

# **Expanding The Reach of Reference:** training access services staff to provide ready reference at the University of Michigan Library

Presenters: Jasmine Pawlicki and Shannon Moreno

Back In Circulation – 10/10/16

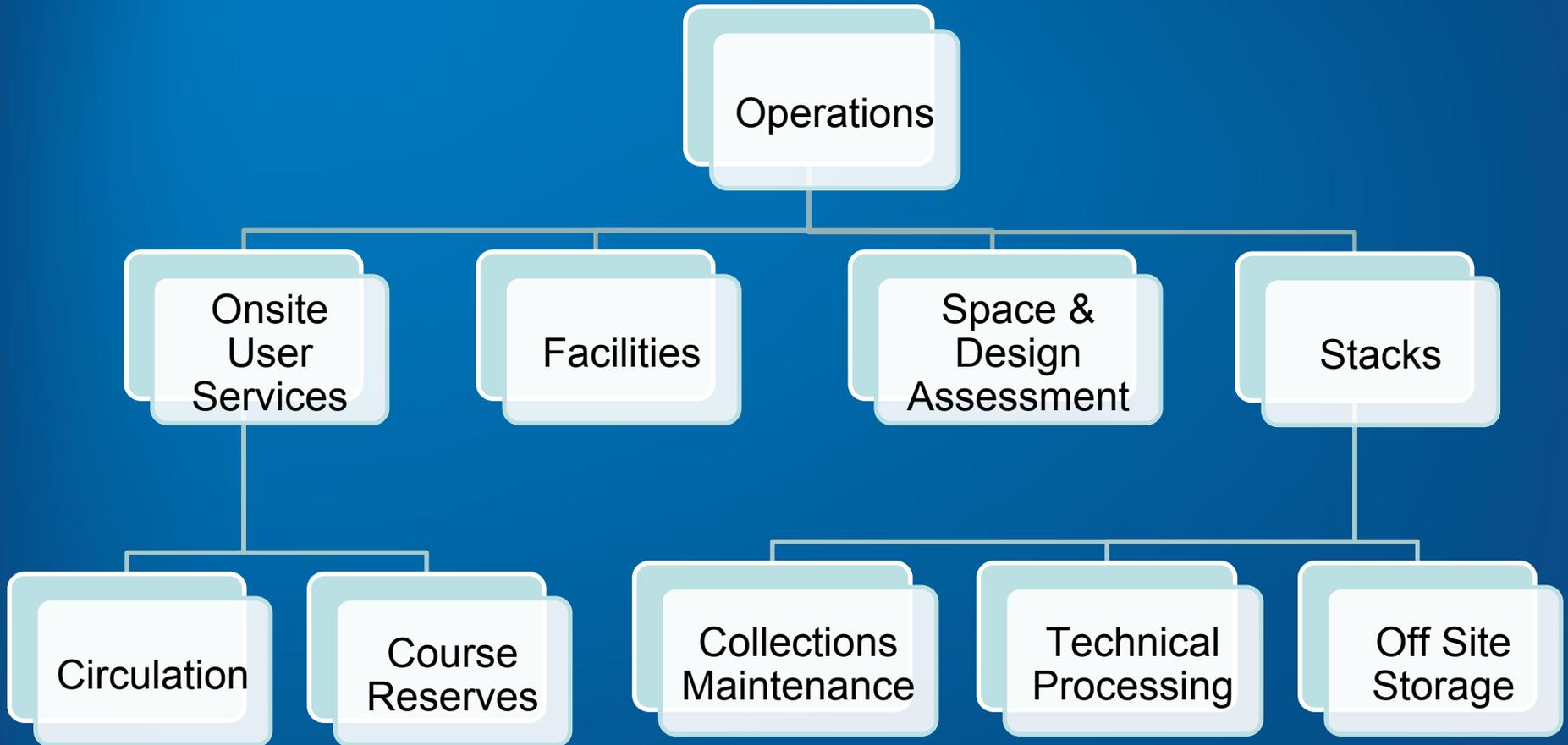


# Our Charge – Mission From our AUL

The Operations Information Services Working Group (OISWG) is convened to enhance user information services at Operations service points throughout the MLibrary system and has been charged with developing a staff training program to ensure that all Operations staff have the same foundation of information services training. The training covers guidelines and expectations for information service professionals, finding information about the library, campus, and surrounding communities, library technology services and issues, search strategies, using the library catalog, and understanding databases. The training session debuted in late October 2015.



# Operations – Who we are



# Our Team – Original Cast

Sanam Arab - Access Services Librarian

Jaclyn Sipovic - Temp in Serials and Research

Jasmine Pawlicki - User Services, Peer Information Counseling (PIC), Reserves

Shannon Moreno - Buhr Storage Facility, Stacks, Previous Circulation & Reference experience



# Implementation Team

Addition:

Ariel Ojibway - User Services, Student  
Training

The never ceasing constant:

Jasmine Pawlicki and Shannon Moreno



# First Steps...

Identify  
Service  
Points

Levels of  
Service  
Analysis

SWOT

Create  
FAQs

# Findings



You're gonna need a bigger training

Created by Oliviu Stoian  
from Noun Project



# Training the Trainers



## Reference Boot Camp:

Workshops

Reference training from Reference Staff

Qualtrics overview with experts

## Existing resources:

Online tutorials and videos



# Qualtrics

Qualtrics is a research software that is commonly used for conducting surveys

Why Qualtrics?

