**Appendix 1. Toolkit for Conducting a Local Needs Assessment**  
  
The survey instrument and spreadsheets used for analysis have been adapted as customizable Google templates so that librarians at other institutions can conduct training needs assessments using these tools. The toolkit consists of two documents:

* Overview and planning worksheet:<http://bit.ly/UyVXFh>
* Survey and analysis template:<http://bit.ly/SUSQGk>

The overview and planning worksheet provides background information and factors to consider when designing the needs assessment. It also includes step-by-step instructions for customizing the survey and analysis template to reflect local training themes and topics.  
  
Once the survey and analysis template has been customized, the link to the survey can be sent to potential trainees in order to collect data about training priorities and preferences. Results from the survey will automatically populate the analysis sheet and calculate an overall indicator of training need for each topic (highlighted in yellow). This information, in addition to the qualitative data gathered from the free text responses, can be used to inform the design of a local training agenda.  
 **Appendix 2. Survey Instrument**

Training Needs Assessment

1. How many years have you been a librarian?

* 0-2
* 3-5
* 6-10
* 11+

2. Please identify your department:

* Archives and Special Collections
* Arts and Humanities
* Circulation
* Libraries Information Technology
* Metadata Services
* Scholarly Resource Development
* Sciences
* Social Sciences

For questions 3-5, please indicate how much you agree or disagree with the given statement for each of the topics listed.

3. This topic is relevant to my job NOW:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Strongly Disagree | Disagree | Neither Agree nor Disagree | Agree | Strongly Agree |
| Author Rights |  |  |  |  |  |
| Copyright |  |  |  |  |  |
| Data Analysis/Manipulation |  |  |  |  |  |
| Data Citation |  |  |  |  |  |
| Data Lifecycle |  |  |  |  |  |
| Data Management Plan Consultation |  |  |  |  |  |
| Data Sharing |  |  |  |  |  |
| Data Preservation |  |  |  |  |  |
| Finding Data |  |  |  |  |  |
| Funder Mandates and Policies |  |  |  |  |  |
| Institutional/Disciplinary Repositories |  |  |  |  |  |
| Metadata/Data Documentation |  |  |  |  |  |
| Open Access |  |  |  |  |  |

4. This topic will be relevant to my job in FIVE YEARS:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Strongly Disagree | Disagree | Neither Agree nor Disagree | Agree | Strongly Agree |
| Author Rights |  |  |  |  |  |
| Copyright |  |  |  |  |  |
| Data Analysis/Manipulation |  |  |  |  |  |
| Data Citation |  |  |  |  |  |
| Data Lifecycle |  |  |  |  |  |
| Data Management Plan Consultation |  |  |  |  |  |
| Data Sharing |  |  |  |  |  |
| Data Preservation |  |  |  |  |  |
| Finding Data |  |  |  |  |  |
| Funder Mandates and Policies |  |  |  |  |  |
| Institutional/Disciplinary Repositories |  |  |  |  |  |
| Metadata/Data Documentation |  |  |  |  |  |
| Open Access |  |  |  |  |  |

5. I am able to explain the main issues surrounding this topic to a researcher:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Strongly Disagree | Disagree | Neither Agree nor Disagree | Agree | Strongly Agree |
| Author Rights |  |  |  |  |  |
| Copyright |  |  |  |  |  |
| Data Analysis/Manipulation |  |  |  |  |  |
| Data Citation |  |  |  |  |  |
| Data Lifecycle |  |  |  |  |  |
| Data Management Plan Consultation |  |  |  |  |  |
| Data Sharing |  |  |  |  |  |
| Data Preservation |  |  |  |  |  |
| Finding Data |  |  |  |  |  |
| Funder Mandates and Policies |  |  |  |  |  |
| Institutional/Disciplinary Repositories |  |  |  |  |  |
| Metadata/Data Documentation |  |  |  |  |  |
| Open Access |  |  |  |  |  |

6. Do you currently interact with researchers about any of these topics?

|  |  |  |
| --- | --- | --- |
|  | No | Yes |
| Author Rights |  |  |
| Copyright |  |  |
| Data Analysis/Manipulation |  |  |
| Data Citation |  |  |
| Data Lifecycle |  |  |
| Data Management Plan Consultation |  |  |
| Data Sharing |  |  |
| Data Preservation |  |  |
| Finding Data |  |  |
| Funder Mandates and Policies |  |  |
| Institutional/Disciplinary Repositories |  |  |
| Metadata/Data Documentation |  |  |
| Open Access |  |  |

7. For each of the topics listed, please complete the following statement using the scale below:I feel \_\_\_\_\_\_\_\_ about discussing this topic and related issues with researchers.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Very Anxious | Anxious | Neutral | Comfortable | Very Comfortable |
| Author Rights |  |  |  |  |  |
| Copyright |  |  |  |  |  |
| Data Analysis/Manipulation |  |  |  |  |  |
| Data Citation |  |  |  |  |  |
| Data Lifecycle |  |  |  |  |  |
| Data Management Plan Consultation |  |  |  |  |  |
| Data Sharing |  |  |  |  |  |
| Data Preservation |  |  |  |  |  |
| Finding Data |  |  |  |  |  |
| Funder Mandates and Policies |  |  |  |  |  |
| Institutional/Disciplinary Repositories |  |  |  |  |  |
| Metadata/Data Documentation |  |  |  |  |  |
| Open Access |  |  |  |  |  |

8. Based on your experience, please describe any specific concerns that you have related to the research and scholarly communication topics covered in this survey (author rights, copyright, data analysis/manipulation, data citation, data lifecycle, data management plan consulting, data sharing, data preservation, finding data, funder mandates/policies, institutional/disciplinary repositories, metadata/data documentation):

9. If applicable, please provide one example of how you have worked with researchers on any of the topics covered in this survey (author rights, copyright, data analysis/manipulation, data citation, data lifecycle, data management plan consulting, data sharing, data preservation, finding data, funder mandates/policies, institutional/disciplinary repositories, metadata/data documentation):

10. Which of the following training opportunities/formats would you be interested in (select all that apply)?

* Informal discussions (brown bags)
* Multi-day workshops
* One-day workshops
* One-on-one consultations
* Online tutorials
* Panels/presentations
* Print handouts/guides
* Webinars
* Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

11. Please provide any additional comments you have: