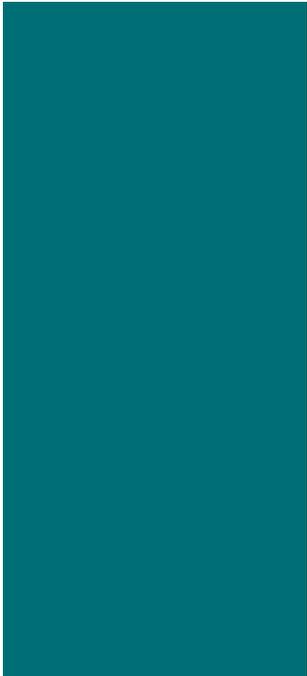
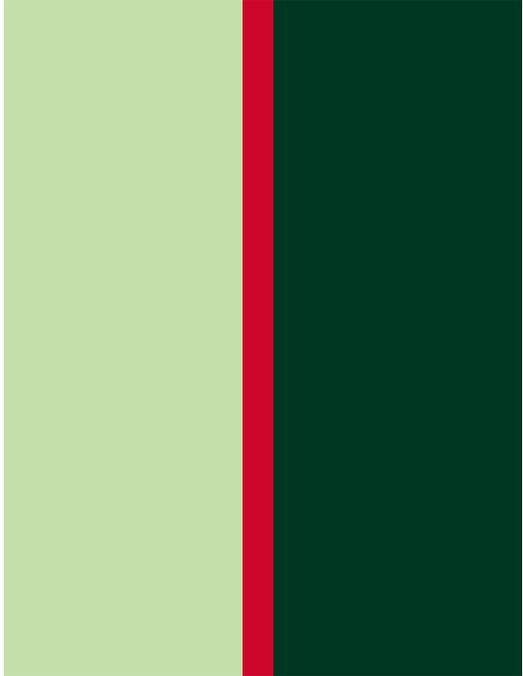




International Federation of
Library Associations and Institutions



Building Strong Library Associations Programme Manual



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License

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Programme Manual Overview

The purpose of this manual is to provide a comprehensive overview of the BSLA programme, and its management from the perspective of IFLA, associations using the programme, and partner organizations. It provides guidance on planning projects and activities and evaluation.

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1 Introduction to BSLA

Building Strong Library Associations is a comprehensive programme offering a strategic and coordinated approach to capacity building and sustainability of library associations. The programme benefits associations, libraries, and their communities.

The Building Strong Library Associations programme consists of:

- A modular, customizable training package on library association development
- IFLA's policy-based learning materials (for example, those developed by FAIFE)
- Mentoring and advice on forming partnerships
- Cross-association activities, to bring participants together
- An online platform to provide remote access to materials

The programme is delivered by IFLA's Action for Development through Libraries (ALP) programme.

Vision

IFLA's vision for this programme is to enrich society and the library and information profession by building strong, sustainable library associations. The programme will help library associations and their members increase their potential to:

- Improve services for library users
- Provide equitable access to information
- Develop the library and information profession

It will do this through a series of learning materials and activities that can be customised to accommodate different cultural, political, technological, social and other conditions.

The programme will focus on a sustainable and evidence-based approach to library association development, using impact assessment and other methods as appropriate to evaluate the outcomes of training and activities.

Audience

The programme is aimed at library association workers – this can be staff, office bearers, volunteers, representatives (such as regional co-ordinators) and members. BSLA works primarily with national associations, although other association types may participate depending on country context and needs. Depending on the nature of a country's library association, workshops designed to initially be delivered to a core group of individuals, with further workshops and cascade training, where appropriate, taking place during the project.

Parts of the programme can also be adapted for delivery to people outside of the library sector. Examples might include politicians and decision makers, or organisations working with library associations.

Programme sustainability

IFLA aims to provide a sustainable programme that will have positive benefits for all associations. IFLA will provide research and case studies for the benefit of all library associations, and opportunities for associations to share their successes.

See also: Annex 1

An introduction to BSLA – Powerpoint presentation

1.1 Role of the IFLA Action for Development through Libraries Programme (IFLA ALP)

IFLA ALP has been a strategic of IFLA since 1984, and has supported more than 200 projects, and oversees the governance and management of the Building Strong Library Associations programme and IFLA's other capacity building programmes on behalf of the Governing Board.

Building Better Library Communities

The IFLA Action for Development through Libraries Programme (IFLA ALP) works in collaboration with libraries, library associations, partner organisations and library professionals in developing and emerging countries to deliver relevant, sustainable activities for equitable access to information and better library communities.

IFLA ALP delivers community-led change through its training programmes, online learning activities and other opportunities, and access to IFLA's international network. IFLA ALP is based on a platform of policies and standards developed and endorsed by IFLA at the international level, and local priorities at the grassroots level.

IFLA ALP works at three levels to provide:

- Opportunity: to participate in the broader sector, to be represented

- Empowerment: through capacity building for the development and sustainability of library communities, including associations, institutions and individuals
- Expertise: Through IFLA's professional programme (guidelines, standards), networking, events, advocacy for libraries in society and the knowledge society

ALP aims to strengthen the ability of the library and information sector to advocate for equitable access to information and resilient, sustainable library communities. We will achieve this through the following strands of IFLA ALP:

- Building the capacity of national and regional library associations (Building Strong Library Associations Programme)
- Developing leaders who can effectively represent the wider library sector in the international arena, and within IFLA (IFLA International Leaders Programme)
- Advocacy for the role of access to information and libraries in the UN 2030 Agenda for Sustainable Development

We evaluate the impact of our work and turn outcomes into policy, guidelines and standards for further development of the LIS sector (Advancing the Professional Agenda).

