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
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.
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

FAQs
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

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
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

1.2 Campus and Community Information
Session 1 General Library and Campus Information

1.1 Introduction to the Library Website

1.2 Campus and Community Information

*Note: Ask A Librarian*

*Instant Message*

*Ask a Librarian*

Type here to chat, Press ENTER to send

*University of Michigan Website*

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.
Session 2 Library
Information Technology

2.1 Common Technology Issues

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.
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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 they 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.

3.2 Library Catalog

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.
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3.3 Introduction to Library Databases
Types of Questions

**Survey**

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

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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Identify Search Paths

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Types of Questions

Fill In The Blank

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 ___________.

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

Archiving, Archival, Archive, Archives

Quiz Instructions

Discover: Place the following call numbers in order:

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
</table>

True of 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. Z 6940 .K45 v.1
   Z 722 .H68 2014
   Z 6940 .K45 v.2
   Z 6940 .C38 1997
   Z 6814 .S8 M9
   Z 6814 .S9 F23 Suppl.
   Z 6940 .P24 1987
   Z 6940 .C38 2004
   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

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 [ ].

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

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True/False

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   Z 6940 .C381 2004
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   Z 7005 .S861 1992

True/False

True of 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
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

**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

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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 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) 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 ( uniqname 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

OISWG
- Create email group
- Distribute Training
- In Person Sessions
- Send Reminders
- Monitor Progress

Supervisors
Implementation

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OISWG

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Monitor Progress

Supervisors
Time to move on…

Qualtrics

SS Ops Info

Canvas

Created by walle.chan from Noun Project

Created by Olivia Stoian 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
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Easy to use ✓
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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
Creating a Training Program

Prepare
- Buy-in from your organization
- Evaluate needs of service points

Build
- Utilize a curriculum design framework
- Set learning targets

Gather Resources
- Review professional guidelines

Assess
- Leverage your existing resources
- Evaluate the effectiveness of your program for your stakeholders and yourself

The Future
- What will others need to continue the program
- Don't reinvent the wheel
Resources: designing information services training programs


All icon images provided by the Noun Project: [https://thenounproject.com/](https://thenounproject.com/) and infographic templates through Canva: [https://www.canva.com/](https://www.canva.com/)
Thank You!

Shannon Moreno (smmoreno@umich.edu)
Information Resources Assistant Senior

Jasmine Pawlicki (pawlickj@umich.edu)
Onsite User Services/Course Reserves Assistant

Discover our training module:

http://tinyurl.com/h9s2ch6