

**Branching Out**  
**Overview of evaluative findings**  
**Briony Train and Professor Judith Elkin**

## Foreword

'Reading changes lives'. How many times has that simple statement been used by librarians, educationalists, writers, and most importantly, readers? Alex Glasgow, Tyneside folk artist of the 1960s, echoed the views of many when he said in a *Who's Who* entry, that the greatest influences on his life were reading and Gateshead Public Library.

Public librarians everywhere, in a welter of management speak, ICT and strategic plans, possibly may just have forgotten the importance of reading and its development to their core activity of improving access to knowledge, ideas and opportunity. In an era of quantifiable performance indicators, and the importance of outcomes rather than outputs, it is perhaps understandable that a skill possessed by over 90% of the population may appear relatively mundane.

Over the last twenty years as public service budgets came under increased pressures, and opening hours and the bookfund were seen as comparatively soft targets for reduction, it is understandable that reading development did not receive the attention it deserved. Understandable, but not forgivable.

Despite the problems, many librarians tenaciously retained a sense of mission for reading development, both in terms of services to the user, and in relation to the stock on the shelves. Pressures to perform in terms of book issues led many to narrow the choice of titles available, concentrating on the popular. Consequently, a significant number of people in our communities considered that the local library had nothing to offer their particular reading interests and lifestyle.

Thankfully a number of public librarians retained a commitment to that enduring notion of reader development. Tom Forrest, formerly Director of Cultural Services with Oxfordshire, stimulated a renewed commitment among many to put reading development back on the agenda. Branching Out was the result. This evaluation records an initiative that has already changed the way many a library authority views its public services, particularly in relation to staffing, stock selection and promotion.

Many lessons have been learnt. The most important that reader development is not an optional extra, but must be integral to the ethos and direction of every public library service. The successes far outweighed any problems. But the challenge is now to take forward the lessons learnt and engage actively other relevant agencies, particularly in the education sector and other cultural organisations.

'Reading changes lives', most certainly. Reader development can change local libraries and their relevance to the broader local community.

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## 1. Introduction

Branching Out was a national reader development initiative from the Society of Chief Librarians, funded by the Arts Council of England to run for three years until September 2001. The project was directed and managed by Opening the Book Limited, from which the 34 participating librarians<sup>1</sup> received a comprehensive training programme in which they worked together in many areas of reader development work including, for example:

- selection policy and methods
- targeting promotions
- working with reading groups
- fundraising.

From the beginning of the Branching Out project, the University of Central England in Birmingham (UCE) was the academic partner. The evaluation of the initiative was conducted by the Centre for Information Research (CIRT) at UCE, with Briony Train and Professor Judith Elkin as the research team. The main objectives of the evaluation are listed below:

- to investigate the personal and professional development of the participating librarians
- to investigate the extent to which the work of the project had an impact on colleagues and senior managers both within and beyond participating authorities
- to investigate the extent to which the outcomes of the project affected reader development service provision
- to conduct a longitudinal study (through observation and interview) of two of six projects devised during the second year of the initiative.

This document is an overview of key findings of the evaluative process. However, there are numerous articles and reports outlining in more detail elements of the evaluative research undertaken by UCE for the Branching Out project. These are listed in full in Appendix 3, and readers wishing to have full details of the research should consult these documents.

## 2. Evaluation methodology

### 2.1 Reader development

The Director of the reader development agency Opening the Book defined the term 'reader development' as:

*...active intervention to open up reading choices, increase readers' enjoyment and offer opportunities for people to share their reading experiences. (Van Riel, 1998).*

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<sup>1</sup> There were 33 places on the scheme plus a librarian from the National Library for the Blind; one place was shared by two authorities giving a total of 34 librarians.

When reading this definition it becomes apparent that a reader development initiative could not be comprehensively evaluated using only quantitative measures.

Many performance measurements are limited in what they can evaluate, as the quality or impact of any service on human beings – staff or customers – is difficult to quantify. As a rule, local authorities undertaking a piece of research or project-based work have not tended to have sufficient time, financial support or general resources with which to evaluate their work apart from collecting basic quantitative data pertaining to, for example, issue statistics or audience figures.

The Branching Out initiative, however, was a sufficiently large-scale project to require long-term evaluation. As a major focus of this evaluation was the impact of participation on the librarians themselves, the research team realised that ‘traditional’ quantitative performance measures would be inadequate. Clearly, a thorough evaluation of a three-year project must be more than a simple ‘snapshot in time’, but should develop as the project develops, changing its methodologies where appropriate in line with changes to the project.

For ease of reference, the following is a summary of key examples of data collected by UCE throughout the three years of the Branching Out initiative:

<b>Evaluative method</b>	<b>Dates used</b>
<p><b>Observation:</b></p> <p>Attendance at and observation of:</p> <ul style="list-style-type: none"> <li>• core training days of years 1-3</li> <li>• planning meetings of Open Ticket and Unclassified year 2 group projects</li> <li>• selected training sessions of the above projects</li> <li>• selected project consultancy days.</li> </ul>	<b>Throughout the project</b>
<p><b>Learning Reviews:</b></p> <ol style="list-style-type: none"> <li>1. The initial exercise</li> <li>2. Agents of change</li> <li>3. Project-based work</li> <li>4. Best Value, regional networks, personal changes</li> <li>5. The overall impact of Branching Out</li> </ol>	02.99 01.00 08.00 03.01 08.01
<p><b>Skills audit:</b></p>	02.99 08.01
<p><b>Year 2 group projects:</b></p> <p>Evaluation of the impact of participation in Year 2 group projects on participants</p>	Throughout Year 2

<b>Evaluation of the views of Heads of Service:</b>	
Cultural change, advocacy, staff training, future planning	07.00
Overall impact of the project	08.01

**Figure 1. Key examples of evaluative data collected for Branching Out**

Data such as these have provided the participating local authorities with a unique opportunity to have ready access to evidence of the impact of those hitherto 'intangible' elements of their work.

### 3. Skills Audit

In February 1999, UCE distributed a skills audit to each of the Branching Out participants, in order to enable them to assess their own skills and competence in the five areas considered by the research team to be most relevant to the work they would be carrying out over the remainder of the project, namely:

- book-based skills
- promotional skills
- ICT
- general management
- research and evaluation.

To summarise key points, the audit revealed that almost all participants felt that they needed further training in each of these five areas, and there was a notable lack of confidence in ICT and promotional skills in particular. At the same time, most felt that they had good networking and time management skills, both clearly essential for the work they were expected to do<sup>2</sup>.

To provide evidence of staff skills developed throughout the project the research team undertook a second audit towards the end of the third year. These results were clear: almost all participants recorded an increase in their competence or skills in each of the five areas. Only two librarians described their level of competence as 'low' (i.e. 0-3 out of 10), and this was in just one area. And as one commented:

*Generally speaking, where I have marked very low on the scale, this is because I haven't been involved in these activities, or only on a very basic level...given the opportunity to put these things into practice, I feel we have been given good training and theoretical information to help build these skills.*

A number of respondents indicated that their increased competence was directly attributable to their participation in Branching Out. One said, for example:

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<sup>2</sup> For a full depiction of participants' response to the skills audits refer to Figures 1 and 2.