Activities

The ALP Programme was launched in 1984 at the IFLA Conference in Nairobi, Kenya.

ALP achieves its objectives of turning policy and research into practice through:

- Capacity building programmes
- Regional and grassroots projects
- Supporting advocacy campaigns
- Toolkits and other resources
- Promoting awareness and adoption of IFLA policies, guidelines and other resources
- Identifying issues for further policy research from impact evaluations and programme reports

Roles and responsibilities

IFLA ALP advises IFLA members and partners on all aspects of capacity building programmes including:

- IFLA's instructional design and curricula approach

- Project design (eg learning components) where relevant
- Project communication to the IFLA membership
- Monitoring and Evaluation, using the Impact Evaluation framework
- Finding accredited IFLA trainers for projects, or supporting training and accreditation of new trainers
- Reporting and dissemination of results, including financial reports, impact reports, success stories

Regional Offices are key contact for all projects and assist with:

- Identifying local partners and participants in projects
- Identifying sources of local funding for projects
- Project communication, including dissemination of invitations locally
- Assisting with monitoring of projects and completion of financial reports in accordance with approved budgets

2 Understand IFLA's capacity building strategies and programmes

Capacity building approach

Capacity building activities include training and mentoring and stakeholder/partner meetings which helps associations to form partnerships, strengthen governance and member services, and to become better advocates for their library community. Training and activities are customized to the objectives of library associations, and for different cultural, political, technological and social conditions.

Programmes include a range of activities and elements including:

- Training package and case studies on library association development
- Mentoring and advice on forming partnerships
- Cross-association activities
- Cascade workshops and information-sharing
- An online platform for interactive learning and materials
- Impact evaluation, needs assessment, and meetings to review progress

As a capacity building programme, BSLA is about more than training – the relationships formed between IFLA, trainers and the association and the work implemented by associations between activities are of critical importance to the success of the programme and activities in each country. Membership in IFLA provides an ongoing link to the organisation and regions.

IFLA makes BSLA available to all of its members, and the training materials are freely available to anyone through the online platform¹. A number of associations are now using the materials independently, and in some instances forming bilateral agreements or seeking funding to carry out workshops.

See also: Annex 2

Blended learning specification – PDF

¹ <http://learning.ifla.org>

2.1 BSLA programme models

The programme has been delivered by IFLA and partners in a number of flexible ways:

- National projects
 - Country projects, small projects
- Regional activities
 - Events at regional conferences, regional projects, awareness raising activities
- Partnerships
 - With other associations or institutions
 - Work together to seek funding, mentoring
- Online access
 - IFLA members use Online Learning Platform for their own learning

Main project approaches

A well-established application and assessment process is used for country projects and for small projects.

Country projects: designed to run for 18 months up to 2 years. The projects began with the application process, and ended with the final impact evaluation reports. The first six countries formed a cohort and started and ended at the same time. Each country was paired with a core trainer for the whole project. An in-country facilitator was named. The projects were managed overall at IFLA Headquarters. The country project structure was effective, it provided a stable point of contact both for IFLA and the association, and allowed trainers and IFLA to build relationships with the country, visiting between 3-4 times (IFLA visited at the start and end of each project). Close attention was paid to ensuring that the programme and structure in each country was locally relevant and contextualized throughout the needs assessment process, design of programme activities, and monitoring of goals.

Small projects: These included a variety of models from one-off activities (complemented by work done by the association to communicate with their membership, or undertake change locally), or a series of activities with the same or different trainers focusing on a specific topic. Projects from 2013 onwards included a broad range of topics from strategic planning, to advocacy, and membership development and communications. Small projects utilised the same application procedure, with on the whole less involvement from IFLA Headquarters in the project itself apart from project administration and discussions about scope and objectives.

Regional projects: Projects involving more than one country, at times including cascade or train the trainer approaches.

Partnerships: Projects between associations, without funding or additional support from IFLA. BSLA trainers usually participate.

2.2 BSLA programme reports

A dedicated part of IFLA's website includes programme and project reports since the programme began in 2010: <http://www.ifla.org/bsla> and <http://www.ifla.org/bsla/country-reports>

See also: Annex 3

BSLA Impact Report 2012

IFLA Website: IFLA country and project reports: <http://www.ifla.org/bsla/country-reports>

3 Activities

Within the programme, or within any project, there are a range of activities that can be delivered:

- Needs assessment: Meetings and interviews with the association leadership, members, and key stakeholders/partners to understand the association's needs, goals and country context. Forms part of the impact evaluation process.
- Workshops: Using one or more of the BSLA training modules. Workshops can include:
 - Preparation of planning or strategy documents for the association
 - Work to form or strengthen partnerships, through inclusion of representatives at workshops or meetings alongside workshops
 - Roleplays/scenarios: Interactive activities
 - Case studies: A set of 20 cases linked to the BSLA training modules that explore how other associations approached the issues in their own situation
- Stakeholder/partner summit: Meeting of an association's key stakeholders and partners, often an opportunity to build consensus and support for an association's role in representing the library sector or advancing an advocacy issue
- Review meeting: Meetings and interviews to evaluate progress towards meeting goals with the association leadership, preparation of presentations for stakeholders, meetings with policymakers or others taking advantage of IFLA's presence in-country. Forms part of the impact evaluation process
- Train-the-trainer: Cascade approaches can be used to support new BSLA trainers, or to ensure BSLA training reaches across a country

3.1 Train the trainer, or cascade training

Train the trainer or cascade training enables learning to be extended throughout the library community in a country. After the initial participants have been trained, and depending on the country's needs, selected components of the BSLA training package can be cascaded throughout a country either through further workshops or by using the online platform.

