas that straddled both borrowing and lending transactions.

Case Study Specifics: Interactive Learning vs. Reference Materials

Once the ILL staff decided to utilize a CMS as the backbone of a new training resource and operations manual and had decided on the basic architecture, the focus shifted to designing content. Blackboard[®] offers the option for instructors to upload existing content as standard files (documents, spreadsheets, media files, and so forth). It also has a number of embedded tools to help create content within Blackboard[®], including a fairly easy-to-use WYSIWYG (what-you-see-is-what-you-get) graphical interface for textual content. However, the standard text editor within Blackboard[®] can be difficult to work with when designing pages which need to be

formatted precisely or which contain embedded images or other rich media files. Additionally, the HTML editor does not always perform as expected. Because of this, the ILL staff looked at additional options for creating interactive training content.

Linfield College had already purchased an institutional license for Softchalk™, an e-learning authoring tool that allows users to create interactive web content using a WYSIWYG interface; no prior knowledge of programming or HTML is needed. Content created via Softchalk™ can be shared via traditional web pages, course management systems, external media devices, or directly through various learning object repositories. A plug-in for Blackboard® (installed by the local Blackboard® administrator) allows Softchalk™ content to be directly managed within the Softchalk™ software. Softchalk™ also complies with web accessibility standards and allows extensive descriptive and administrative metadata to accompany each file.

One of the advantages of Softchalk™ (which is SCORM-compliant) is that it allows content to be “chunked” easily into meaningful segments so it can be shared and reused by other users. Because learners absorb content more readily when it is in smaller chunks, Allan (2007) and Smith (2008) both advocate chunking as a way to create additional learning points. Softchalk™ also has a number of built-in-tools that allow users to add context-specific interactivity to web pages. Smith (2008) notes that interactivity provides an opportunity for students to reinforce material they have just learned in a more passive manner; additionally, the ability to repeat either the passive learning or the interactive component increases the ability to retain material. Although Smith’s argument refers to an educational environment, it stands to reason that students are also more likely to retain training information when context-specific interactivity is employed in a workplace environment.

The ILL staff decided to use Softchalk™ to design content that could directly benefit from added interactivity. Training content that could stand alone as pure reference material and that would not see additional benefit from interactivity was created directly in Blackboard®. Depending on the type of interactivity desired, ILL staff took advantage of a variety of self-check and comprehension question styles, hot spot flowcharts (where hovering over the hot spot gives the user additional information), ordering activities (to reinforce the proper workflow for certain processes), timelines with pop-up text annotations, embedded media files, and other tools to create a rich learning experience for student workers.

Case Study Specifics: Wikis, Videos, and Other Tools

Linfield's ILL staff chose to employ a number of different types of tools to create training content and reference material for the new operations manual. In some cases, the decision to utilize particular tools arose from specific problems that needed to be addressed. For example, one problem the ILL staff wanted to resolve was how to keep track of patrons who read multiple languages. When patrons submitted requests for non-English language materials, the previous practice had been to email the patron to confirm the ability to read the other language. ILL staff knew the identities of some patrons who were able to read other languages, but there was no systematic method for sharing this information with all student workers. Without a tracking method, patrons were often emailed multiple times during the course of a semester, resulting in duplicated effort. Even when email responses were saved in the department's shared inbox, it could be cumbersome to locate them quickly. When ILL staff recognized the scope of the problem, the solution became fairly obvious – build a wiki accessible to all student workers and supervisors and track language information there.⁶ The ILL staff did create a wiki prior to developing the new operations manual, but the chosen wiki tool was occasionally unreliable.

Because of this, and because streamlining training and reference resources would be advantageous, the ILL staff decided to recreate the wiki within the Blackboard® CMS.

A less context-specific problem also required a solution: What was the best way to introduce and reinforce training information that contained essential visual components with all student workers? The ILL staff decided to take advantage of short videos and screen captures. OLC's circulation department had developed a series of training videos and screen captures, most of which had been originally produced using Adobe® Captivate®. These short videos (usually between one and two minutes in length) introduce student workers to the library's integrated library system, as well as to basic library policies and procedures. Although not all the previously created content was directly relevant for the ILL student workers, a number of videos were appropriate for ILL training and could be recycled directly into the CMS. The ILL staff also noted areas in which additional content could be created; for instance, a short video (or even an audio podcast) might be useful to provide a walking tour of library collection locations or the ILL department's work area.