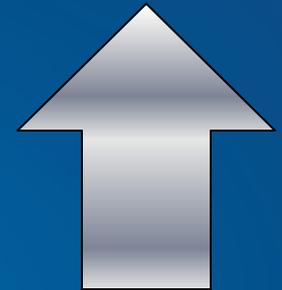
Access, on hand expertise, and easy platform to wield

# The Up Side of Qualtrics

Easy to use

Allows for independent work that can be brought back to the group

Keeps a question library so content can be added as needed

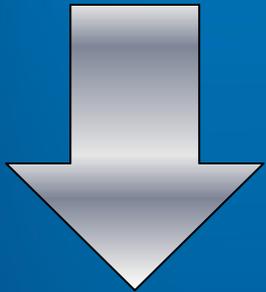


# The Down Side of Qualtrics

Distribution and tracking are clunky

No editing active surveys

Not able to reference materials once completed



# Development



Created by Kevin Augustine LO  
from Noun Project

Audience - Different libraries,  
students, staff (new and experienced)

Mission - Customer Service and Empathy

Design – Tiered knowledge model

# Content:

## Guidelines for Information Service Professionals Safety

### Session 1: General Library and Campus Information

- 1.1 Introduction to the Library Website
- 1.2 Campus and Community Information

### Session 2: Library Information Technology

- 2.1 Common Technology Issues
- 2.2 Tech Suites and Services

### Session 3: Search Strategies, Library Catalog, and Library Databases

- 3.1 Search Strategies
- 3.2 Library Catalog
- 3.3 Introduction to Library Databases

## Referrals





# operations service point training



**Discover** questions are used to put your information skills to practice.

**Imagine** sections are used to exemplify common scenarios.



**Remember** statements are meant to keep larger goals in mind.



**Notes** highlight important pieces of information not necessarily spelled out in information resources.

**Teaching Moments** are presented to provide steps you can take to help increase information literacy among our patrons.



# Guidelines for Information Service Professionals

## Visibility and Approachability

The RUSA Expectations in the area of Visibility/Approachability that are most relevant to our work in Operations are:

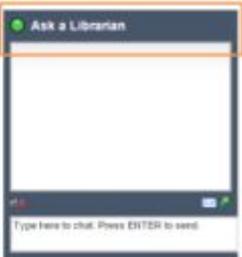
- Being approachable and ready to assist patrons by acknowledging patrons entering your area
- Smiling
- Using a friendly/conversational tone
- Using eye contact and appropriate body language
- Remaining visible as much as possible
- Determining which patrons need assistance and whether they will need a brief circulation transaction or basic reference help
- Acknowledging patrons waiting for assistance

# Session 1 General Library and Campus Information

## 1.1 Introduction to the Library Website

**Note: Ask A Librarian**

**Note:** Librarians are online when the dot in the Instant Message application is green.



The screenshot shows a chat window with a green status indicator and a text input field. The text input field contains the text "Type here to chat. Press ENTER to send."

If you are at a service desk and have difficulty answering a question about the library or believe the question would best be answered by a librarian, you can suggest our Ask a Librarian services for patrons calling by phone or whose time is limited.

## 1.2 Campus and Community Information

### University of Michigan Website

[Umich.edu](http://Umich.edu) is the official homepage for the University of Michigan, Ann Arbor. It is also the portal through which students, staff and faculty find the resources required to navigate their academic and professional careers at the University of Michigan. Many of you may already be using the University of Michigan website to connect to your email or CTools/Canvas accounts.

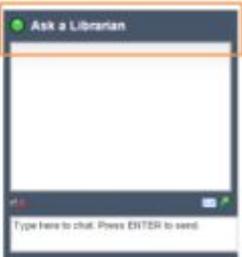


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The screenshot shows an Instant Message window with a title bar that says "Ask a Librarian". The window has a green dot in the top left corner, indicating that a librarian is online. The main area of the window is empty, and there is a text input field at the bottom with the placeholder text "Type here to chat. Press ENTER to send."

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# Session 2 Library Information Technology

## Referrals

## 2.1 Common Technology Issues

### Software Guides

Being a computer expert isn't a prerequisite to helping patrons with software issues. The Library has created [research guides](#) to help patrons use certain products, and there are basic [technology guides](#) that might be pertinent to the user. There are guides for myriad subjects such as properly using [iBooks](#), [iDesign](#), and [Photoshop](#). These can be accessed by doing a keyword search on the website, or by browsing through the technology section of the research guides.



## 2.2 Tech Suites and Services

### Note: Computing Sites



**Note:** MLibrary houses several kinds of computing areas or labs. The [CAEN computer labs](#), which provide specific types of engineering software, are only for College of Engineering students and faculty. The CAEN computer lab on Central Campus is located in the Shapiro basement.

### Referrals

#### What is a Referral?

A referral is the act of referring someone to a specialist.

#### When do you make a referral?

Referrals should be made when you have exhausted the tools you have just learned, and can no longer help the patron using the skills you already possess. Or a referral can happen much earlier in the process. If the patron comes to you with a reference question and you know that they should probably talk to a specialist, then that would be when you make the appropriate referral.

#### Who do you make the referral to?

The library has numerous specialists. The best bet option is to perform a subject search related to the query of the patron.

#### Ex: Biology

Search for biology, and look for the Subject Specialist under the Ask a Librarian section:



#### Results for: biology

Catalog (Mirlyn)	Databases	Research Help
<p><a href="#">Biology</a> <b>Author:</b> Raven, Peter H. <b>Published:</b> 2005 <b>Format:</b> Book</p>	<p><a href="#">Biology</a> Explains biological concepts and explores related fields as well as the history of biological science. Discusses critical issues such ...</p> <p><a href="#">Current Protocols in Cell Biology</a> Developed by leading scientists in the field, Current Protocols in Cell Biology is an essential reference for researchers who study the ...</p>	<p><a href="#">Ask a Librarian</a></p> <p>Talk to a Specialist about Biology</p> <p> <b>Scott A. Martin</b> Biological Sciences Librarian (734) 536-2337 samart@umich.edu</p>



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# Session 3: Search Strategies, Library Catalog, and Library Databases

## 3.1 Search Strategies

### Reference Interview

The reference interview often arises from one of the following scenarios:

- Users ask for broad pieces of information when they need a specific piece of information
- The keywords in a patron's question are ambiguous
- The patron has a misconception about a topic

Example:

**Patron topic:** books on plays

**Topic after brief reference interview:** Arthur Miller monologues

**Patron topic:** stuff about housing

**Topic after brief reference interview:** tenants rights in Ann Arbor

**Patron topic:** pictures of Jesus

**Topic after brief reference interview:** 9th century Christian murals

**Key factors in the Basic Reference Interview:**

- **Visibility/Approachability:** Showing interest and enthusiasm will cue people that it is OK to talk to you about their research interests.
- **Listening/Inquiring:** Repeat the information or question that you believe you heard to make sure you are on the same page.
- **Searching:** Ask if they have already begun a search and what they looked through in order to speed up the process and help you determine relevant information about the topic.
- **Follow Up:** Confirm that the patron's question was answered fully and ask if there is anything else you can do for them.