For IFLA-funded country projects, the responsibility of IFLA's core trainers in collaboration with the in-country facilitator and others will be to ensure that those who will carry out the cascade training have the required support and skills. This may

including a half-day or session on training methods and impact evaluation as part of the initial workshop. Any expectations on participants to carry out further workshops or activities will need to be known in advance of their selection to participate in workshops.

It is expected that there will be a wide range of outcomes from cascade training in each country – one of the most successful aspects of IFLA programmes has been the unexpected outcomes of cascade training.

3.2 Who should participate in BSLA activities

Participants should be working in either a paid or voluntary capacity for their library association. It is recommended that participants include the association's leadership (President, Vice-President, other office bearers) and staff (if applicable).

Additional participants may include emerging leaders in the association. A broader audience may be reached through cascade training in-country.

Other participants may be librarians wishing to better support their library association through an improved understanding of how to build their association's capacity to perform well.

Parts of the programme are adaptable for delivery outside the library sector, to partners, politicians and decision makers. However, as such delivery would be made by the library associations themselves content would need to be highly customised. Guidance on these situations will be given by IFLA on an individual basis.

4 BSLA training package

Each module in the training package contains:

- Comprehensive trainers manual, slides and templates
- Learning objectives
- Structured discussions and group activities
- Case studies from library associations around the world

The trainers manual contains all the information needed to run a workshop or seminar.

Supporting information includes:

- Guide on running workshops
- Train-the-trainer materials
- Evaluating the impact of activities
- Reporting templates

The modules can be used individually and in any order. Most of the modules have been translated into IFLA's official languages and other languages as required locally for various projects.

Because of IFLA's International nature, our members – and those who would likely want to use our package – come from cultures with different learning styles and expectations, different training needs for their members, different requirements for building capabilities of their members and for strengthening their association, and different needs for sustainability. To accommodate this, the package is as open as possible, rather than prescriptive. The package therefore provides the outline and content of the modules, and blended learning components that include exercises, examples, goals and objectives relevant to the module content. Customisation due to differing needs is expected.

Summary of modules and their contents:

Module 1: Library Associations in Society: An overview

The aim of this module is to provide the context for the role that library associations can play in society and what makes a successful library association. It also provides an introduction to IFLA and its partners. This module provides references to internationally approved documents, statements and manifestos, drawn mainly from the United Nations, UNESCO and IFLA.

Module 2: Building Your Library Association

The aim of this module is to describe the basic components of a typical library association and discuss what needs to be put in place in order to establish and

operate a successful association. This module uses practical references drawn from IFLA Management of Library Associations Section (MLAS) and other sources.

Module 3: Sustaining your Library Association

This module is aimed at developing strategies for the long-term operation and sustainability of your library association. It offers ideas about the different functions and activities that can be undertaken by your association to ensure its long-term viability. Many of these functions and activities are covered from a different perspective in other modules in relation to their particular theme - for example, planning as a tool to establish a library association in Module 2 or coalition building as part of advocacy in Module 5. This module explores the way in which these factors contribute to the sustainability of your association, noting that the development of functions and strategies should always take into consideration the environment and the circumstances of your association. Examples used come from the experiences of a diverse range of library associations.

Module 4: Developing Strategic Relationships: Partnerships and Fundraising

The aim of this module is to explore the need for library associations to build relationships with the wider community for both fundraising and developing and maintaining strategic partnerships. The module examines the use of marketing strategies to build an association's visibility and profile which in turn lead to improved capability for fundraising and partnership building. The module draws on several tools for fundraising and relationship building and uses examples from a variety of library associations. Fundraising protocols and contexts for partnership building will vary from country to country and some customisation may be necessary for in-country delivery.

Module 5: Libraries on the Agenda

This module focuses on the role of the library association and libraries in the broader society with particular reference to functions in advocating, educating and campaigning for the increased importance of libraries in the information society. It draws on several tools for advocacy that have been developed by different library associations, although the module needs to tailor these toolkits to the circumstances of the association concerned. There are a variety of political contexts within which advocacy operates, and these need to be adapted on a country-by-country basis.

Additional modules:

Train the Trainer

The principal aims of this module are:

- To introduce participants to the IFLA Building Strong Library Associations Programme
- To help participants develop the knowledge and skills to become a confident trainer for the IFLA Building Strong Library Associations activities
- The presenter will need to adapt the material and customise it for the given audience. If delivered in its entirety, this training package is designed for a three-day workshop. Suitable local examples will be needed to illustrate key points and to maintain audience interest.

Library Statistics for Advocacy

This module was designed by a working group of IFLA's Statistics and Evaluation Section. Whenever we communicate with politicians, funding bodies or library stakeholders: if we want to put our libraries on the agenda, we need numbers, statistics and evidence to prove our point and underline our arguments. Advocacy and lobbying are not possible without relevant data to assist us. This is the reason why statistics are a vital issue for library associations and libraries who want to influence political processes in their country or on an international level.