*Some of the increases in my skill levels are as a direct result of becoming a Senior Manager and thus being involved on a daily basis in writing policy documents etc. However becoming a senior manager was largely as a result of being the Branching Out representative, as this gave me the confidence to apply and be successful...*

## **4. Year Two projects**

Work conducted in the second year of Branching Out was largely project-based, during which the participating librarians worked in one or more of the following groups: Open Ticket, Book Forager, A Touch of..., Book of the Month, Loud and Proud and Unclassified. The UCE team chose to evaluate two of these projects, Open Ticket and Unclassified.

### **4.1 Open Ticket**

Open Ticket was a high-profile promotion of world literature developed by a group of six Branching Out librarians in commercial partnership with Book Communications Ltd. and Opening the Book. It was the first of the Year Two projects to be launched.

The UCE evaluation of the project was devised in order to take into account the developing impact it had on the many parties involved. Examples of the elements included are listed below.

#### **Observation:**

- of project planning meetings
- of training programme development meetings
- of the training sessions themselves.

#### **Obtaining feedback:**

- from Branching Out trainers: before and after delivering training
- from trainees
- from Opening the Book management
- from senior management
- from project partners, including future plans.

Evaluation of this promotion was conducted throughout the year and, using the data collected during this period, the UCE team was able to detect changes in skills and confidence levels on the part of the librarians. For example, although each member of the group had delivered some form of training before working on the project, this was his or her first experience of helping to devise and deliver a complete training package to other library staff in their authority and beyond. At their presentation at the Branching Out Conference in March 2000, members of the group listed three things that members felt they had learned during their work on the project:

1. a range of different learning styles and how to incorporate these into training sessions

2. the skills appropriate for designing successful training
3. the difference between training and simply presenting information.

Brief qualitative interviews with each member of the group after these planning sessions confirmed how useful they had found them, and how they had helped to reduce feelings of stage fright. Comments included, for example:

*...it was a different way of training...not just imparting information but designing the day, controlling the group, leading feedback.*

*I thought that everything we did on the day had a practical application and had developed my thinking about training.*

The training days themselves went very well, and although the evaluation team was not present at each session, members of the group provided positive feedback, for example:

*I think it went very well...it was varied in content and I felt everyone was participating and seemed to be enjoying the experience.*

*The whole group participated throughout the day and were enthusiastic. I felt some attitudes towards contemporary fiction were changing to be more responsive and open...I'm keen to have another go.*

Did those librarians *being* trained agree with this positive evaluation? Comments they made on training evaluation forms do seem to confirm the overall success of the programme:

*I will feel more confident in convincing my staff that this genre is accessible.*

*I discovered my own ignorance and prejudice against it [i.e. world literature] and that the best way to promote it is to read it yourself.*

Almost all trainees appreciated 'changing flavours', surely the only librarian training exercise to date to involve bags of fruit and vegetables! In this exercise, participants were encouraged to think about different perceptions of what was foreign, exotic or closer to home, using fruit and vegetable as a vehicle but then moving on to world literature. Their responses to the exercise included:

*The vegetables were a good fun way of getting people talking and got the day off to a good positive start.*

*It was good as an icebreaker and a clear way to illustrate the rest of the course.*

For those training the trainers, the Open Ticket method of delivery was very effective:

*With the accent on participation rather than information giving, and the emphasis on learning being a voluntary activity, the participants were equipped to consider how they might deliver other information in the future. It*

*also allowed for a flexibility in delivery and an ability to allow the training sessions to adapt to different learning groups.*

The success of this one-day training programme was such that one trainer changed her view of the shorter session, and said that she learned 'that just one day of well designed training can have a much greater impact than I had previously thought.'

The Open Ticket promotion has been successfully running since its launch on World Book Day in 2000, and the response from heads of service has been very positive. Aspects of the promotion that they referred to in interviews conducted by the research team in August 2000 included cascading, book issues, creative displays, staff enthusiasm, high quality promotional events.

Finally, the project partners, Book Communications Ltd., summarised their perception of the project as follows:

*...the whole process ran smoothly and, in our opinion, was a model example of how to work with partners...working with the Branching Out librarians was equally rewarding. They taught us a lot and were always well briefed, positive and most importantly reliable.*

Further evidence of the success of this project in this respect is the fact that a second Branching Out project was developed in partnership with Book Communications, a promotion called 'Future Tense' which aimed to ease readers into the science fiction genre.

## **4.2 Unclassified**

Unclassified is an approach that aims to develop audiences for contemporary writing in large libraries, by bringing new books out of the a-z or genre categories and making them both accessible and attractive to browsers.

Quantitative data collected suggested that Unclassified is an extremely successful promotion in terms of issues generated. Taking one authority as an example, on average 58% of the 1000 titles purchased for the promotion were on loan at any given time. In a standard a-z sequence of fiction titles, the same authority estimated that 30% of stock would be on loan.

Qualitative data collected for the evaluation of Unclassified provided a useful indication of the response of group members, the project partner and senior managers to the value and impact of the promotion.

A notable observation would seem to be that Unclassified generated a great deal of valuable discussion in areas which could be described as key to the future of reader development in libraries, for example in collection management. In terms of stock purchase, the project management team recommended that each library purchase at least 1,000 titles, some of which were bought in multiples of 10 or 15. Of these 1,000 titles, it was expected that 500 would be on display at any time. One problem experienced by group members was that certain colleagues wanted to display all new stock as soon as it arrived in the library building, but as a major element of

Unclassified is its bookshop-style display which clearly exploits the book cover design. This resulted in some cases in a loss of impact: as one member of the group said, 'it has certainly lost its minimalist approach!'

As a solution, the group devised a refresher training course to remind all staff members of the concept and more practical aspects associated with Unclassified.

A second positive outcome of Unclassified was the toolkit to which each member of the group contributed, which was distributed to guide those authorities purchasing the promotion. To summarise, the areas covered by this pack were:

- training
- evaluation
- outreach work
- collection management
- display
- maintenance.

For heads of service, introducing the Unclassified promotion into a library authority was an excellent way to create an impact. One authority had introduced the promotion on the same day as the research team spoke to the head of service, who exclaimed:

*People are crowding round it already!*

A second head of service suggested:

*We can't keep the dumpbin full! – we're very impressed.*

The project partner, Opening the Book, summarised the significant capacity of a promotion such as Unclassified to be maintained – and sustained:

*The concept of Unclassified has demonstrated the success of a dedicated area for face-on paperbacks in a prominent position; library authorities, both within and beyond Branching Out, have seen how this works and are now adapting it within their own services.*

## **5. Learning Reviews**

The method that has formed the backbone of the UCE evaluation of Branching Out is the Learning Review. The model for this was devised by Debbie Denham of the School of Information Studies at UCE, and used by her and Professor Judith Elkin from 1993 when delivering the Children's Literature module of the BA Honours degree in Information and Library Studies, a module also offered to BA (Hons) English students. Debbie and Judith felt that the students should develop a wide knowledge of children's literature through wide reading and personal reflection. They therefore changed the coursework requirements in order to include a more reflective approach, through a Reading Diary and an ongoing Learning Review in which

students were asked to underline any changes they noted in their approach to children's literature and reading (See Denham, 1994).

When the University of Central England became the academic partner to Branching Out, it was decided to adapt this successful form of self-evaluation and reflection for use with the librarians involved in the reader development initiative. The evaluation team felt that an experiential method would be the most appropriate, as the current library work of all Branching Out participants was integral to the continuing development of the training programme. In addition, as each participant is expected to develop a wide range of new skills in a relatively short period of time, it was considered that the learning experience of each individual would be enhanced if he or she could monitor his or her progress. Learning reviews were therefore first distributed at an early stage in the project, in order to provide participants with the opportunity to detect changes or developments in their feelings and in their knowledge acquired. The structure of the learning reviews was simple: a series of qualitative questions that focused on a specific theme and contained a limited - and therefore non-intimidating - space in which to note responses.

During the three years of Branching Out, five such reviews were devised, distributed and returned by all Branching Out participants to UCE:

- Learning Review One: the initial exercise
- Learning Review Two: agents of change
- Learning Review Three: project-based work
- Learning Review Four: monitoring the impact of Branching Out
- Learning Review Five: the overall impact of Branching Out.

### **5.1. The initial exercise**

The initial exercise was distributed to all participants in February 1999, four months after the project began, and focused on the following three subject areas:

1. Emotions
2. Learning
3. Reading.

In this review participants were asked to describe, for example:

- emotions and changes in emotions since the beginning of the project
- skills acquired to date and skills participants hoped to develop
- changes in reading habits since the beginning of their involvement in the project.

The responses submitted contained frank, often highly personal descriptions of participants' feelings at an early stage of the project:

*Positive and enthusiastic – but overwhelmed and concerned that other work is suffering.*

*Excited by project but daunted by workload.*

*I have an inability to see my own effectiveness/role within my own authority; there has been a lack of guidance to date on how to initiate promotional activities within your own authority.*

*My approach to Branching Out changes almost daily depending on outside influences i.e. colleagues/family etc.: finding [the] right balance is difficult.*

As part of their commitment to Branching Out, all participants were required to read two books per month and to complete book data sheets that formed the basis of the *Forager* book selection software. All who completed the first learning review reported changes in their reading habits as a direct result of this activity:

*[I am] reading and enjoying a far wider range than before, am spending more time reading background information on reading habits, and am making time to read on a more formalised basis.*

*I have less time to read for relaxation.*

*Instead of reading three books a month with readers' groups I am now reading five; I find myself wanting to take debut novels rather than 'suggested reads' e.g. prizewinners.*

*I am reading a lot more books, different types; am disciplining my reading times – but it can clash with 'family time'.*

A recurrent negative point was that many participants felt that their increased workload was difficult to manage, and that more demands were made on their time than before. With ten core training days to attend in ten different venues throughout England, finding time was a difficulty, in terms of the travelling involved, but also in terms of being removed from an increasing workload at the library. An increase in work pressures had led in some cases to feelings of 'stress', 'frustration' and even 'panic'.

Overall, the data from this first review revealed that the first period of Branching Out had been a success, and that the participants had met the initial months of the project with a great deal of enthusiasm. Despite an often increased workload, a number were already experiencing major attitudinal changes towards reader development, and were set in turn to bring about these changes in their colleagues and in their readers. Several members of the group even felt that they had an increased influence at work as a result of Branching Out, recognising, for example, the 'opportunity to influence book selection policy in my authority.'

## **5.2. Agents of change**

In the second year of the project the number of core training days was reduced by half, in order to give participants the opportunity to work in smaller project development groups. Although time commitment was still considerable, this new working style resulted in more flexibility in planning meetings and work timetables. The second learning review, completed in January 2000, therefore perhaps

unsurprisingly revealed participants to be generally far more satisfied with the project than they had been previously. It focused on an original aim of the project, which required participants to act as 'agents of change' within their authorities and within the wider library community.

The review asked for information concerning:

1. Personal changes
2. Changes in colleagues' attitudes
3. Changes in users' attitudes
4. Future changes.

The data revealed that all respondents felt that much was expected of them in their role as an agent of change, both by Branching Out and by their authority. They felt that they were expected to significantly raise the profile of reader development within their local authority, frequently acting with insufficient time or support from colleagues or senior management:

*I'm expected to be very proactive in spreading the 'gospel' of reader development to my colleagues.*

*I feel support for the project is lip service.*

They also felt that they were expected to promote stock selection changes, reader development projects and partnerships with external agencies:

*to energise my library service to improve its range of stock.*

*to champion' reader development projects.*

*[to] work in partnership with other authorities and agencies in reader-focused projects.*

However, many participants also appreciated the opportunity that Branching Out had offered them to increase their status within their local authority, and to influence senior management decision-making processes. This had clearly given them a sense of personal and professional achievement:

*I have made a major contribution to real change...and this gives me a sense of achievement.*

*It makes me feel involved at all levels of the department.*

Overall, respondents felt that their colleagues and senior managers were now more supportive of Branching Out than before, particularly as many tangible outcomes were now visible in the form of reader development projects:

*I think the concepts and ideals of Branching Out have become clearer and colleagues are able to see some of the initiatives are now coming through.*

*Support for any projects is usually forthcoming.*

Participants were generally unsure whether library users now had a more positive attitude towards reader development, although a number believed that changes in this area were beginning to take place:

*Having spoken to several readers' groups...it's very apparent that there is a great need and enthusiasm for activities around reader development.*

*We're attracting people in by showing the library has new activities they can contribute to.*

In the fourth section of the learning review, respondents were asked to consider the future of Branching Out within their authority. Each respondent was able to list at least three changes they wanted to see taking place over the remaining period of the project. The resulting data covered a wide range of subject areas, in particular:

- ◆ **Staffing:** devising and implementing staff training programmes; involving more staff in reader development issues; appointing a reader in residence.
- ◆ **Management:** increased collaboration and co-operation between staff across the authority; developing a working group to establish regional reader development; developing a regional reader development staff network.
- ◆ **Promotions:** increasing the number of fiction promotions/displays/events/activities; introducing the 'Unclassified' new fiction promotion project to as many libraries as possible.
- ◆ **Stock management:** integrating stock selection with promotion; purchasing non-mainstream material; introducing stock rotation; developing a more centralised stock selection process; specific budget allocation to reader development.
- ◆ **ICT:** increasing the use of ICT as a reader development tool; introducing Forager software in every branch within the authority.
- ◆ **General service concerns:** using reader development to attempt to halt the decline in issues; increasing service-wide acceptance of the legitimacy of promoting literature to socially excluded groups.

The overall message to emerge from these data was that, as a result of the changes they had been able to implement, many participants felt in a position to describe a number of significant personal and professional benefits derived from their involvement in Branching Out:

*I think I am fortunate in being in the group that will bring out the most obvious and permanent change to our users' methods of choosing fiction, which hopefully will have a knock-on effect in other areas.*

*...it is satisfying that I feel something tangible is being done.*

*'I really appreciate the contact and networking with the other Branching Out librarians...I think this will have a long-term effect.*

*The personal and professional benefits that I have gained through my work on Branching Out has come as a pleasant and great surprise. Professionally it has enhanced my standing within and outside the borough as an authority on contemporary literature.*

### **5.3. Project-based work**

The third learning review was completed in August 2000, and focused on the project-based work of the second year of Branching Out, during which participants worked in one or more of the following groups:

<b>Project</b>	<b>Partner</b>
1. Open Ticket	Book Communications
2. Forager	Applied Psychology Research
3. A Touch of...	National Library for the Blind
4. Book of the Month	Harper Collins
5. Loud and Proud	Books for Students
6. Unclassified	Opening the Book.