## 3.3 Introduction to Library Databases

## 3.2 Library Catalog

### What is a database

**What is a database?**

A database is a collection of information that is organized so that it can easily be accessed, managed, and updated. Databases can be classified according to types of content: bibliographic, full-text, numeric, and images.

**Frequently Used Databases:**

You'll remember from the section on the Library Website, that we pointed out the Frequently Used Databases section of the homepage. This section will be of good use to you only if you know a little bit about each database.

**PubMed @ U-M:** PubMed is a free search engine primarily accessing the MEDLINE database of references and abstracts on **life sciences and biomedical topics**.

**Google Scholar:** an online, **publicly accessible search engine** that lets users look for both physical and digital copies of articles.

**Proquest:** ProQuest databases provide a single source for scholarly journals, newspapers, reports, working papers, and datasets along with millions of pages of digitized historical primary sources and more than 450,000 ebooks. The ProQuest interface is a great place to begin researching topics within the **Social Sciences and Humanities**.

**JSTOR:** (pronounced JAY-store; short for Journal Storage) is a digital library originally containing digitized back issues of academic journals, it now also includes books and primary sources, and current issues of journals. Best used for accessing **archival material in academic journals**.

**Worldcat:** WorldCat is a "**master**" **catalog** of library materials. It's a way for you to locate a book, video or other item of interest and discover which libraries near you own the item.

### Subject Headings

Speaking of metadata, **subject headings** can be helpful when a patron would like texts related to the one they've found. The item's information record will have a subject tab that can be opened to view related subjects and academic disciplines. Below is an item located by searching the keyword "sandwich". Note all the subject headings and the disciplines found with that basic search.

The screenshot shows a library catalog record for the book "Fried walleye & cherry pie : midwestern writers on food / edited and with an intro by Staff Peggy". The record includes fields for Contributors, Format (Book), Language (English), Published (2015), Location (University of Nebraska Press, [2015]), Series Statement (44 titles), and Summary. Below the record, there are tabs for Holdings, Description, Subjects, Table of Contents, and MARC View. The Subjects (LCSRF) section is highlighted with a red box and lists various subject headings such as "Cooking, American -- Midwestern style", "International cooking -- Americans", and "Academic Disciplines".

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# Types of Questions

Which resource do you utilize most often to find a book in the UM Library?

- Mirlyn
- I've never had to find a book in the UM Library.
- Aleph
- MLibrary Search Box

## Survey

A patron would like to explore the various collections and exhibits available in the library. Which is the best path you should take to show them the best way to explore these spaces.

- Library Homepage > More events
- Search "collections" in the search box
- Library Homepage > About > Collections and Exhibits
- Library Homepage > Libraries & Departments > Special Collections Library

You are at the desk at Hatcher North and a student wants to know where in the Library they can get some help with using Photoshop. You tell them:

- The reference staff will be able to assist you
- There are some great youtube tutorials they can watch
- The staff in ScholarSpace can help you



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## Multiple Choice



# Types of Questions

Using the University of Michigan website, please look for the university's sustainability initiatives. The URL for the sustainability initiative is

and the name of the program is

## Fill In The Blank

How might you use a \* or ? for these phrases?

Archiving, Archival, Archive, Archives

### Quiz Instructions



**Discover:** Place the following call numbers in order:

1	<input type="text" value="[ Choose ]"/>
2	<input type="text" value="[ Choose ]"/>
3	<input type="text" value="[ Choose ]"/>
4	<input type="text" value="[ Choose ]"/>

- Z 6940 .K45 v.1
- Z 722 .H68 2014
- Z 6940 .K45 v.2
- Z 6940 .C381 1997
- Z 6814 .S8 M9
- Z 6814 .S9 F23 Suppl.
- Z 6940 .P241 1987
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- Z 6814 .S9 F23
- Z 7005 .S861 1992

True or False? If you search "government **NOT** Congress," then you will only get results that contain the keyword government. Any results that contain both government and Congress will not be included in your search.

- True
- False

# Types of Questions

## Sorting

### Quiz Instructions



**Discover:** Place the following call numbers in order:

1

[ Choose ]

2

3

4

[ Choose ]

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## True/False

True or False? If you search "government **NOT** Congress," then you will only get results that contain the keyword government. Any results that contain both government and Congress will not be included in your search.

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# When Questions Become Activities



**Discover:** Please take a moment to click on the Services link on the UM Library homepage. Please follow the links on the Library Services webpage to briefly learn about the following services:

1. Ask a Librarian
2. Personal Studio
3. Academic Integrity
4. 7Fast

## Navigate to Webpages



**Imagine:** Briefly describe a time when you asked someone for help and they were clearly not interested in helping you. How did you know they weren't interested? How did you feel? Did you get what you needed or did you give up?

# When Questions Become Activities



**Discover:** Please take a moment to click on the Services link on the UM Library homepage. Please follow the links on the Library Services webpage to briefly learn about the following services:

1. Ask a Librarian
2. Personal Studio
3. Academic Integrity
4. 7Fast

## Reflection



**Imagine:** Briefly describe a time when you asked someone for help and they were clearly not interested in helping you. How did you know they weren't interested? How did you feel? Did you get what you needed or did you give up?