4.1 Customising training modules

Each module can be customised for different social, language and political situations, and to meet the needs of different library associations.

There is no single pathway for using the materials. Library associations can use as much or as little of the training package as they need – for example, they do not need to participate in all modules.

IFLA takes a non-formal approach to learning and its training materials, due to the multilingual, multicultural and diversity of library associations and library association needs.

Customisation process

Customisation occurs at two levels:

- Selection of training modules based on needs assessment
- Selection of examples, case studies, activities prior to workshops

Trainers are strongly encouraged bring their own experiences and expertise to workshops. This may be through providing examples, adjusting learning activities to support local conditions and participants, or making use of the case studies database and other resources.

Each project will be different – each library association will have different goals, project teams, association structures, and political, cultural, social, and economic background. It is to be expected that training will need to be customized each time it is delivered. It is also expected that each deliver will help to develop the modules by generating new exercises, examples, and cases studies.

Tips for customising materials

1. Select from the materials what you need and you think will work for your purposes.
2. Identify local problems or groups with special needs that should be emphasised in your workshop.

3. Adapt the contents to your local culture. What can be said or discussed in one part of the world possibly can't in another. We rely on you to spot what needs to be changed or adapted for your culture.
4. Localise the examples and case studies. Your participants will understand and appreciate the material better if it is illustrated with examples from their own country or region.
5. Collect local materials (posters, handouts, booklets, etc) to show to the participants. These will help make what you tell them more real.
6. Involve local leaders and elected representatives as advisers (and maybe invite them to speak).
7. Make use of local experts and activists. If you can call on people from NGOs, community groups, government agencies and local government to support the workshop or to be a guest speaker, they can help you make the content more meaningful.
8. Expand the content of the materials to deal with hot local issues or special topics that your participants will want to know about.
9. Choose appropriate delivery methods. If you think that your participants will need a lot of time for discussion, allow for that. If they will enjoy participatory exercises try to design something suitable for them. Don't just rely on talking at them.
10. Try to make your workshop enjoyable and memorable. People learn best if they are having fun.

4.2 Case studies

A typical case study presents an example of a specific aspect of library association practice. The case studies build on the BSLA learning materials. It is a detailed account, or story, of what happened in a particular library association at a given point in time. Case studies can be used as part of a workshop, or separately, to analyse a situation. You will have the opportunity to think critically about the information presented through a series of discussion questions, to better understand the situation and develop a solution.

Using the case studies

Each BSLA module indicates where a case study may be relevant to the topic. Each case study is then cross-referenced to a topic in the training modules. You can use the case studies: As part of a workshop to illustrate a real problem or solution With your association's board to discuss how your association might approach the same situation Independently, to build your own knowledge of how other associations find solutions

Contents of each case study

- Abstract
- Key ideas – issues to be considered when reading the case study

- Relevant topics from the learning materials
- Profile of the library association
- Scope – the background and context
- Description of the main issues
- Questions to encourage readers to think critically about the issues
- Information sources
- Case notes (tags)

See also: Annex 4

List of Case studies by module

5 Programme and module usage license

A usage agreement or Memorandum of Agreement is generally made between IFLA and the relevant institutions regarding usage of IFLA's training materials, the use of IFLA's name, and support available from IFLA Officers and Headquarters staff.

The purpose of a usage agreement is to:

- Ensure that IFLA has a role in planning use of its materials
- Monitor usage of IFLA's name and identity
- Assist with identifying sources of local funding and, where appropriate, consulting on proposals
- Work with projects on evaluation, reporting and communication on activities

5.1 Training materials license

IFLA training packages are licensed as Creative Commons Attribution Non-Commercial 3.0 (Unported): <http://creativecommons.org/licenses/by-nc/3.0/> unless otherwise indicated.

In addition, IFLA makes available training packages to IFLA members under the conditions that IFLA is attributed as Author and IFLA's name and logo remains attached to all copies and versions. IFLA retains the authority to request changes to content should any adaptations conflict with endorsed IFLA policies.

5.2 Issuing of certificates

BSLA has become an important brand and identify for IFLA and for those that participate in the programme. IFLA will issue certificates using its name and logo in accordance with its branding guidelines², and for projects sponsored or in partnership with IFLA only. ie, IFLA does not issue certificates in its name to workshop participants for 'non-official' projects.

IFLA retains the right to decline issuing of certificates to trainers, participants for any reason. Certificates of appreciation or participation do not imply endorsement of a specific skill.

² <http://www.ifla.org/publications/guidelines-on-ifla-branding>

6 Trainers

IFLA accredits trainers to deliver training and other activities as part of the Building Strong Library Associations (BSLA) programme. Trainers have national association experience and the ability to put their knowledge into practice through training.

IFLA emphasizes the development of existing facilitation skills, selecting trainers who already have some experience in delivering presentations, training colleagues, and working with library associations.

IFLA trainers are accredited to deliver training packages. They may organise cascade workshops in their own library communities, or be asked to facilitate IFLA workshops in other countries. IFLA provides training and support to accredited trainers.

