Empowering the Frontline: A Dynamic Online Reference Manual and Training Session for Student Library Employee Reference Skills

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Background

5 Libraries
- Chemistry & Chemical Engineering
- Earth Sciences &amp; Map
- Mathematics Statistics
- Physics Astronomy

500+ reference questions answered per year

Since librarians are not always available, our division follows a tiered reference model.

Objective

Develop better training and resources for student employees to manage and refer reference questions.

Reference Audit

In designing the training, we conducted an audit of all reference questions asked at our circulation desks during October 2013.

We gathered information on where the question was asked, who answered, and what the question was. Questions were tagged as reference or directional, and then coded by category of question.

We saw that the majority of questions could be answered by student employees with proper training.

Training Design

Goals
- Develop a reference workflow and manual to help student employees respond to reference questions reliably and professionally.
- Provide a training class for reference skills development.

Guidelines
- Focus on commonly-asked questions identified in the reference audit.
- Define the reference roles between student employees and librarians.
- Provide standardized procedures.

Topics covered
- Common subject-specific questions
- Questions requiring subject knowledge

Reference Workflow

Follow the reference manual to respond

- Question Asked
- Common questions
- Internal questions
- Refer to a subject librarian

Reference Manual

Prepared in Google Docs for real-time access and collaborative editing

Codified procedures for consistent training and service

Stepwise directions with sample dialogue

Accessible from any browser or mobile device

Reference Workflow

Follow the reference manual to respond

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Evaluation

Perceived Value of Reference Training

Average scores from 30-day post-training surveys

<table>
<thead>
<tr>
<th>Year</th>
<th>Overall Satisfaction</th>
<th>Perceived Helpfulness</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>4.22 (s = 0.67)</td>
<td>4.13 (s = 0.60)</td>
</tr>
<tr>
<td>2015</td>
<td>3.75 (s = 0.86)</td>
<td>4.25 (s = 0.66)</td>
</tr>
</tbody>
</table>

Top 10 Reference Manual Sections Consulted

Streamline the reference workflow
- An audit of circulation desk reference questions helped us rethink our reference workflow and improve referrals to librarians.

A program to accommodate reference developments
- This approach to documenting and providing training on reference procedures will help the library meet evolving reference demands.

Standardize and codify reference procedures
- This provides consistent service and training across our libraries’ service points.

Positive Feedback

Comments from 2014 and 2015 training session evaluations

A helpful reference manual
- "an asset while working at the library"
- "refreshed my memory on what to do";

Improved reference skills
- "learned how to answer questions that seemed difficult by using the manual"

Lessons Learned

Streamline the reference workflow
- An audit of circulation desk reference questions helped us rethink our reference workflow and improve referrals to librarians.

A program to accommodate reference developments
- This approach to documenting and providing training on reference procedures will help the library meet evolving reference demands.

To develop your training program:
- Audit reference questions.
- Determine which questions could be answered by students.
- Design a reference workflow and document procedures.
- Provide a training session based on case study exercises.