# When Questions Become Activities

## Teaching Moment: Patrons and the Library Website



**Teaching Moment:** Whenever a patron asks you for help with a library account issue, like renewing an item, ask if they are familiar with accessing their library account using the library's website. One of our goals as Operations service points staff is to help patrons eventually be able to use the website on their own. If a patron is receptive to learning, try following the these steps:

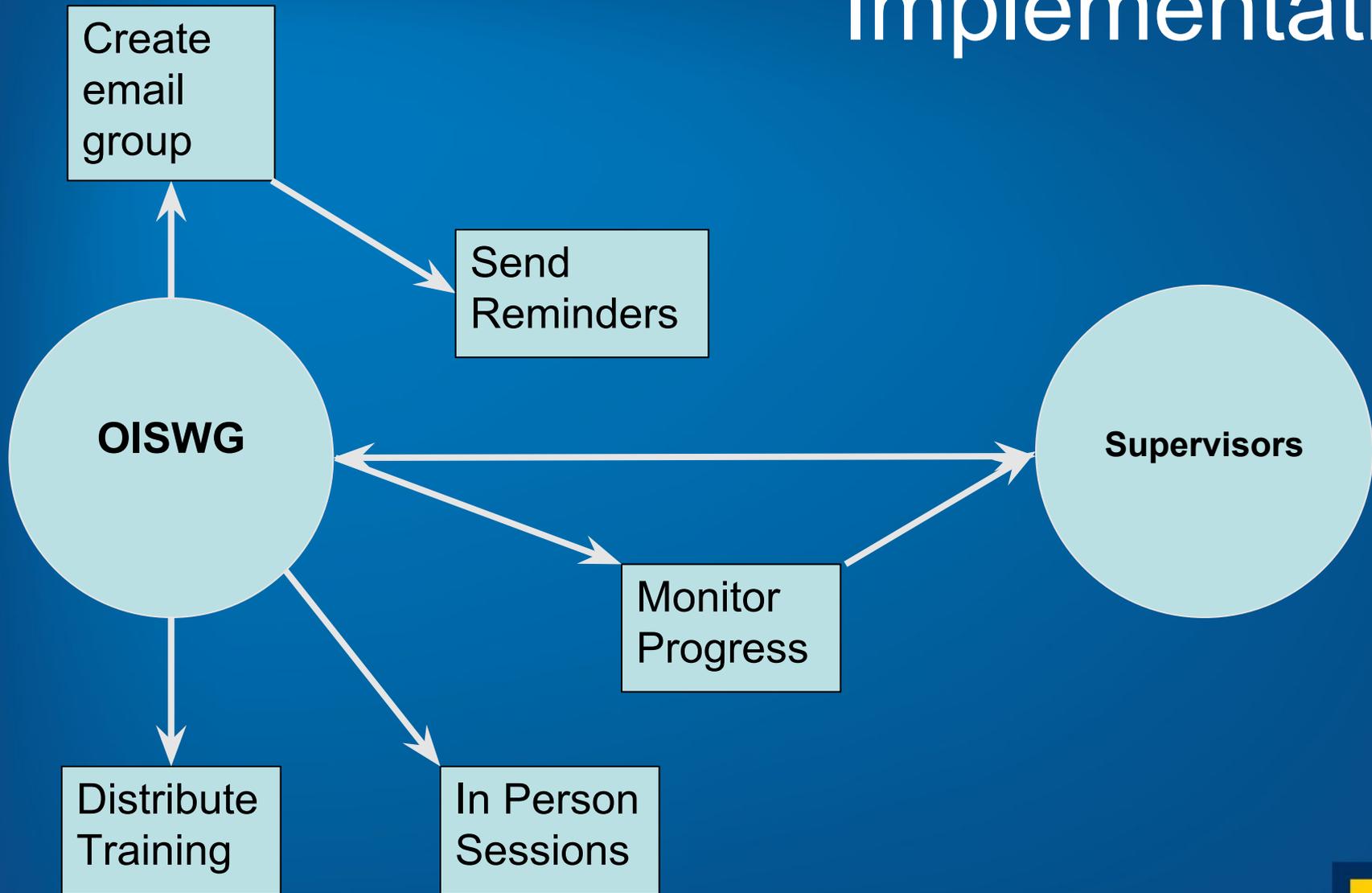
- Turn the screen as best you can so that the patron can see what you are doing.\*
- Repeat the MLibrary address ([lib.umich.edu](http://lib.umich.edu)) to the patron as you pull up the page.
- Point out the 'My Account' link in the upper right-hand corner.
- Inform patron that they will have to log in with their UM credentials (username and KERBEROS password).
- Inform patron briefly about any other features that they may find useful if time allows.

\*Please note that if you are working in Aleph, you should not show the patron the screen as there is sensitive data that must be protected.