6.1 What is the role of IFLA trainers?

Trainers play a key facilitation and mentoring role by delivering workshops using IFLA content. Trainers are responsible for:

- Continuing to develop their knowledge of IFLA's training packages
- Planning the content of workshops using the BSLA materials, in collaboration with IFLA
- Delivering workshops and other activities in country
- Collaborating with colleagues to cascade learning throughout their country
- Communicating with other participants between meetings, primarily using the IFLA online platform
- Assisting with identifying contacts in other associations to serve as mentors for specific topics
- Contributing to the evaluation of BSLA activities and collecting participant feedback

Trainers work on a voluntary basis, and receive reimbursement for their expenses.

6.2 What skills do trainers need?

Trainers who deliver workshops using IFLA materials need to have:

- Excellent communication skills

- Confidence in their knowledge of topics covered by the IFLA training materials, and ability to deliver sensitive topics
- Ability to facilitate group discussions and activities
- Internet and computer skills, to be able to communicate with other trainers and use the IFLA online platform
- Strong contacts and networks within their own country
- Wide-ranging experience in library work, national library associations, other relevant organisations
- Ability to promote IFLA confidently and effectively in their country

IFLA Trainers deliver training and activities in both a face-to-face and online learning environment depending on the needs of each library community. The blended options could range from totally online or totally face-to-face to a mixture of face-to-face and computer mediated learning environments.

6.3 Trainer responsibilities before and during activities

IFLA's trainers may deliver one or several workshops in a country. Trainers will be delivering training and activities in both a face-to-face and online learning environment depending on the needs of each library association. For example, some trainers have delivered training by Skype.

Trainers:

1. Liaise with the in-country association contact and IFLA to organize training and other activities in-country
2. Have knowledge of all of IFLA's BSLA training packages, and are able to deliver any one of them according to the needs of the association. They customise training as needed to suit local conditions, including selection of case studies, activities and discussions.
3. Deliver training and other activities for up to a week at a time in-country
4. Are available to answer questions between activities (eg by email)
5. Are involved in assessing the impact of the programme using the impact evaluation framework in liaison with the association and IFLA

6.4 Becoming accredited as an IFLA trainer

Regional trainer workshops

IFLA holds training workshops in different regions of the world. Attending a regional workshop gives accreditation as an IFLA trainer.

During the workshop, participants:

- Take part in group activities to demonstrate their understanding of training and facilitation skills
- Receive feedback from their peers about their presentation skills and knowledge of BSLA content

Regional trainer workshops introduce participants to the BSLA training package, the IFLA approach to training, evaluating training using impact evaluation, and group training techniques. The workshops aim to reinforce participants existing facilitation skills – many participants come to the workshops with experience in delivering presentations or training. Trainers work as facilitators in partnership with colleagues during training.

Regional training workshops are also a significant professional development opportunity for participants, providing new skills that can be used in the BSLA programme and in their own workplace.

In addition to gaining new skills during the workshop, participants are introduced to concepts of reflective practice to record their learning.

Trainers will receive a certificate from IFLA at the end of the workshop recording their attendance.

After attending a regional trainer workshop, IFLA trainers should:

1. Understand and apply training approaches best suited to meeting adult learning preferences in the context of IFLA training
2. Explain and use a range of learning activities appropriate to the BSLA content
3. Understand and explain the BSLA programme, scope and rollout model, including potential other uses of the programme
4. Be able to customise the content for local cultural and language conditions, using IFLA developed exemplars and other resources in consultation with the country and IFLA teams

5. Be able to deliver the programme in the range of delivery modes (face-to-face and flexible) and models to be adopted by IFLA
6. Understand the principles and purpose of impact assessment and the trainers' role in implementing the impact assessment framework
7. Be ready to participate in and contribute to the IFLA Trainers' community of practice

Other ways to become accredited

IFLA accredits specialist trainers on the basis of their expertise in different subjects and training. For example, selected FAIFE and CLM committee members are accredited to deliver IFLA's policy-based training materials.

Trainers may also be former participants in BSLA activities in their own country, and serve as peers/co-trainers to other associations.

6.5 How trainers are assigned to projects

The match between a trainer and project is critical to the success of the project. Considerations include matching trainer expertise and association needs, language, cultural context, and availability as all trainers serve on a voluntary basis and have a number of other commitments. As multiple activities are generally taking place at any one time, Headquarters generally coordinates selection of trainers having the overview of all ongoing activities.

Headquarters recommends a trainer to projects unless a project has a specific project in mind or a trainer has a past history with a specific country that makes them ideally suitable to serve as a trainer.

In general, IFLA will support one trainer per project, but in some cases two trainers have worked together or in a co-trainer model to build up new trainers locally. Trainers usually work in the language of the country, or occasionally through interpreters.

Trainers are invited to participate in projects, and may decline for any reason such as unavailability due to work commitments. In such a case, Headquarters will identify alternate trainers.

6.6 Training register

IFLA maintains a list of trainers and which training packages they are accredited to deliver. Trainers are available to deliver BSLA, IFLA ALP, FAIFE and other training projects.

Staying up to date

Accredited trainers:

- Participate in and contribute to the IFLA Trainers' community of practice
- Keep up to date with new versions of the IFLA training package, and new training modules
- Where possible, attend trainers meetings and events at IFLA Congresses and activities in their own region

See also: Annex 5

List of accredited BSLA trainers

6.7 Planning and delivering workshops

Detailed guidance has been prepared on planning and delivering workshops.