The aim of the third review was to enable Branching Out participants to reflect on their experience of this project work, in the following areas in particular:

1. Participation in project groups
2. Experience of group work
3. Skills development
4. Additional projects
5. Feedback and cascading.

Participants generally felt that working in the smaller project groups had been extremely enjoyable, and that it was a more beneficial working style than the core training days of Year One:

*I think it has been a much more effective use of time.*

*The project groups have been very enjoyable, enabling a more focused approach to a particular aspect of reader development.*

Many skills were developed as a result of project work, including:

- ◆ training skills
- ◆ team building
- ◆ understanding user needs
- ◆ ICT awareness
- ◆ increased knowledge of contemporary literature
- ◆ working with external agencies.

A particular strength of Branching Out was undoubtedly the enthusiasm of all participants, the fact that they kept up to date not only with the one project they were required to be involved in, but that they also demonstrated commitment to the initiative as a whole. This commitment was arguably strengthened by the intensive, group-based core training programme of Year One. When asked to list any disadvantages of smaller group work of the second year of the initiative, comments made included the following:

*Not being aware of other projects in any depth.*

*Need to guard against tendency to lose sight of the big picture...and indeed to keep up to date with other Branching Out work in general.*

Evidently, a major aim of a pilot initiative such as Branching Out was to cascade the message of reader development as widely as possible, and a number of participants were able to recognise the impact of their work on their local authority and beyond:

*At first constantly asking staff to get information was necessary, but now the scheme has extended beyond the original libraries, the comments are unsolicited and have been very positive.*

*Staff awareness is good, and growing as I cascade training throughout the authority.*

#### **5.4. Monitoring the impact of Branching Out**

It was decided that the fourth review, distributed shortly after a core training day entitled 'Reader development and Best Value', would include two questions based on the Best Value work the Branching Out authorities had been undertaking, namely:

*Are there any areas of Branching Out which you feel could support or have supported your authority's involvement in the Best Value inspection process?*

*At a personal level, do you now feel more confident about expressing your reader development work in Best Value terms?*

Although the majority of participants had felt either adequately confident or not at all confident in areas of Best Value work before the training day, it is significant that the response to the second of these questions showed that participation in Branching Out had helped to raise levels of confidence in this area. Examples of responses help to illustrate this point:

*The training on Best Value at the last Branching Out training day was excellent and helped to put reader development into the Best Value framework.*

*Following the training day in Liverpool I feel more confident about reader development and Best Value, in particular which messages to give to which group of people...*

*I now have a clearer understanding of Best Value and how it relates to reader development work.*

The reviews showed that participants recognised that this training day was a model to provide practical guidance and support, helping them to concentrate on the broader context of Branching Out within the specific Best Value remit.

The fourth review also considered the impact of regional networks developed and maintained throughout the three years. When each authority agreed to participate in Branching Out, it agreed to develop regional networks as part of the ongoing dissemination process. In terms of their perceived effectiveness in supporting librarians' work and the work of their authorities, not all participants had yet felt the impact of the networks when they completed the fourth review, although some felt that these networks had the potential to support their reader development work:

*The network is useful for keeping one up to date and maintaining networks/contacts. It has been neither supportive or unsupportive of Branching Out – it just exists alongside and is another strand to my reader development work.*

*I could not honestly say that the [network] has yet made an impact on the work of either the authority or myself but the potential is significant for it to do so.*

However, many extremely positive comments were made regarding networks and Branching Out, which both strengthened existing groups and developed new ones:

*In terms of effectiveness the network provides mutual support and a group of people to contact for ideas or information sharing.*

*The project has had a terrific effect on strengthening the partnership and giving it a sense of purpose.*

Plans to sustain the networks following the end of Branching Out in September 2001 were also clearly stated by almost all participants, whose comments included the following:

*I will have a supporting role in any projects that are developed but will not be directly involved, this will be taken over by other staff who are closer to serving the public than I am. I am happy with this and feel it is a natural progression.*

*...our desire to cooperate on various projects is likely to continue and I shall defend my right to attend meetings! We still have a lot to offer the region from what we have learned through Branching Out.*

*I will continue to attend meetings and help with regional projects. There is a good core of people on the group who want to push reader development so we will assess the success of the pure fiction promotion and plan accordingly.*

*...I will still attend the quarterly meetings and participate in any joint ventures (as appropriate).*

A key part of this review was the comments made concerning the personal changes that had taken place as a result of participants' involvement in Branching Out, and their subsequent increased confidence at work. Almost all respondents listed a wide range of both general comments concerning increased confidence, and specific comments about particular areas of work. The following are examples of each, beginning with specific comments, many of which focused on training and stock selection:

*I had done training before but this really helped my self confidence, showed me why I was doing it and I have used the planning sessions since.*

*Yes, watching Rachel train staff and being involved in setting up training sessions for the staff in Leeds has been hugely beneficial. I have since adopted a similar approach to training staff within my authority.*

*I think I always did select stock in the Branching Out categories, but now feel more confident in doing this. I am now selecting it to fit a perceived need rather than to provoke comments from our library users as I used to.*

*My approach to selection has altered radically and I now buy many titles I would not have considered – and promote them in different ways.*

More general comments included:

*There is no doubt that Branching Out has increased my confidence. I feel very much that I am an advocate for reader development in [my authority], and more importantly, am seen as an advocate.*

*I would hope that confidence and knowledge has been greatly expanded in most of the areas mentioned. It has been a fundamental change in attitude, which I feel I can convey to anyone, within or outside the Library Service.*

*The profile that Branching Out has given to reader development has helped. Reader development can no longer be treated like a poor relation to other library developments. This has helped build confidence and given countless opportunities for the advocacy and passion that we have to be used.*

## **5.5 The overall impact of Branching Out**

These thoughts were repeated in the fifth review, although in the section looking at the extent to which participants felt supported by colleagues and senior managers, some concerns were expressed:

*I have been supported but my workload has not been reduced to allow for the extra work that Branching Out incurs...at my senior management level it has been extremely difficult to find space to put the theory into practice! I cannot*

*do everything I want to implement good Branching Out practice! However the training is there and eventually all projects can be incorporated in our work.*

The main message to emerge from this review, however, was that a number of changes had taken place within participating authorities as a direct result of Branching Out, for example in terms of policy changes, training programmes developed and cultural changes. In addition, respondents felt that they had contributed a great deal to these changes:

*I have moved us towards [these changes] by redefining our stock selection and promotion into an overall strategy. I am fortunate to be in a senior enough position to affect these changes.*

*Working with colleagues who have also become enthused through Branching Out initiatives or promotions has enabled me to have a definite impact on the culture of the service.*

## **6. The views of the heads of service in Branching Out**

Although the UCE evaluation of Branching Out in Year One focused entirely on the Branching Out librarians themselves, from the second year an attempt was made to evaluate the wider impact of the project as it developed, investigating the views of partners in Year Two group projects, colleagues and senior managers. The activity that undoubtedly generated the most interest was the series of interviews conducted with Heads of Service in Branching Out authorities towards the end of the second and third years of the project, in order to determine their perception of the impact of the initiative on their staff and their authority.

The first interview asked respondents to consider, for example, the work of their Branching Out representative, the challenges of participation and anticipated outcomes of the remainder of the project.

After just two years of the project, Heads of Service were obviously unable to assess the impact of the entire initiative on their authority. The research team therefore conducted a second series of interviews towards the end of the third year. These focused on the impact of the project on staff within the authority, firstly on the Branching Out representative, then moving out to the entire library staff. They also considered issues of sustainability and cultural change.

### **6.1 Interview findings**

The data collected from the first of these interviews revealed that overall, the Heads of Service were impressed by the work being carried out within their authorities by their Branching Out representatives and were aware of many changes taking place in their authorities, for example:

- the creation of reading groups and the development of a reading groups policy
- Branching Out as a regular agenda item at library management group meetings

- a group of 'literature champions' created to support the Branching Out librarian
- the development of regional networks.

## 6.2 The challenge of dissemination

The learning reviews revealed that the Branching Out librarians felt that they must have concrete evidence of project outcomes as soon as possible: *'the lack of short-term pay-offs makes it difficult to justify to some staff.* However, it is perhaps reassuring that the interviews with their senior managers revealed that they were not expected to move mountains from Day One:

*...it's a big authority...I wouldn't expect all library assistants to know everything.*

*It's not large scale yet – small, we're nibbling at the edges.*

One head of service said that her Branching Out representative had told her how frustrated he felt that there were so few reading groups within the authority as a result of his work. She had reassured him, however:

*Don't lose heart – through these three [reading groups], people will see that they're working – then will want to spread it.*

This theme of beginning on a small scale is repeated in other ways in a number of authorities. Senior managers clearly did not expect wide-scale cascading to take place before all staff fully understood the concepts of reader development and Branching Out. One authority, for example, had introduced a reader development staff newsletter as a simple first stage of project dissemination. As the head of service stated:

*Even the term 'reader development' – people don't understand it. You've got to make the concept very simple. So the newsletter says it in simple terms.*

In a second authority, the head of service had been pleased to see his Branching Out representative piloting all reader development initiatives at a very local level:

*She trials it with her own staff first, so it works when she takes it out to other staff.*

This method had clearly paid off, and the head of service explained that as a result:

*Other colleagues have also wanted to become involved in cascading – so it has gone throughout the authority.*

In order to disseminate the details of such a large initiative as Branching Out as widely as possible, a considerable amount of work is necessary, and almost all heads of service pointed to the difficulty of allocating – or finding – sufficient time for this to be done:

*Cascading – we have not done as much as we would have liked, it's a time thing...any lack of work is down to a lack of time in the main.*

*...time is not easy to allocate...we didn't appreciate the amount of time required.*

They also appreciated that certain participants found it difficult to 'sell' reader development to their peers:

*[name] has found...trying to champion something quite a challenge – it requires being tough. It's difficult if you're not in a position of power and don't perceive positional power.*

*[name] has not been able to engage the staff as well as he might have hoped – the staff are often very resistant to being involved in things.*

In other authorities, however, the fact that the Branching Out representative was promoting the project to peers was regarded as an advantage:

*It's important to have someone who's a direct service provider. We thought about whether [the representative] should have been a divisional rather than a group manager, but they're not directly responsible for service delivery...it was therefore the right decision because of the mix of service responsibilities, but also in terms of her peer group.*

*...looking at her post, she's still based in a public service post, so nobody could accuse her of coming up with things from an ivory tower.*

### **6.3 The value of staff training**

In order for the work of Branching Out to reach as many staff within an authority as possible, heads of service recognised the need for staff training, which one described as 'getting people to have the confidence in their own abilities.' Although this increased confidence was an original objective of the Opening the Book team, it was not necessarily an anticipated outcome of the participating authorities. However, an interesting finding of the evaluation was that in authorities in which often overworked employees are perhaps reluctant to change, Branching Out was successfully used as a means of engaging staff:

*...a training day on selecting stock and fiction...got people thinking about new ways of selecting stock, moving to centralised selection. So Branching Out has helped.*

A further advantage of staff training was recognised by heads of service who appreciated the heavy workload given to just one person, the Branching Out representative:

*[I am] keen to split the responsibility, [to] develop a wider range of people who have the skills.*

*...you have to be passing on skills, or [they] are lost and sidelined.*

Commenting at the end of Branching Out on how widely they felt the initiative to have been cascaded throughout their authority, almost half the number of chiefs interviewed felt that it had been difficult to spread the work of the project to all members of staff. One said that the Branching Out librarian had had:

*...a problem to spread the word outside, to change the reaction of our branch staff...almost all of our staff are part-timers. To them the library service is the library they work in...They have not shown any resistance, have just been a bit wary.*

Another suggested:

*There has been no resistance from other staff, although there hasn't been an equal commitment.*

A third made a similar point that the response to cascading often depended not only on the Branching Out representative and his or her work to disseminate the work of the project, but also on the existing level of staff enthusiasm:

*...some people have taken to it, you just know they understand, but others don't seem to understand the concept.*

However, both those heads of service who felt that Branching Out had been cascaded to all levels of staff, and those who felt that it had perhaps not yet reached certain sections of their staff, provided very positive examples of ways in which this dissemination had been achieved:

*The project has been very successful: it has increased the confidence in reader development of staff throughout the organisation. It has made it more tangible and possible, even for those who might be nervous or apprehensive. It has been a way to engage all staff.*

*We all know it's what libraries should have been doing for years, but somehow it's slipped through the cracks. With Branching Out, the staff have had something they could engage with.*

#### **6.4 The sustainability of Branching Out**

The interviews also looked at issues of sustainability. When asked how Branching Out would be sustained within their authority after the end of September, it was encouraging that all except one chief interviewed gave detailed responses, outlining many ways in which the work of the project would be sustained and developed, for example:

*Reader development now appears in our service plan, we are pressing it with the elected members in order to increase the bookfunds.*

*Our authority has been restructuring, so we knew that the project was coming to an end, but wanted the work to continue, so we have built it into our plans, with equal status as other areas such as social inclusion and lifelong learning. Before Branching Out we might not have done that.*

*We have centralised selection for fiction – we haven't seen increased issue figures, but we haven't got the staff time to analyse it enough. We will try to do so, to track those issues, to link them with the promotions. We have realised that we need to produce a strategy for attempting to reverse the trend in declining issues: we need to know how we're going to do it, to connect the policy with the practice.*

## **6.5 Cultural change**

The evidence indicated that heads of service were impressed by the work being carried out within their authorities by their Branching Out representatives and, as a result of the first two years of the initiative, they were aware that many changes had undoubtedly taken place in Branching Out authorities. One referred to a 'huge cultural change', and another suggested that reader development had now been 'mainstreamed' in the authority.

However, the first interviews also confirmed that heads of service did not necessarily expect massive changes to take place each day. For a project to be sustained in the longer-term and developed on a larger scale, it first needs to be established 'at home', to be embedded into the culture of each authority.

When asked in 2000 what they would like to emerge from Branching Out in the third year of the initiative, the local need was clearly stated by heads of service. Terms repeatedly used included 'embedded', 'building blocks', 'laying the foundations', and 'consolidation'. As one senior manager suggested:

*We haven't always got to keep thinking of new ideas – don't you think it's time we started making the things we've got work better, rather than inventing all the time?*

A second authority was now 'trying to build Branching Out into the core of what we're doing, rather than just an add on', and aimed to 'use the third year to win the hearts and minds of all staff.'