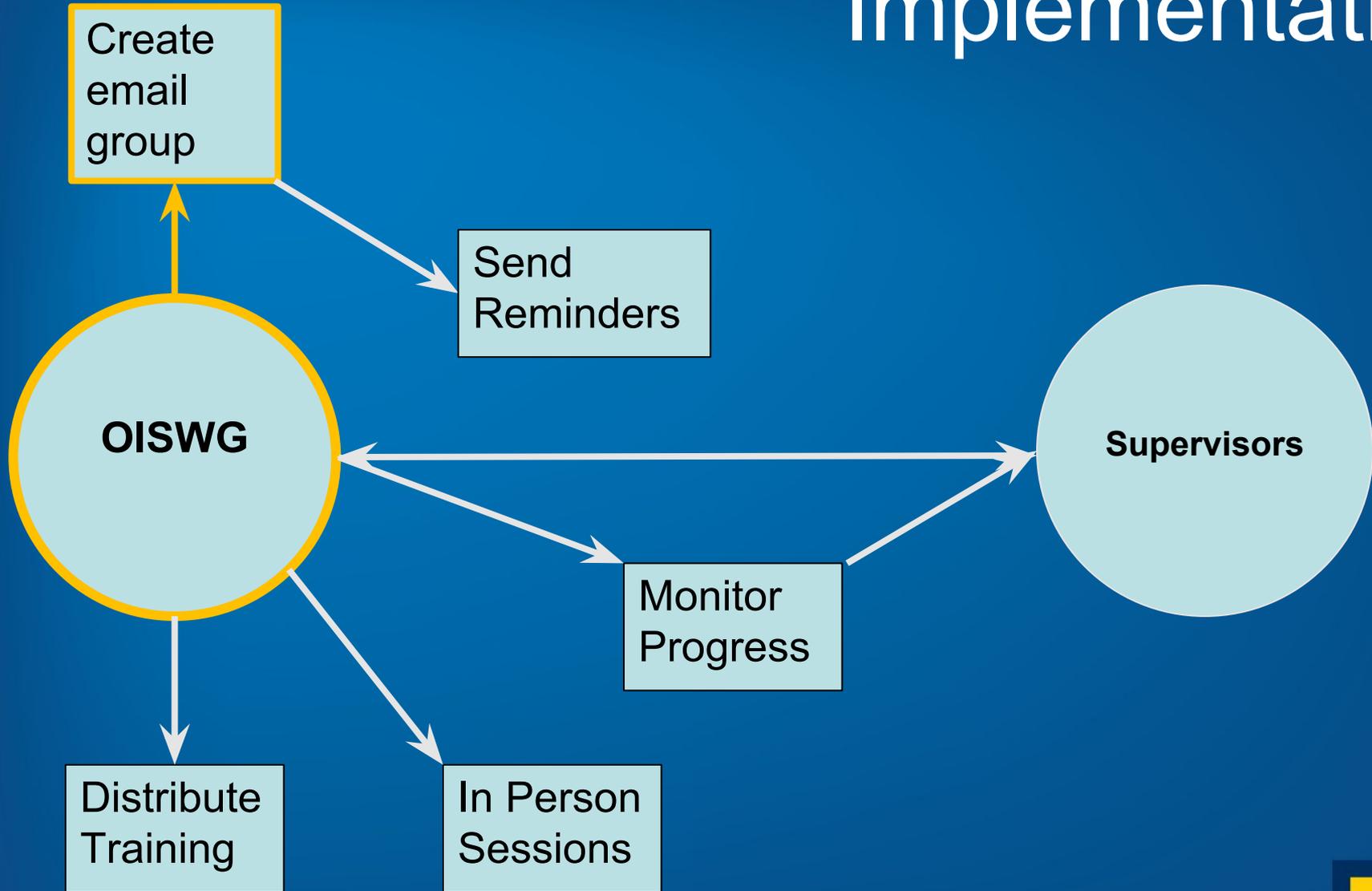


**Remember:** To our patrons, you ARE the library! It is important that you know the library and how to navigate the website. One important component of the UM Library is instruction in information literacy, and you will be contributing to this mission every time you teach a patron to use the library website to find information and resources.