Beyond addressing the immediate training concerns, ILL staff also took the time to brainstorm how they might use other tools when developing future training materials. In addition to using wikis and videos or screen captures, other tools (of both the Web 2.0 and office productivity variety) can be incorporated into online training resources. Private blogs can be used to update employees about technology issues, help multiple student workers keep track of progress on long-term shared projects, and can provide a means for worker self-evaluations. Many presentation software programs allow for voiceover annotation; ILL supervisors might create a quick set of presentation slides, using images and voiceover, to demonstrate common tasks like packaging materials for shipping, or filling out customs forms. Even email software

can be leveraged; for instance, the ILL staff at OLC uses templates for commonly sent messages to ensure consistency of information and to minimize the time needed to respond to most emails from patrons and partner libraries. Because the templates live in a shared folder in the department's email account, all ILL personnel have access to the messages. Subject lines make it easy for student workers to know which template to choose. Although Linfield's ILL staff has chosen to use some tools (such as email templates) that reside outside the CMS, the training resource and operations manual does include documentation on their usage.

Case Study Specifics: Assessment

The initial decision to use a CMS for the training resource and operations manual was influenced in part by the ILL staff's desire to incorporate assessment tools beyond those included in the interactive web pages. While the supervisors did not specifically need a numerical-based grade book to track the student workers' progress, a mechanism for monitoring progress was indeed desirable. Prior to designing the new training resource and operations manual, ILL supervisors used a hard-copy rubric to note when students had been trained on particular processes. Although this method worked relatively well, the ILL staff preferred to incorporate a similar progress report into the CMS to streamline operations and to take advantage of associated statistical information that could be generated by using the grading feature within Blackboard®.

Linfield's ILL staff had a second reason for wanting to consolidate employee progress reports into the CMS—to aggregate a self-evaluation assessment and testing mechanism with the student workers' progress reports in order to streamline the employees' annual reviews. OLC conducts annual performance evaluations of all student workers. In previous years, one portion of the performance evaluation had been based on the ILL training rubric, which addressed specific ILL processes and skills, while a second portion had been based on a form used by other

library departments to address more general work behaviors (e.g., attendance, communication, and professionalism). During some years, a separate skills-completion quiz would also be administered (in hard copy), scored, and then discussed as part of the review.

The ILL staff thought it would be fairly straightforward to transfer some of the existing assessment mechanisms into Blackboard®; both supervisors had previous experience using the test feature in Blackboard®, and they knew the scoring features could be helpful in identifying areas where additional training was needed. Because the ILL training rubric had been updated within the previous year, the supervisors did not think a separate skills-completion quiz was warranted. Rather, they chose to administer a self-evaluation that enabled the student workers to offer their own perspectives on their progress. The self-evaluation would then be used in conjunction with the information from the ILL training rubric and the general work behavior performance evaluation at the student workers' annual reviews.

Utilizing the CMS for managing assessment had both advantages and disadvantages. First, the ILL supervisors realized they had chosen a poor tool for the students' self-evaluations. Rather than using the test tool in Blackboard®, they chose the survey tool. While the survey tool was easy to use for building content and provided clear instructions for the student workers when completing their self-evaluations, it did not allow for easy data extraction and comparison. Second, using the grading tool within Blackboard® to track skills completion was somewhat cumbersome. A lack of flexibility in how the grade book could be displayed visually limited the usefulness of the tool for quick reference. However, the statistical reporting features associated with the grade book (each skill from the ILL training rubric had become an assignment in the grade book) offered relevant information to identify gaps in training for individual student workers and for the employee group as a whole. Additionally, Blackboard® has a feedback

mechanism (not used by OLC during spring 2011) built into the grade book. This feature enables the ILL supervisors to provide feedback (easily visible by the student workers) about a particular skill, while simultaneously giving ILL staff the option to maintain internal notes about specific skills (visible by the supervisors alone). Moving forward, the ILL staff will need to determine whether the lack of flexibility in the grade book display outweighs the benefits of the statistical reporting features.