A similar feeling was expressed by a third head of service:

*You can only do so much pushing and selling – you've got to pull people along with you.*

At the end of the initiative, however, the findings of the second series of interviews suggested that cultural change had taken place in almost all of the authorities participating in Branching Out, and many senior managers felt that reader development was now a core aspect of the library service:

*[Branching Out] has made us focus on themes which were underrepresented before, it has challenged our preconceptions in a long-term way. It was a cost-effective project in terms of using budgets we were already spending.*

*The cultural change is happening. What goes with it is a need for the librarians to change what they're doing...it's not just about understanding but working in a different way, about feeling comfortable with that.*

*Branching Out has provided a framework, has been a catalyst. In the authority we will tend to have one or two examples of really good practice, but to get that rolled out county-wide is quite difficult.*

## **6.6 Colleagues' support**

If the aims and objectives of a project are to be accepted by all members of an organisation, the project manager will require not only senior management support, but also support from his or her peers. Instilling a sense of commitment in all staff should be easier to achieve with the combined energies of a group of people representing several departments. The benefits of this joint ownership were illustrated in the Branching Out project in which, as Van Riel (2001b) states:

*Sharing and support are part of the training process of the project management team...it's not about hoarding.*

As a result of Branching Out, reader development significantly increased in status in many local authorities, and it was often the case that as the work of the Branching Out librarians increased and the outcomes perhaps became more tangible, the size of the reader development 'team' working within those authorities also increased:

*Very much supported by both [colleagues and senior management]: there are a lot of people in this authority, including the Head of Libraries, who are very pro reader development and there is a very proactive culture in this subject.*

*I feel that it [the support] has grown with the project, particularly as there have been tangible outcomes since Year Two.*

*Colleagues were sceptical at first...[they] have become keener to participate as they have seen the benefits of what we have done so far...*

*Concrete gains have generated the most support.*

Van Riel (2001b) viewed this evidence of support extremely positively, as it suggested that the project was being cascaded on a larger scale:

*Where others take responsibility, that's to be welcomed.*

It could be suggested that sharing work in this way is not only beneficial in terms of facilitating project dissemination, but it also prevents the development of territorial attitudes. A number of heads of service referred to cultural changes to which the project had significantly contributed, and suggested that reader development had

been 'mainstreamed', was now a core function of the work of the authority. Inevitably, a project that has been integrated to such an extent could not be the territory of one person, even of one team of favoured staff, but it develops and grows, becoming accepted by all staff as vital to the new organisational culture.

## **7. Consultancy sessions**

Each authority was entitled to the equivalent of one day's consultancy from the project Director in each year of the project. The aim of these sessions was to:

*...allow a more individual support relationship to develop than is possible in core training days. (Van Riel, 1999, p.8)*

Although the three days were offered as consultancy sessions, the authorities were given the option to use the time as they wanted. As a result, the Opening the Book team delivered a combination of consultancy and training, often in order to demonstrate ways in which theory could be transferred to practice.

In every case, senior managers were invited to participate, and the Branching Out librarian was therefore able to participate directly in senior management meetings and engage in senior management decision-making.

In addition, the third year session was negotiated and planned at a senior management level, rather than directly through the Branching Out representative. In this way, the project management team hoped to ensure greater senior level involvement.

A wide range of subjects was covered during the three sessions (as illustrated below), and in a number of cases Branching Out librarians from the same region joined together to maximise their use of the time available.

### **Year One**

- Selection policy and methods
- Unclassified – a new approach to promoting fiction in large libraries
- Promoting gay and lesbian literature
- Selecting and promoting poetry
- Designing and delivering a regional conference for readers' groups
- Audience development for events in libraries
- Reader development strategy
- Designing and delivering training in promotion
- Setting up a Reader in Residence post.

### **Year Two**

- Sessions with management teams
- Issues in selection
- Cascading reader development training
- Installing Unclassified
- Promoting to specific groups
- ICT and reader development

- Evaluation.

### **Year Three**

The main focus of the third year was on helping the authority to create:

- A reader development strategy document
- A three-year reader development action plan (from October 2001)<sup>3</sup>.

In order to achieve these outcomes, the Opening the Book team divided the day into two sessions:

#### *Morning*

*The library management team and the Branching Out librarian meet with Opening the Book to work on the authority's draft Policy and Action Plan*

#### *Afternoon*

*The Branching Out librarian and their line manager meet with Opening the Book to work on the detail of the Action Plan. (Opening the Book, 2001)*

Subjects covered during these sessions included the following:

1. The authority's reader development priorities
2. Responsibilities for reader development in the authority's management structure
3. Stock management
4. Staff training
5. Linking the proposed reader development strategy with other key priorities e.g. Best Value, Lifelong Learning etc.

In her final report to the Branching Out Board in September 2001, the Director of Branching Out reported:

*Authorities which were unsure of the benefits of the programme, or were struggling to meet the commitments in Year 1, articulated loud and clear how much they had got out of it by Year 3. (Van Riel, 2001a, p.3)*

In its observation of a session conducted during the third year, the research team noted that this was in fact illustrated in comments made by members of the senior management team:

*It [Branching Out] has given a focus and a status to reader development, broadening people's minds about who are our readers.*

*We now have a clearer understanding of what our business is, i.e. learning, information and culture.*

*It has benefited staff in terms of re-energising them, has validated their thinking and [they are now] getting involved in reading.*

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<sup>3</sup> 'The strategy and action plan were agreed to by each authority as part of their commitment in entering the programme in September 1988.' (Van Riel, 2000a, p.2).

Senior managers present at the consultancy session felt that at the end of Branching Out they now had an opportunity to plan for the future of reader development within their authority:

*It [our experience of Branching Out] has been thought-provoking in general...has provoked and challenged us on a number of issues, but it perhaps has not enabled that systematic change to happen...We now need to apply our thinking, to make it more tangible for staff.*

*We need to push the reading experience more widely, into the community, and build on the skills and confidence we're getting.*

*We now have confidence in dealing with the issues, and I don't feel that we've looked back.*

## **8. Conclusions: evaluative findings**

There are a number of conclusions to be drawn from the evaluative findings summarised in this document.

### **8.1 Achieving structural and cultural change**

The intended outcome of all projects is to effect some degree of change, but achieving this can be a slow process. In a large-scale initiative such as Branching Out, it would have been insufficient for one librarian to be committed to the aims and objectives of the new piece of work; he or she also required the support of colleagues at all levels of the organisation, in order to accomplish cultural change.

In a successfully managed project, cultural change will accompany structural change, as Anthony (1994) confirms:

*...the attempt to manage culture without structural change is likely to be at best ineffective and at worst dangerous...structure is not only a necessary accompaniment of cultural change but...it often provides the best means of achieving it. (p.3)*

#### **8.1.1 The involvement of heads of service**

Where heads of service in Branching Out authorities were unable to articulate this link between the project and a far wider cultural agenda, the Branching Out librarians – the project managers within their individual authorities – required additional support, either from colleagues or from outside their authority. This could be from other Branching Out librarians, regional networks, the project Director or even the project management board. In this way, potential damage caused by a lack of senior managers' or colleagues' support is limited. This is a transferable means of disseminating work and maximising its effectiveness, simply by involving more people and thereby attracting more support and increasing the impact of an initiative.