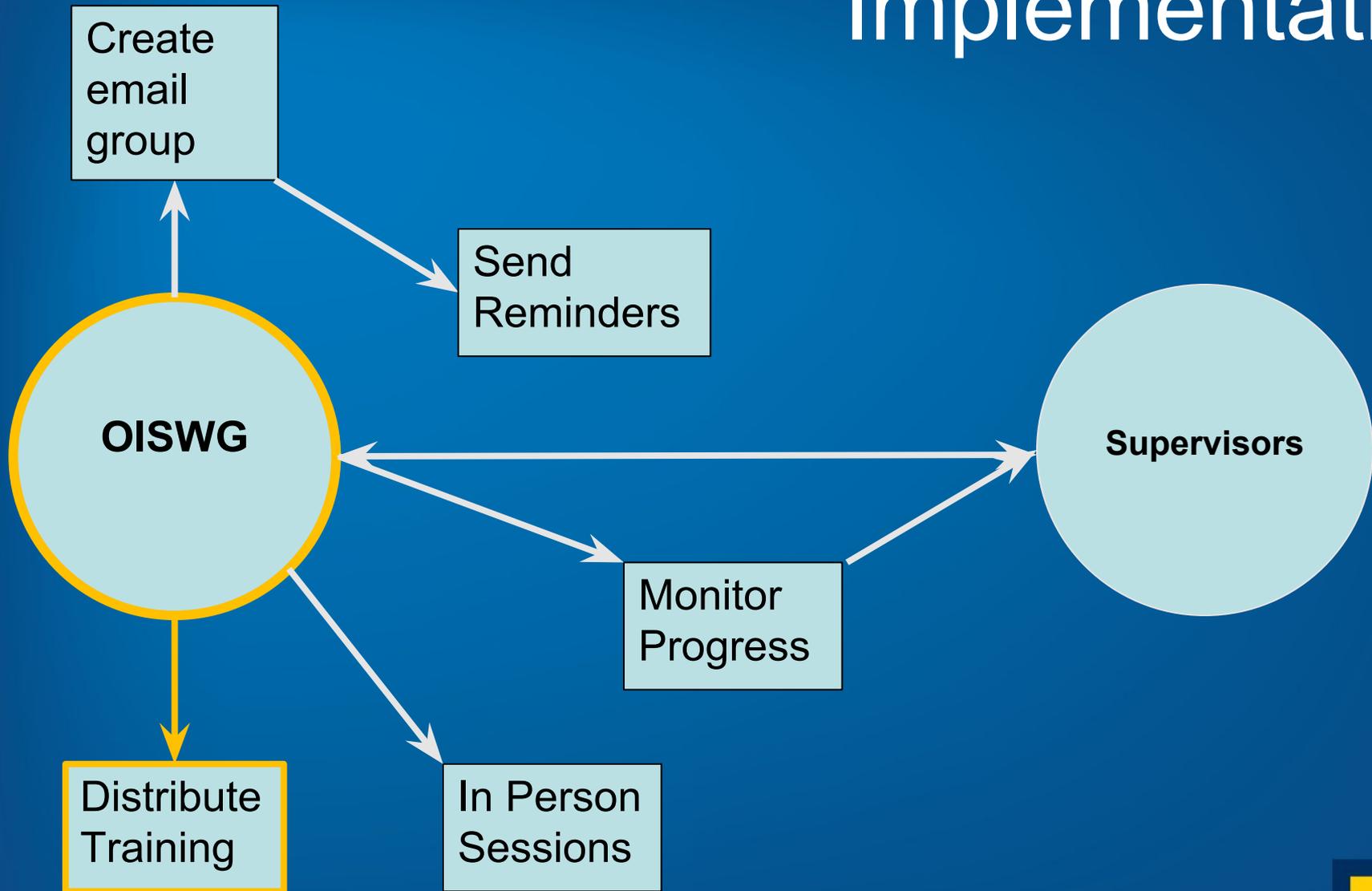
# Implementation



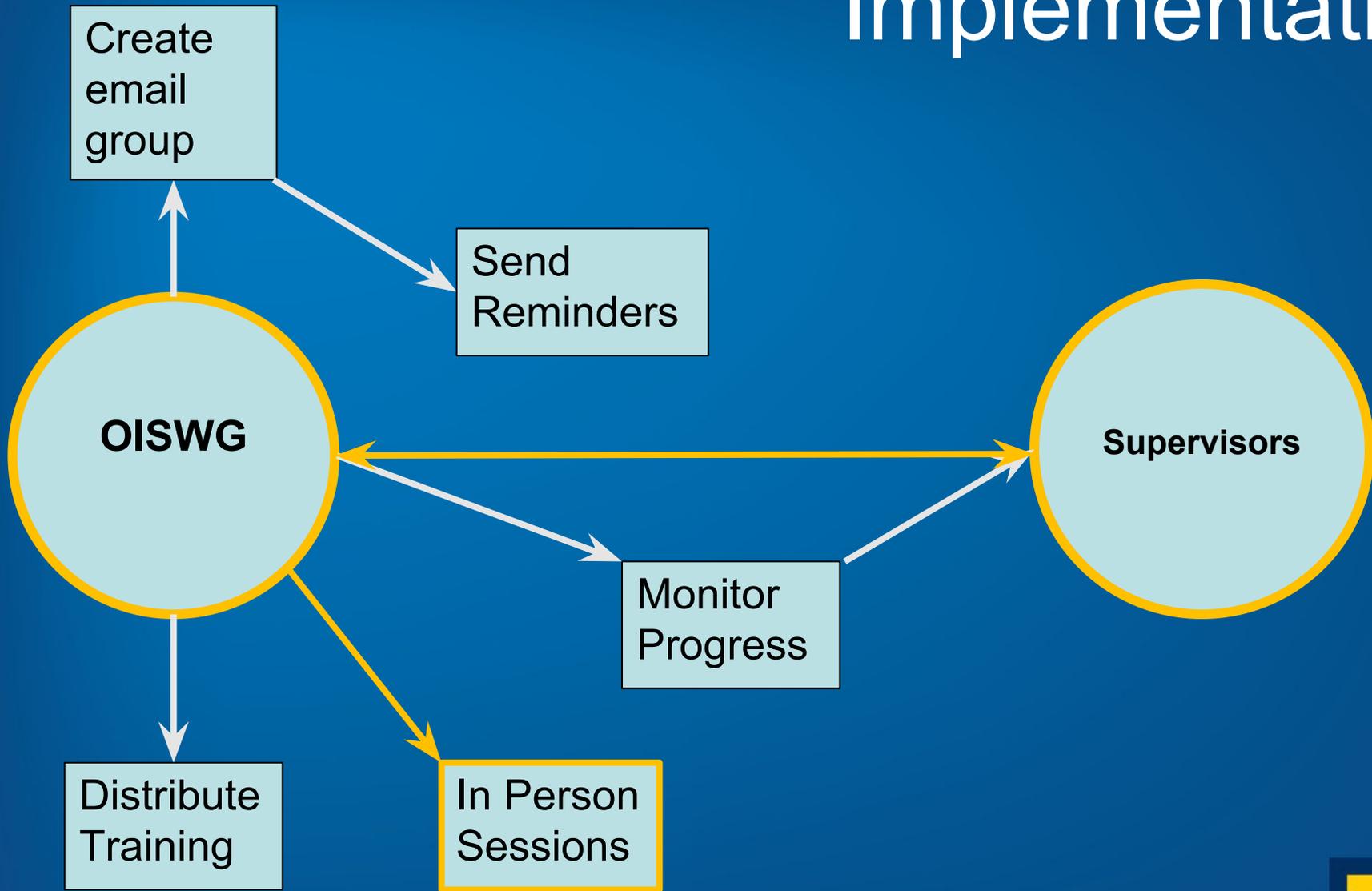
# Implementation



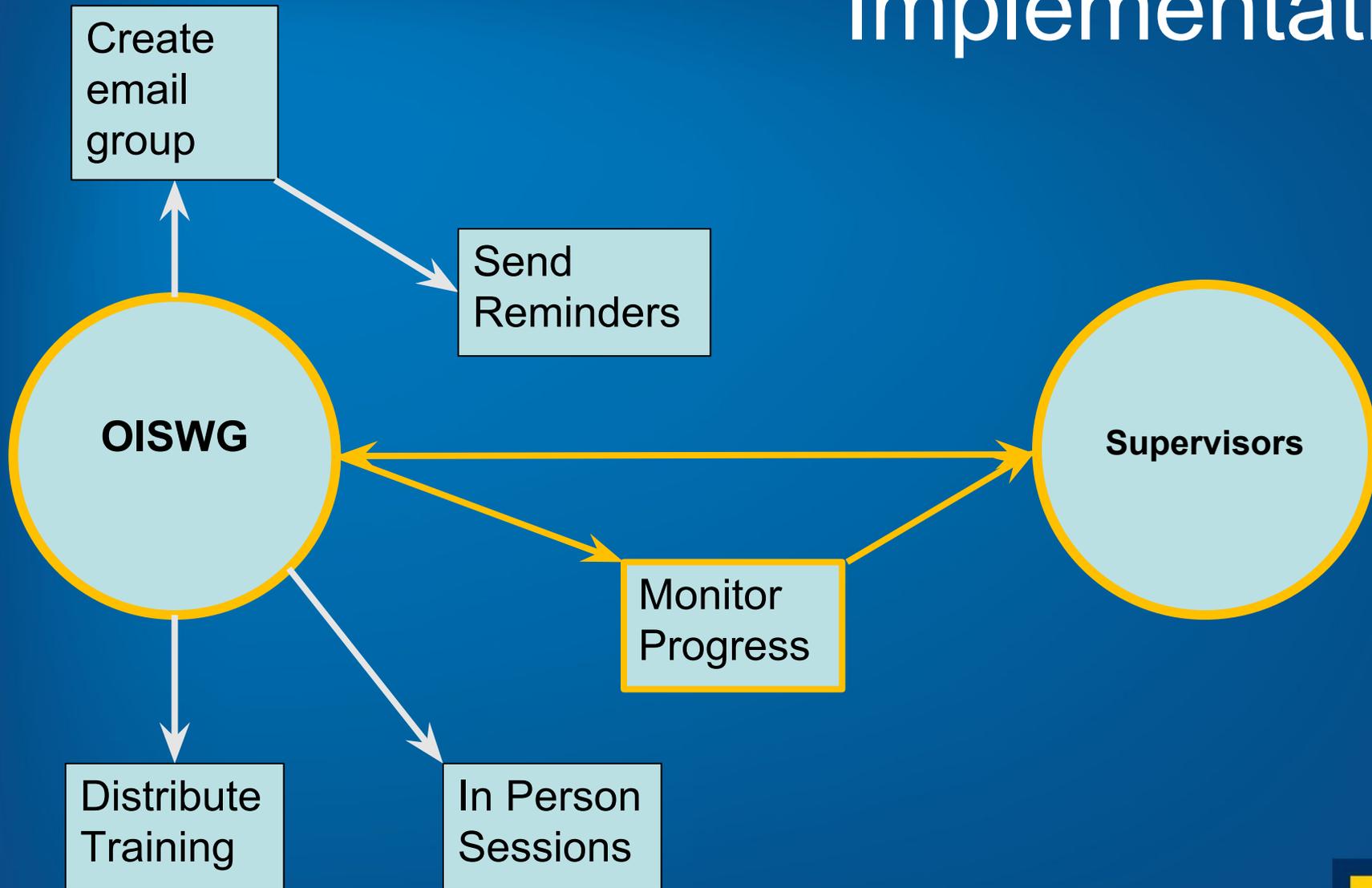
# Implementation



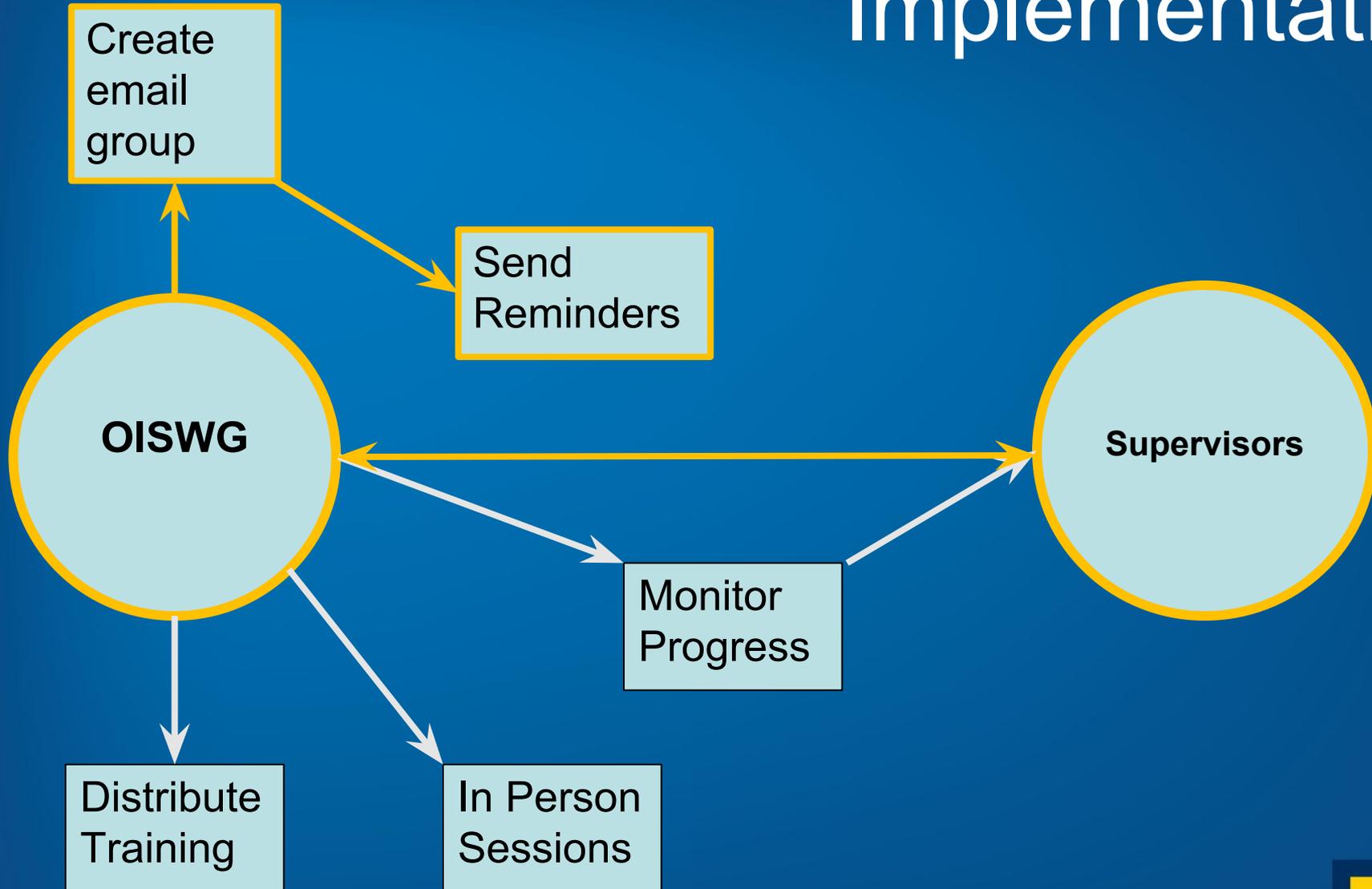
# Implementation



# Implementation



# Implementation



# Time to move on...

Canvas



Created by walle\_chan  
from Noun Project

Qualtrics



Created by Otiliu Stolan  
from Noun Project



Created by NOPIXEL  
from Noun Project

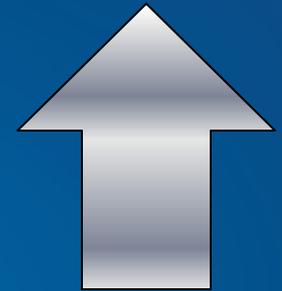


# The Up Side of Qualtrics

Easy to use

Allows for independent work that can be brought back to the group

Keeps a question library so content can be added as needed

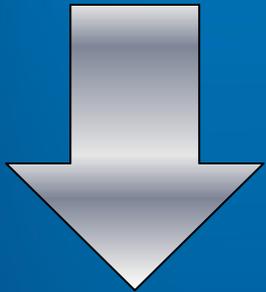


# The Down Side of Qualtrics

Distribution and tracking are clunky

No editing active surveys

Not able to reference materials once completed

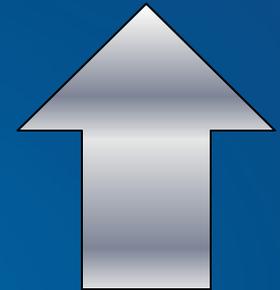


# The Up Side of Qualtrics

Easy to use ✓

Allows for independent work that can be brought back to the group ✓

Keeps a question library so content can be added as needed

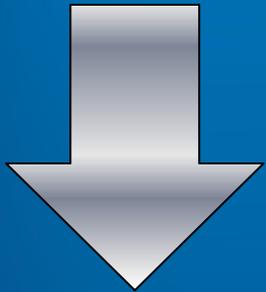


# The Down Side of Qualtrics

✓ Distribution and tracking are clunky

✓ No editing active surveys

✓ Not able to reference materials once completed



# Why Canvas?

- Access for students and staff
- Easy distribution
- Continual access to information
- Other areas of the library have had success using the tool
- Students are familiar with Canvas

# What's next...

Keeping content up to date and relevant

Incorporate more engaging  