See also: Annex 6

BSLA Introduction and Trainers Guide

7 Planning and delivering projects

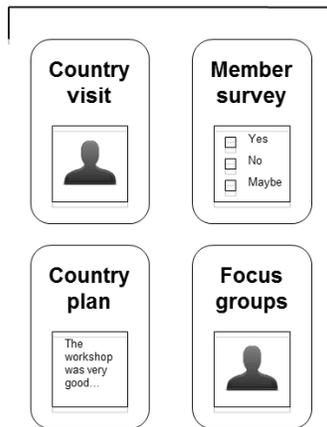
Associations may implement BSLA in their own association at any time by downloading the training materials and further guidance like this manual from the website. The steps below relate to projects and other activities directly supported by IFLA through funding, partnerships or other means. The steps and process may vary depending on the type of support and/or funding available at any time. All project support is subject to available funding and there is no set deadline for calls for projects.

The steps in a potential BSLA project can be broadly summarized as follows:

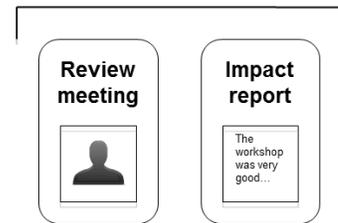
1. Association learns about the programme by attending a BSLA activity, reading materials online and may contact IFLA for advice
2. When IFLA calls for project proposals, association may:
 - Be invited to submit a proposal to attend a regional workshop or meeting that will be followed by a project proposal projects and/or
 - Respond to an open call for project proposals
3. Association should call a meeting of their board to discuss any potential proposal, to secure commitment from the board, and letters of support for the project. Letters of support should come from the Board/Executive Committee of the association, organisations providing in-kind support, and other organisations as relevant to the success of the project. ALP will seek evidence of the association's commitment to the BSLA project
4. Draft proposals are submitted to the IFLA Regional Office or the Management of Library Associations section where relevant, and/or IFLA Headquarters for initial feedback
5. The association works to revise their proposal. Revised proposals are then submitted to ALP for consideration and endorsement. ALP may send a request for feedback that must be addressed
6. Once all feedback has been addressed, ALP will either approve or decline the project
7. The formal project approval process will then begin, including a Memorandum of Understanding (MOU) between IFLA and the association. The association will be required to submit narrative and financial reports during and at the conclusion of their project.
8. Headquarters, trainers, and the association remain in contact between the proposal stage and the conclusion of the project. At the end of the project, all finances must be reconciled and a full narrative and impact report submitted.

Activities delivered in a BSLA project can include preparation, surveys and evaluation, as well as the workshops:

Beginning of the project



End of the project



8 Planning and delivery: From the Headquarters/Programme manager's perspective

Programme governance (ALP)

ALP oversees the programme and makes recommendations on strategy and activities. Its members include the Chairs of Division V and the Management of Library Associations section, ensuring representation from a broad geography and associations.

ALP reports to the Governing Board on the progress of programmes and the implementation of activities.

ALP assesses projects at its meetings and throughout the year as required, as funds are available. The types of projects may include support to:

- Implement BSLA workshops and activities at existing events eg national and regional library association conferences
- Deliver projects in-country, such as a series of BSLA workshops and activities
- Implement IFLA advocacy projects or policies
- Undertake projects bringing together a smaller number of associations in the region to form alliances or partnerships in pursuit of advocacy goals.

8.1 Project proposal guidelines

- The ALP committee assesses applications for projects and project funds

- Additionally, the regions may nominate an additional person to provide expertise.

Assessing the applications

Prospective projects should be judged individually according to the stated criteria. For this reason, projects are not ranked, but assessed on their own merits.

All applicants are required to complete the relevant application form and provide the following information

- The need, specific goals and expected outcomes for the project
- Outline of project activities
- Capacity to carry out the project. A letter from the proposed host institution or library association outlining how they will support the project, description of facilities, and responsibility for financial payments and logistics should be attached to the application
- Support for the project from relevant associations, organisations, IFLA
- Outline of how the library community will be invited to participate in the project, and plans for cascading training and activities
- Outline of how the project will be promoted
- How any new learning materials or translations created for the project will be made available to IFLA for use in other projects
- A detailed budget
- How the impact of the project will be evaluated.

Selection criteria

Readiness to carry out the project: the library and broader social/political/economic environment is receptive to library development

Ability to carry out the project: The Association has the capacity to implement the project.

Projects are selected for success and likely impact.

Costs that cannot be supported in projects

IFLA does not support projects that are intended for the purchase of equipment, scholarships or in-service training. IFLA does not pay fees or honoraria to staff or consultants for a project.

Reimbursement of reasonable trainer and participant expenses (flights, accommodation) are permitted in the budget.

Where the project budget indicates that funds would be spent on items that are not permitted, for example, staff or equipment, projects must either raise additional funds on their own to fund this or agree to remove such items from their project budget.

Consultation

Consultation with relevant IFLA sections and regional offices is encouraged. Project proposers may be asked to answer further questions about their application before a decision is finalised.

Feedback to applicants is encouraged. This is in response to requests for more information to be sent to unsuccessful applicants, in particular, to guide them in improving their applications to IFLA/ALP or other organisations for the future.