Although this additional support was undoubtedly available in many cases, the project Director argued that:

*Those authorities which have derived the most from the project are those where the Chiefs could see how their work is related to the bigger agenda.*

#### **8.1.2 The involvement of colleagues**

Although the field of reader development has dramatically increased in recognition in recent years, it would be wrong to suggest that it is a core aspect of service provision in all public libraries. The implementation and maintenance of reader development practice developed during Branching Out will inevitably be affected by contact with those who have not yet appreciated the relevance of reader development projects to their library service. However, this will be reduced if widespread dissemination and explanation of the aims and objectives of the project have taken place. As the Branching Out Director summarised:

*Within authorities, the level of support provided makes a profound difference: this is not 'hands on', we don't ask them to treat Branching Out as any*

*different from any other projects...but if the Chiefs understand what it is and can see how it links to their priorities, it makes a huge difference.*

### **8.1.3 Summary**

The Branching Out reader development programme led to significant structural and cultural changes, both within the participating authorities and beyond, via a series of highly effective regional networks.

As with any long-term initiative, the changes did not occur immediately, and the project inevitably developed at a different pace within each authority. However, those parties consulted after three years of participation reported a wide range of tangible, sustainable outcomes. It is significant that it was not just the practitioners but also the senior managers who gave examples of such outcomes. The following is a non-exhaustive list of examples, as frequently cited both by the Branching Out librarians and by their heads of service and senior management teams:

- Increased staff knowledge of contemporary literature
- Increased staff awareness of readers and their reading needs
- Acquisition of (transferable) skills with which to design training programmes
- Acquisition of tools with which to attract larger reading audiences to libraries
- Demonstration of sustainable models of partnerships e.g. between libraries and commercial partners
- Increased collaboration and cooperation between staff across an authority
- Sustained development or creation of regional networks for reader development work
- New focus on stock selection and book promotion as integrated processes
- Development and provision of centralised stock selection processes
- Increased use of ICT as a reader development tool
- Development/revision of reader development policies, e.g. service plans, policy documents.

All parties consulted for the evaluation recognised that Branching Out had indeed made a significant contribution to cultural change, that it had demonstrated the value of reader development as a core activity in the public library sector. As one head of service agreed:

*The cultural change is happening. What goes with it is a need for the librarians to change what they're doing...It's not just about understanding but [about] working in a different way, about feeling comfortable with that.*

## **8.2 The future of Branching Out**

As a result of the Branching Out initiative, 33 public library authorities plus the National Library for the Blind have benefited – and have developed mechanisms by which to continue to benefit - from a resource-intensive but cost-effective programme of face-to-face, group-based training and consultancy, involving a core group of trainers and trainees.

The Society of Chief Librarians (SCL) has jointly planned with Opening the Book how the benefits of Branching Out can be extended to all 149 authorities in England but

these plans, which include online training delivery to frontline staff, are subject to funding. Applications have also been made for lottery funding for national programmes in Wales and Scotland.

It seems appropriate to conclude with the words of a Branching Out librarian, whose final comment concerning the impact of participation was as follows:

*Branching Out has raised my profile considerably in the authority, and although it hasn't improved my career in the short term, it could eventually. It has made me much more confident in presenting information and training, and in stock awareness in particular.*

*It's probably a bit of an overstatement to say I am a 'changed person' but I feel it has changed my perception of what we are here for, and [has] made me much more confident about pushing the ideals of reader development.*

*All in all, an incredibly worthwhile (and exhausting!) experience.*

## **9. Conclusions: evaluative methodologies**

The following conclusions concern the perceived impact and effectiveness of the UCE evaluation methodologies devised for the Branching Out initiative.

### **9.1 The value of qualitative evaluation methodologies**

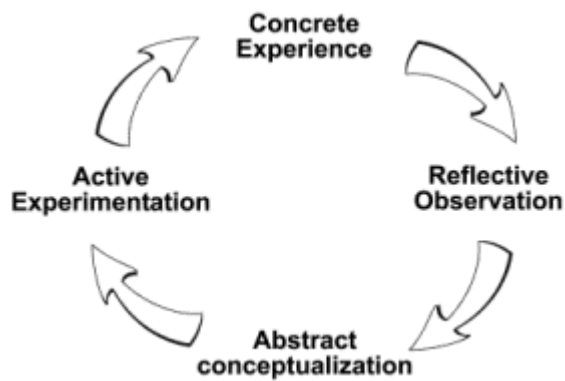
The service information to be derived from performance measurement in the public library sector was until recently extremely limited: if a local authority was asked to record whether it had achieved a certain standard, the library manager could simply tick or cross a box on a form as appropriate. Thanks to recent changes in funding availability for public library projects from both regional and national arts and government, local authorities have been able to participate in longer-term initiatives such as Branching Out. In addition, the involvement of an academic partner in the project can demonstrate the value of implementing an ongoing process of qualitative evaluation to illustrate the sustainable impact of an initiative.

In the first instance, this value could be evident in securing further funding, but library managers should also be able to recognise the merit of evaluating a longer-term programme which is developmental, incremental, focusing on continuous improvement and innovation. Hopefully, participation in projects such as these has also underlined the dangers of prescriptive measures of quality, which arguably stifle innovation and encourage participants to strive to reach a standard, rather than to exceed it.

#### **9.1.1 Branching Out and experiential learning: theory and practice**

As illustrated in section 5, experiential learning theories advocating individual reflection can be used to support professional learning practice. In addition, professionals can derive personal benefits from experiential group learning, and can adapt experiential theory in order to devise training tools through which to share knowledge acquired.

The strength of the Branching Out reader development initiative as a model of professional learning therefore lies in two areas. Firstly, the project remit is such that it supports the application of a theoretical framework to professional practice, thereby providing guidance to both the trainer and the trainee. Secondly, the Branching Out learning methodology combines elements which encourage both group interaction and individual reflection: as in Kolb's learning cycle (Figure 2), group members acquire knowledge through experimentation and experience, which is subsequently embedded through individual reflection. Following this process of reflection, the cycle recurs, as participants are encouraged to modify their experience as a result of their observation of or reflection on such an experience.



**Figure 2. Kolb's learning cycle, taken from McLoughlin (1999)**

The effective combination of the Opening the Book training and UCE evaluation methodologies have clearly demonstrated the value of research to practice, and vice versa.

### **9.1.2 An altered evaluative focus**

Although the evaluation of the impact of an initiative on people is more difficult to undertake than the impact on systems, this altered focus is nonetheless more appropriate to the emerging qualitative, person-centred evaluation that projects such as Branching Out have brought to light and developed.

For example, although comments made regarding the impact of Branching Out by Heads of Service and the Opening the Book team endorsed the views of the Branching Out librarians, the additional use of the experiential learning review with the participants themselves gave the fullest possible understanding of the effectiveness of the project. This would arguably not have been achieved using alternative evaluative methods.

The data collected using methodologies such as those developed by the UCE team attempt to evaluate the intangible elements of a library service. To a large extent, these elements are those that the current Government frequently cites as its key concerns, such as Lifelong Learning, social inclusion and access to ICT resources.

It therefore follows that if measures are adopted which evaluate the impact of a library service on these areas, the data collected will surely enhance the overall monitoring process of that service.

### **9.1.3 Using evaluation to support service review or inspection**

The process to which all local authorities must currently subscribe is Best Value, for which the Government requires the development of annual Best Value Performance Plans and five-yearly service reviews. The processes via which such documents are produced encourage local authorities to consider whether the services they provide are appropriate and even, where necessary, to significantly alter their core philosophy. Best Value clearly places the focus of these quality reviews on the local community, rather than on the systems via which the service is provided to that community.