activities/multimedia

Training supervisors in using platform

Preservation



Created by Becris  
from Noun Project



# Creating a Training Program

## Prepare



Created by Alexander Ill from Noun Project

Buy-in from your organization

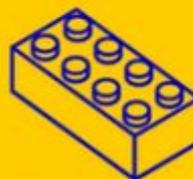
Evaluate needs of service points



Created by Hugo Adams from Noun Project

## Build

Utilize a curriculum design framework



Created by Anthony Davis from Noun Project



Created by Eric Williams from Noun Project

Set learning targets

## The Future

What will others need to continue the program



Created by Gleb Khonuzhly from Noun Project

Don't reinvent the wheel

## Gather Resources



Created by Claver Dale from Noun Project

Review professional guidelines

Leverage your existing resources



Created by Debrah Pearson from Noun Project

## Assess



Created by Creative Staff from the Noun Project

Evaluate the effectiveness of your program for your stakeholders and yourself



Created by Bemice Beltran  
from Noun Project

# Resources: designing information services training programs

American Library Association. (2008). Guidelines for the behavioral performance of reference and information service professionals.

<http://www.ala.org/rusa/resources/guidelines/guidelinesbehavioral>

Cudy, C. & Medeiros, T.S. (2002). Designing a library staff computer training program: implementation of core competencies. *Information Technology and Libraries*. 21(2), 87-90. Retrieved from

