He Asked Me What!?

Using Shared Online Accounts as Training Tools for Distance Learning Librarians

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On-the-job Reference Training

- Traditional Training Methods
  - Orientations
  - Manuals
  - Professional reading
  - Mentoring/Peer-to-peer
  - Observing

- Learning through observation
  - Reference interview techniques
  - Learning new information resources
  - Looking at a question from a different point-of-view
Replacing Observation in a Virtual Setting

• Distance Learning Librarians may work in isolation
• Conduct reference in a virtual environment
• Observing through shared reference accounts/knowledge bases
  • Online reference interview techniques
  • Reading about information resources colleagues use
  • Learning other approaches to reference assistance
  • Luxury of asynchronous access
Using Shared Accounts for Training

• Survey from August 28-September 5, 2015
• Personal interviews, October, 2015
• Case study
  • ERAU Hunt Library
Survey Instrument - Demographics

- 96.4% employed at an academic library
- FTE varied greatly
- 92% work in libraries that provide virtual reference
- 69% personally provide virtual research services

<table>
<thead>
<tr>
<th>What is your institution's full-time enrollment?</th>
<th>Percentage</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-1000</td>
<td>3.8%</td>
<td>5</td>
</tr>
<tr>
<td>1,001-2,999</td>
<td>18.0%</td>
<td>24</td>
</tr>
<tr>
<td>3,000-9,999</td>
<td>35.3%</td>
<td>47</td>
</tr>
<tr>
<td>10,000-19,999</td>
<td>18.8%</td>
<td>25</td>
</tr>
<tr>
<td>Over 20,000</td>
<td>24.1%</td>
<td>32</td>
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Demographics

- Reference: 57%
- Administration: 15%
- Distance Services: 6%
How does your library provide virtual reference?
25% reported that their libraries have a required formal training program for new librarians in providing virtual reference services.
• Among other choices, participants reported using chat (η=3), Gimlet (η=2) and a homegrown system (η= 3).
Knowledge Base Requirements

• 21% reviewing the knowledge base required training
• 23% required to review the knowledge base daily
• 28% required to view the knowledge base weekly
• 60% find this is effective or very effective for sharing knowledge

• Opinions change based on the participant's role in the library
  • 95% of managers/administrators reported that this was an effective or very effective tool for sharing knowledge.
Qualitative – Survey & Interviews

• Of the 16.6% who selected that a knowledge base is not effective:

  • A majority were concerned about problems with usage (η=10); primarily that usage amongst librarians was low or not uniform

  • Pointed to the need for greater functionality within their knowledge bases. Many of these problems stemmed from accuracy and currency of information.
What Makes a Knowledge Base Effective?

- More uniform usage
- More robust; complete information
- Organization of information
- Authority control
- Having one – it needs to exist!
Interviews

• 5 participants were randomly selected

• *Do reference librarians have positive or negative opinions towards ongoing formal training?*
  • Participants indicated that too many extenuating factors are involved in answering. These factors included: faculty status; group think; time in position; and time or money limitations.

• *Is formalizing sharing of information amongst reference librarians effective for training?*
  • 80% felt that formalizing training could be effective but faces challenges
Interviews

• The group stressed the effectiveness of informal information sharing

• 2 participants felt that a knowledge base could be useful if a system is in place to remind people to view it

• 1 participant suggested that a knowledge base is more useful for technicians or students with limited reference experience

• 1 participant indicated that the knowledge base was too difficult or time-consuming to implement.

• 1 participant felt that a knowledge base could be a useful tool incorporated into ongoing professional training
Case Study – Hunt Library

Reference Training – The Early Years - 1975
Case Study - Training

Reference Training – 1985

- Formalized training
- Auditing class
- Development of a subject-specific training manual
Case Study - Training

Distance Learning - Reference Training – 1997

- Print-based system

- Shared email account -
  - Development of drafts/scripts
  - Authority control system
Organization of Email Knowledge Base

<table>
<thead>
<tr>
<th>Inbox</th>
<th>T_Assignments</th>
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</thead>
<tbody>
<tr>
<td>Research</td>
<td>T_Database Help</td>
</tr>
<tr>
<td>A_Received</td>
<td>T_Full-text items</td>
</tr>
<tr>
<td>B_Completed</td>
<td>T_General</td>
</tr>
<tr>
<td>C_DB_Sent</td>
<td>General: Non-ERAU</td>
</tr>
<tr>
<td>C_WW_Sent 6</td>
<td>Peer-reviewed articles</td>
</tr>
<tr>
<td>LBT</td>
<td>RefWorks</td>
</tr>
<tr>
<td></td>
<td>T_General surveys</td>
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<td></td>
<td>T_General_WW Alerts 101</td>
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<tr>
<td>Ready Ref</td>
<td></td>
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<tr>
<td>Accidents/Safety</td>
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<tr>
<td>Business Economics, Pricing</td>
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<tr>
<td>CFR research</td>
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<tr>
<td>History/Biography</td>
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<td>Maintenance</td>
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<td>Security</td>
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<tr>
<td>Transportation Modes</td>
<td></td>
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<tr>
<td>Research Guides</td>
<td></td>
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<tr>
<td>Staff Notes</td>
<td></td>
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- ASCI 490
- ASCI 670
- ASCI/MSA 602
- ASCI/MSA 691
- ASCI/RSCH 202 (jet, piston, datasets/anova/ASCI 665...)
- DAV/PhD
- FACD 802
- MBAA 517 (accounting)
- MGMT 411 (Singapore)
- MGMT 436 strategic audit
- RSCH 665 (flight delays)
- SFTY 375
- SS 325
- TMGT 661: Literature rev...
- UNIV 101

- T_Historical Drafts 3
- T_Owned_Web
- T_Relais
- T_Voyager
- Thank Yous
- T_Trouble_General
Knowledge Base Training

• Development of a training manual
  3. Introduction to Ask a Librarian email service
     a. Review email correspondence
        i. Email etiquette
        ii. Writing style
     b. Intake form
        i. Ask a Librarian form (yellow sheets)
        ii. Student Action form (pink sheets)
     c. Types of requests
        i. Research requests
        ii. Brief requests
        iii. Citation lists
        iv. Non-EAU requests
  Drafts/LibAnswers
     i. What are the drafts? How did they originate?
     ii. How to use the drafts
         1. Types of drafts and folders
         2. Review for updated information
         3. Customization - personalization
         4. Procedures for editing/maintaining drafts

• Continual training
• Unexpected outcomes
A Librarian’s Point of View

From the librarian’s perspective:

"Maintaining it is a time consuming commitment, but is a huge time saver, especially when answering questions outside of our primary subject expertise”

"It does what a knowledge base should - it prevents us from duplicating work needed to research and write responses to common questions."

"It standardizes our responses to certain questions while allowing for a certain degree of personalization."
Knowledge Base Effectiveness

• Departmental discussions
• Departmental buy-in
• Knowledge base updates

What’s Next?
• Investigate a more robust knowledge base system
Discussion

• Majority of participants indicated training in their libraries
  • Self study/learning – 67%
  • Peer mentoring – 53%
• Managerial librarians more positive about training via a shared online account than reference librarians
  • Time constraints
  • Should be required?
    • Case study experience
Final Thoughts

- Observational training via a shared online resource appeals
- HOWEVER – librarians appear to be left on their own
- Future explorations:
  - Leadership approach to training
  - Revised culture of training
- Our knowledge of resources/interview techniques – best marketing tool for libraries versus internet
  - Training is vital
Questions
Thank you!

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