The final assessment issue, as mentioned earlier, relates to evaluation of the new training resource and operations manual itself. Because the student workers are intended to be the primary users of this resource, their feedback is essential to evaluate the usefulness of the tool. Anecdotal evidence from conversations with the spring 2011 student workers indicates the training resource and operations manual is beneficial for them. For instance, student workers have said both the short video tutorials and the reference and training materials that address less common processes (such as how to fill out a customs form when sending international loans) are particularly useful and enable them to work more independently. Additionally, in their self-evaluations or during their annual reviews several student workers addressed the need for repetition as a training technique. Student workers explained they often need exposure to a task several times before they can comfortably complete that task. This feedback suggests the training materials with built-in interactive components, which allow students to practice tasks multiple times, will be well-received supplements to OLC's one-on-one training. As a result of the anticipated change in ILL management systems in summer 2012, however, much of the existing content will need to be revised or replaced with new information and interactive web pages. Therefore, it is unlikely that a formal assessment of the training resource and operations manual (such as a survey or a focus group) will occur until that transition is complete. Nevertheless,

more informal periodic assessments could be conducted in the interim to provide constructive feedback for the ILL staff.

Case Study Specifics: Strategies for Implementation

In the process of creating the new interactive training resource and operations manual, the Linfield ILL staff compiled a number of strategies to guide content creation which other interlibrary loan departments might also find useful.

- Pick the low-hanging fruit. Identify what reference information, policies, or processes would be enhanced by interactivity and start there. Beginning with the most obvious content creation candidates allows the focus to be less about substance and more about how content is created. Once familiar with how to effectively add interactivity to low-level content, staff will be ready to create content for more complex processes. Recognize, however, that some processes may be too complex to translate effectively into an interactive training resource and operations manual. In those cases, it is perfectly acceptable to include a skeleton outline of the process and refer employees to more in-depth in-person training.
- Match the tool to the desired outcome. It is not necessary to create all content with one tool; some tools are simply better suited to enhancing particular kinds of content. Take advantage of the variety of e-learning authoring tools available and choose the tool that is most appropriate for the task.
- Not every piece of content has to have an interactive component. Just because it is possible to add interactivity to content does not mean users will benefit from that interactivity. Make interactivity count.

- Plan, plan, plan! Figure out the desired outcomes from a training resource and operations manual in advance of building one so it is easier to determine the appropriate software solutions that will be needed. Similarly, decide the outcomes for individual pieces of content before deciding how to build them.
- Chunk content into small enough pieces so it can easily be reused. Keep in mind limits on the users' capacities to pay attention to and absorb new information. Content that is created in smaller chunks will also be easier to update when necessary.
- Revise, update, and add to the resource on a regular basis to ensure the information remains current. Because supervisors want their employees to be following the most up-to-date procedures, building training and assessment components into an operations manual gives supervisors an incentive to keep materials current.

Conclusions

Documentation that outlines local policies and procedures is one of the most useful types of information to be able to share with current and future employees. Although training resource and operations manuals can be time-consuming to create, the benefits that can be realized are worth the effort. For Linfield College, the decision to revamp the existing operations manual and transform it into an interactive training resource integrating traditional reference materials, training information, and evaluation mechanisms made sense in the face of an impending personnel change. Assessment of the training resource and operations manual is still needed to ensure that student workers are getting the most out of this blended learning experience; that feedback will certainly help inform future versions of the resource. With the groundwork now firmly in place for the new Director of Resource Sharing, and with the knowledge that chunking and repurposing content can facilitate maintenance of a training resource and operations manual,

the ILL staff at OLC is primed for its transition to a new ILL management system. No longer constrained by 2D thinking, the ILL supervisors have the tools at their disposal to document changes, create new training materials, and integrate evaluation mechanisms as they create the next iteration of OLC's training resource and operations manual.

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Footnotes

¹ While the two libraries work closely in many respects, because of the difference in request volume, request types, and number of student employees, each library has historically maintained its own processing procedures and created its own training materials. As such, this case study only reflects the McMinnville campus and should not be interpreted as representing the whole of interlibrary loan practice at Linfield College.

² As of this writing, OLC is planning to switch ILL management systems from Clio to ILLIAD during summer 2012, which will necessitate a major overhaul of the training resource and operations manual. The Evening Supervisor plans to update the resource once the migration to ILLIAD is complete.

³ Nicholson Library is only able to hire students who have either federal work-study or campus employment. Campus employment is a Linfield-funded program similar to the federally funded program. (<http://www.linfield.edu/financial-aid/employment.html>)

⁴ For example, refer to Clifford & Thorpe (2007, p. 53), Rooney (2003), and Ward & LaBranche (2003) for similar definitions.

⁵ See, for instance, Rabak & Cleveland-Innes (2006) and Bryce, Choi, Landstrom, & LoChang (2008).

⁶ For a variety of creative uses for wikis in an ILL department, refer to Alder (2008), Kopchok (2007), and Von Berg (2010). Steiner and Glogowski (2007) also document multiple ways to use wikis, including as training manuals.