<http://proxy.lib.umich.edu/login?url=http://search.proquest.com/docview/215829349?accountid=14667>

Dalston, T.R. & Turner, P. M. (2011). An evaluation of four levels of online training in public libraries. *Public Library Quarterly*, 30(1), 12-33.

<http://dx.doi.org/10.1080/01616846.2011.551041>

Hammill, S. J., & Fojo, E. (2013). Using secret shopping to assess student assistant training. *Reference Services Review*, 41(3), 514 - 531.

<http://dx.doi.org/10.1108/RSR-12-2012-0086>



# Resources Cont'd

Leuzinger, J. (2011). Connect with Your Part-Time Library Staff: Using Learning Styles to Individualize Training. *Texas Library Journal*, 87(3), 78-80. Available from: Library Literature & Information Science Full Text. Accessed October 6, 2016.

Mestre, L. (2012). Chandos learning and teaching series : Designing effective library tutorials : A guide for accommodating multiple learning styles. Oxford, UK: Chandos Publishing. Available from <http://www.ebrary.com>

Todorinova, L. & Torrence, M. (2014). Implementing and assessing library reference training programs. *The Reference Librarian*, 55(1), 37 - 48.  
<http://dx.doi.org/10.1080/02763877.2014.853277>

Wiggins, G. P., & McTighe, J. (2005). *Understanding by design*. Alexandria, VA: Association for Supervision and Curriculum Development.

All icon images provided by the Noun Project: <https://thenounproject.com/> and infographic templates through Canva: <https://www.canva.com/>



# Thank You!

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Discover our training module:



<http://tinyurl.com/h9s2ch6>