8.2 What makes a successful proposal?

Successful proposals are able to clearly articulate the needs of the association and the state of the library sector in their country, and demonstrate support for the project from their Board. They may also include issues such as:

- Future-looking plans for the changing nature of the sector
- Partnership with organisations that can provide in-kind support like workshop space, shared staff
- Local funding opportunities
- Opportunities for BSLA workshops at national or regional conferences
- Strengthening membership, governance, partnerships
- Collaborating with other associations at this meeting, or in the region

See also: Annex 7

BSLA project proposal form

See also: Annex 8

Sample project proposal – "Leadership for municipal public libraries: training of 12 trainers who will deliver a cascade training throughout the country", Bulgarian Library and Information Association

This is an application for a leadership training of trainers programme submitted by the Bulgarian Library and Information Association. The project was supported by

IFLA ALP in 2011. The application is a good example of the background information that should be provided, detail required in the needs analysis and project activities, and a clear budget. The project outlines how the programme will meet specific training and development needs for librarians in the country, and plans for how the learning will be cascaded to other cities and librarians.

IFLA ALP thanks the Bulgarian Library and Information Association for giving permission to make their application available.

See also: [Annex 9](#)

Project assessment form

8.3 Project acceptance and MOU

After a proposal is accepted by ALP, the process to formally approve and start the project begins. IFLA will draw up a Memorandum of Agreement (MOU) with the association, which outlines the roles and responsibilities of IFLA and the association in the project with regard to:

- Support to implement the project
- Communication about the project
- Planning of activities
- Finances and financial reports
- Narrative and impact reporting requirements
- Intellectual property ownership and record keeping

This must be countersigned by IFLA and the association before the project can commence.

[Annex 10](#)

MOU Template

The following documents should be attached to the MOU:

- | |
|---|
| <ul style="list-style-type: none">- Approved project proposal and budget- Guidelines for financial reports- Guidelines for narrative and impact reports |
|---|

8.4 Project implementation

Associations manage the implementation of their projects, with guidance from IFLA, the Regional Offices, their trainer and others as required.

8.5 Transfer of funds

No funds will be transferred for any purpose in a project without prior approval as per the terms of the MOU. Funds will only be transferred together with an invoice with quotes or receipts for reimbursement. This is a requirement of IFLA's auditors.

Under no circumstances will any expenses or project funds be paid out in cash.

8.6 Project reporting

IFLA monitors the progress of projects on a regular basis. Projects are required to report on their progress:

- To receive subsequent tranches of funds (where MOUs specify more than one payment in a project)
- To keep IFLA informed about any issues that need course correction
- To note success stories throughout the duration of a project

Requirements for impact evaluation throughout the project are detailed separately under the section on impact evaluation.

In addition to reporting to IFLA, it is good practice for participating associations to update MLAS and the relevant regional section, as well as the association's own members throughout the project. These updates could include reports during meetings of relevant IFLA sections, written narrative reports, news on their website and social media, or other means of updates. IFLA also publishes reports about all projects on the website and social media, based on the narrative reports submitted, and hosts sessions at the IFLA Congress on current projects supported by ALP.

Reporting deadlines are specified in the MOU. The main reporting requirement is at the conclusion of a project. Financial and narrative reports (including statement of impact) are due no later than 3 months after the conclusion of a project. Together

with the reporting guidelines, templates for reporting are provided to all projects to streamline the process.

See also: Annex 11

Template for final narrative and impact reports

See also: Annex 12

Blank invoice for financial reports

8.7 Variance

As outlined in the MOU, approval for major variance to expenditure, activities or other variance must be approved in writing by IFLA before any changes or expenditure occurs in a project. In the case of activities costing less than forecast, associations may make a brief proposal to IFLA regarding the use of the leftover funds. For example, running an additional workshop for members would be an acceptable use of leftover funds.

8.8 Project closure

Projects are deemed closed after all narrative and financial reports have been received, any remaining funds have been transferred back to IFLA or alternate spending has been approved, and any outstanding questions on the reports have been addressed.

9 Planning and delivery: From the association's perspective

For some associations, BSLA may be the largest project they have implemented in terms of funding and scale. BSLA has worked with associations as small as 30 members, and as large as 5000, but many of the challenges in project management are the same no matter the size of association. As most operate on a voluntary basis, IFLA recognises the commitment made by volunteers to their association and to the project and therefore aims to keep reporting and administration requirements relatively low.

9.1 Before submitting the proposal

There are a number of issues and questions every association must address as they develop their proposal:

What needs will this project help fulfil?

- What needs would BSLA fulfil that are not being met by other projects in our country?
- Do we understand the objectives of the BSLA programme and what it can achieve? How would the programme benefit us?
- What are our association's strengths? And our challenges? Are we able to agree on these in our board?

What is the purpose of this project?

- What activities do we want in this project, eg workshops, meetings?
- Can we work with other associations to implement this project?
- How will we follow up the outcomes of workshops and meetings?
- Are there any risks in this project?

Who needs to be involved?

- Who will plan the project and be the main contact with IFLA?
- Who will make sure the board is informed and supports the project?
- Who will be invited to take part in workshops and meetings? Can they participate in all the activities (and do they have permission to take time off work)?
- Who will take care of the logistics, accommodation, venue and travel for participants?
- Have we made sure that all the work for this project will be done by a team, not only one person?
- Where will we hold activities? Is it easy for participants to travel to that location, and is it suitable for meetings and workshops?
- What is the budget for the project?

Another way of thinking through the association's needs is for the board to meet to put together a brief presentation about the association:

- Pretend that you need to give a 5-minute presentation about the association to important policymakers in your country, or your most important partners.
- What do you want them to know?
- Where do you need assistance to be a stronger association?
- How can you help support them in achieving their goals?