The findings of the evaluation conducted by the research team or, more locally, by individual library authorities, could be used as evidence of a high-quality service, a model of good value to feed into any inspection process.

As the nature of public sector funding changes, and each local authority is required to submit far more evidence-based documentation as to the quality of the service it provides, it seems only reasonable to suggest that subscription to the 'new', quality-based performance measurements will subsequently enhance the standing of that local authority within the community it supports. As the Comedia report 'Borrowed Time' stated:

*The role of the library in community development and enrichment is a vital issue, but one which is not easily amenable to current concerns with 'performance indicators.' Such techniques can easily measure book issues, turnover of book stock and other statistics, but in no way can measure the quality of the relationship between a library, its users and the geographical area it serves. (Comedia, 1993, p.35)*

#### **9.1.4 Summary of benefits of qualitative evaluation methodologies**

To summarise, the strength of the UCE evaluation of Branching Out lies in the fact that it has addressed the less obviously quantifiable aspects of the work of a local authority, such as confidence development, attitudinal changes and skills development in its staff, who in turn provide a higher quality service to the end user. In this model, evaluative methods are not merely used once, but are revisited and adapted according to developments in a constantly changing initiative. 'Traditional' quality measures tend to be static, measuring a single point in time, but a methodology as outlined above has arguably enabled librarians to move away from the limitations of previous measures, with the evaluative focus transferred from systems to people.

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## Appendix 1. Skills Audit – Initial Assessment

Self-Assessment of skills/experience levels by Branching Out participants<sup>1</sup>, February 1999

Level of Competence <sup>2</sup>	LOW			MODERATE			HIGH			Total		
	0	1	2	3	4	5	6	7	8		9	10
Book-based skills												
Fiction book selection				2	1	4	1	9	13	2		32
Breadth of fiction reading across genres	1	1	1	4	2	10	4	5	3	1		32
Knowledge of variety of genres/authors			2	6	1	1	8	8	4	2		32
Promotional skills												
Writing press releases	4	1	8	1	3	4	5	4	1	1		32
Other press relations	3	7	6	6	3	2	2	2		1		32
Devising/producing promotional materials	1		5	3	3	6	4	4	5	1		32
Writing skills		1	1	1	3	1	12	8	4	1		32
Oral presentation skills	1		5	2	3	4	2	9	5	1		32
IT skills												
Word processing		3	3		2	5	6	7	3	3		32
Internet searching	4	4	5	4	1	6	3	4		1		32
Desk top publishing	13	4	6	2	1	3		2		1		32
Website design	26	4	1						1			32
General management skills												
Training library staff		2	2	1	2		6	10	5	4		32
Mentoring other library staff	5	2	2	1	3	3		9	5	2		32
Time management	2			2	1	5	6	8	5	3		32
Prioritising your workload				4	2	6	2	8	7	3		32
Networking			3		2	7	6	4	7	2	1	32
Writing policy documents	6	2	2	2	4	2	5	4	3	2		32
Research/evaluation												
Evaluation of individual projects	2	4	6	3	3	4	2	3	4	1		32
Defining project aims and objectives	2	1	6	3	3	4	2	4	6	1		32
Devising research instruments	6	8	5	1	2	2	4	1	3			32
User surveys	12	3	1	4	2	1	4	3	1	1		32
Analysis of research data	9	6	3	3	2	1	4	3	1			32
Writing up research project reports	9	5	3	4	1	4	1	2	2	1		32

<sup>1</sup> 32 out of a total of 34 participants completed the Skills Audit

<sup>2</sup> Competence assessed on a sliding scale of 0-10, where 0 represents no experience/skill and 10 considerable experience/skill

## Appendix 2. Skills Audit – Second Assessment

Self-Assessment of skills/experience levels by Branching Out participants<sup>3</sup>, July 2001

Level of Competence	LOW			MODERATE			HIGH				Total	
	0	1	2	3	4	5	6	7	8	9		10
Book-based skills												
Fiction book selection							2	4	12	2	4	24
Breadth of fiction reading across genres						4	2	12	4	2		24
Knowledge of variety of genres/authors						2		4	16	2		24
Promotional skills												
Writing press releases	2			2			10	6	2		2	24
Other press relations	2	2				2	10	4	4			24
Devising/producing promotional materials					4			12	6	2		24
Writing skills							2	10	6	2	2	24
Oral presentation skills				4				6	6	6	2	24
IT skills												
Word processing						2	4	6	8	2	2	24
Internet searching					2		6	2	6	6	2	24
Desk top publishing	8	2	2				4	2	4	2		24
Website design	6		2	2	4	4	4		2			24
General management skills												
Training library staff								8	14	2		24
Mentoring other library staff				2			2	4	12		4	24
Time management							4	2	16		2	24
Prioritising your workload							2	6	10	4	2	24
Networking							2	4	14	4		24
Writing policy documents	2				2			6	10	2	2	24
Research/evaluation												
Evaluation of individual projects				2		6		8	2	2	4	24
Defining project aims and objectives					2	2		8	6	2	4	24
Devising research instruments		2				4	4	10		2	2	24
User surveys			2	2	2	4		10		2	2	24
Analysis of research data	4			2	2	8		2	2	2	2	24
Writing up research project reports	2		2		2	2	6	6		2	2	24

<sup>3</sup> 24 out of a total of 34 participants completed the Skills Audit

### **Appendix 3.**

#### **Branching Out publications, conference papers and reports**

##### **Published articles:**

1. Train, B and Elkin, J (forthcoming) Proposed article based on the qualitative methodologies used in the evaluation of Branching Out. *Journal of Documentation*, details to be confirmed.
2. Train, B (2001) Article summarising the findings of the Branching Out evaluation. *Library Association Record*, December.
3. Train, B (2000) *Reader development takes root*. *Library Association Record*, 102 (11), 636-7.
4. Train, B (2000) *Root and branch examination*. *Public Library Journal*, 15(4), 118-9.
5. Train, B and Elkin, J (2001) *Branching Out: a model for experiential learning in professional practice*. *The Journal of Librarianship and Information Science*, 33(2), 69-75.
6. Train, B and Elkin, J (2001) *Measuring the unmeasurable: reader development and its impact on performance measurement in the public library sector*. *Library Review*, 50 (6).
7. Train, B and Elkin, J (2001) *Effecting change: reader development projects in public libraries*. *Library Management*, September.

##### **Conference papers and project reports:**

1. Train, B (2000) 'Learning Reviews: initial exercise'. Branching Out project report.
2. Train, B (2000) 'Learning Reviews: second exercise – agents of change'. Branching Out project report.
3. Train, B (2000) 'Skills audit: initial assessment – summary'. Branching Out project report.
4. Train, B (2000) 'Branching Out year 2: an evaluation report'. Presentation to Branching Out librarians and Board members, Bath, September 2000.  
<http://www.branching-out.net/background/evaluation/Year%202%20eval.htm>
5. Train, B (2000) 'Analysis of the self-evaluation questionnaire survey concerning year one of Branching Out: responses from project participants'. Branching Out project report.
6. Train, B (2001) 'The impact of Branching Out: evidence to support Branching Out 2 application'. Report to Branching Out Board, February 2001.
7. Train, B (2001) 'Proposal of evaluation methodology'. Report to Branching Out Board, February 2001.