See also: Annex 13

Association presentation template

9.2 Implementing the project and planning workshops

After the project is approved, IFLA and the trainer will work closely with the association to review invitees for activities, dates, content to be delivered in workshops and other topics. For many projects, workshops are important activities because they involve the participation of an international trainer and must be carefully planned in advance.

Typical timelines for a national-level workshop are included below. International/regional workshops extend by up to 3 months longer due to time to process visas and organise travel:

3 months before:

- Agree on dates and topic of training. Confirm participation of trainer
- send materials for translation
- feedback to team about any previous activities to course correct or build on success if necessary
- budget submitted and approved
- invoice for payment prepared and approved

2 months before:

- book travel, accommodation for trainer

1 month before:

- programme confirmed
- participants invited
- participant accommodation and travel booked

- Trainer airport transfers confirmed
- Any pre-reading is sent out

During workshop:

- Participant certificates printed

2 weeks after:

- financial report submitted
- narrative report (for website) submitted

6 weeks after:

- send post-workshop evaluation survey out to participants
- other impact evaluation as requested

8 weeks after:

- receive and compile results of workshop evaluation
- plan next activity
- Follow up actions from the workshop completed

10 Impact evaluation

Impact evaluation of the BSLA Programme should be useful to the National Library Associations involved and to IFLA. For the National Library Associations, the evidence provided through impact evaluation should:

- tell participants whether they are making real progress towards their development goals and provide a focus for sustained and systematic development planning
- help to build organisational capacity by giving staff the confidence to build on successes
- raise awareness of the Association in the sector and amongst decision makers
- give the Association evidence as a basis for sustained advocacy in support of programme goals, such as:
 - better services for members and users
 - more respect for the library sector and the library community
 - more collaboration with other associations, partnerships and regional participation.

- help to secure the resources that the Association needs through evidence-based working in order to develop a healthier and more viable professional base.

For IFLA, impact evaluation evidence will enable decisions to be made about how to deliver the BSLA Programme and on what scale. More generally it will help to sustain the organisation and its programmes, share project findings with members and in doing so raise the IFLA profile by showing what the organisation is doing to help national Library Associations and how this work is contributing to advocacy on behalf of libraries.

IFLA provides a number of tools to associations to help them measure their impact. IFLA Headquarters manages impact evaluation overall, and supports monitoring and evaluation throughout projects.

See also: Annex 14

Evaluating Small Projects within the BSLA Programme

10.1 Introduction to impact evaluation in BSLA

See also: Annex 15

Evaluation Framework – Full Framework for Programme Managers

Evaluation Framework – Regional framework

10.2 Stage 1 impact assessment (beginning of project):

Now that your project is underway, plans for how you will evaluate the project. It is very important, as you are getting started, that you now conduct a survey of your members and non-members to better understand their perception of your association as it currently stands. This will help you to make sure that the project will address these needs, and it will also help you to show your progress to members at the end of the project.

Another important reason why we evaluate BSLA projects is so that IFLA can report to our members and to our funders about the impact that the programme has. This is very important so that we can continue to develop the programme.

There are a number of steps in impact evaluation:

1. The first is the member and non-member survey. This is repeated at the end of the project so that you can measure the change in perceptions. It can be a good idea to partner with a library school on the analysis – it is a good project for a student or researcher.
2. [Optional Focus groups – run this after you have the results of the survey to drill down into the issues].
3. Gathering documentation about the association. This could include minutes of board meetings, newsletters, messages to members or government officials, membership numbers.
4. Post-workshop survey - finding out how people have changed as a result of activities.
5. Stories of change – understand the most significant change that happened for participants.
6. Fill in the final narrative report for IFLA at the end of the project

The first step is to carry out the survey.

See also: Annex 16

Impact stage 1 documents for associations:

Member and non-member survey (start of project)

10.3 Stage 2 impact assessment (after some project activities completed):

Now that you have carried out the first activities in your project, complete the second stage of project evaluation. It is very important that you take the time to evaluate your project so that you can plan future activities, advocacy and programmes for members according to the perception of your association as it currently stands.

This stage of impact evaluation includes:

1. Focus groups

You can run focus groups after you have received the results of the member and non-member survey to drill down into the issues, or separately on a specific topic on the theme of your project if you have not had the chance to do a survey. For example, you could run a focus group about your advocacy plans or to get feedback on your draft strategic plan, depending on the topic of your project.

2. Documentation about the association

Collect documents about the association including minutes of board meetings, newsletters, messages to members or government officials, membership numbers, media about the association or the library field. You should collect documents that were created before the project started, and current documents. The purpose is for IFLA HQ to help review these with you, to identify patterns of change and progress towards your goals over time.

3. Post-workshop survey

You can send this survey to participants in workshops and other activities, approximately 6 weeks after the workshop. The purpose of this survey is to find out how people have changed as a result of the activities. It is possible to email or mail this survey, or to carry out the survey using the questions by phone.

See also: [Annex 17](#)

Impact stage 2 documents for associations:

Document analysis
Focus group template
Post-workshop assessment form

10.4 Stage 3 impact assessment (end of project):

This stage of evaluation revisits the member survey to measure change that has happened since the project began.

See also: [Annex 18](#)

End of project documents for association:

Perceptions of change template
Member and non-member survey (end of project)