UC Berkeley
LAUC-B and Library Staff Research

Title

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

Permalink

https://escholarship.org/uc/item/24m5v7ps

Authors

Loo, Jeffery L
Quigley, Brian D
Ngo, Lisa T
et al.

Publication Date

2015-07-01

Peer reviewed

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

Berkeley
UNIVERSITY OF CALIFORNIA

Background

Engineering & Physical Sciences Division
of the
UC Berkeley Library

5 libraries
Chemistry & Chemical Engineering
Earth Sciences & Map
Engineering
Mathematics Statistics
Physics-Astronomy

5000+ reference questions answered per year

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

Student employees are the frontline for answering common reference questions and referring intensive ones to librarians.

Objective

Develop better training and resources for student employees to manage and refer reference questions
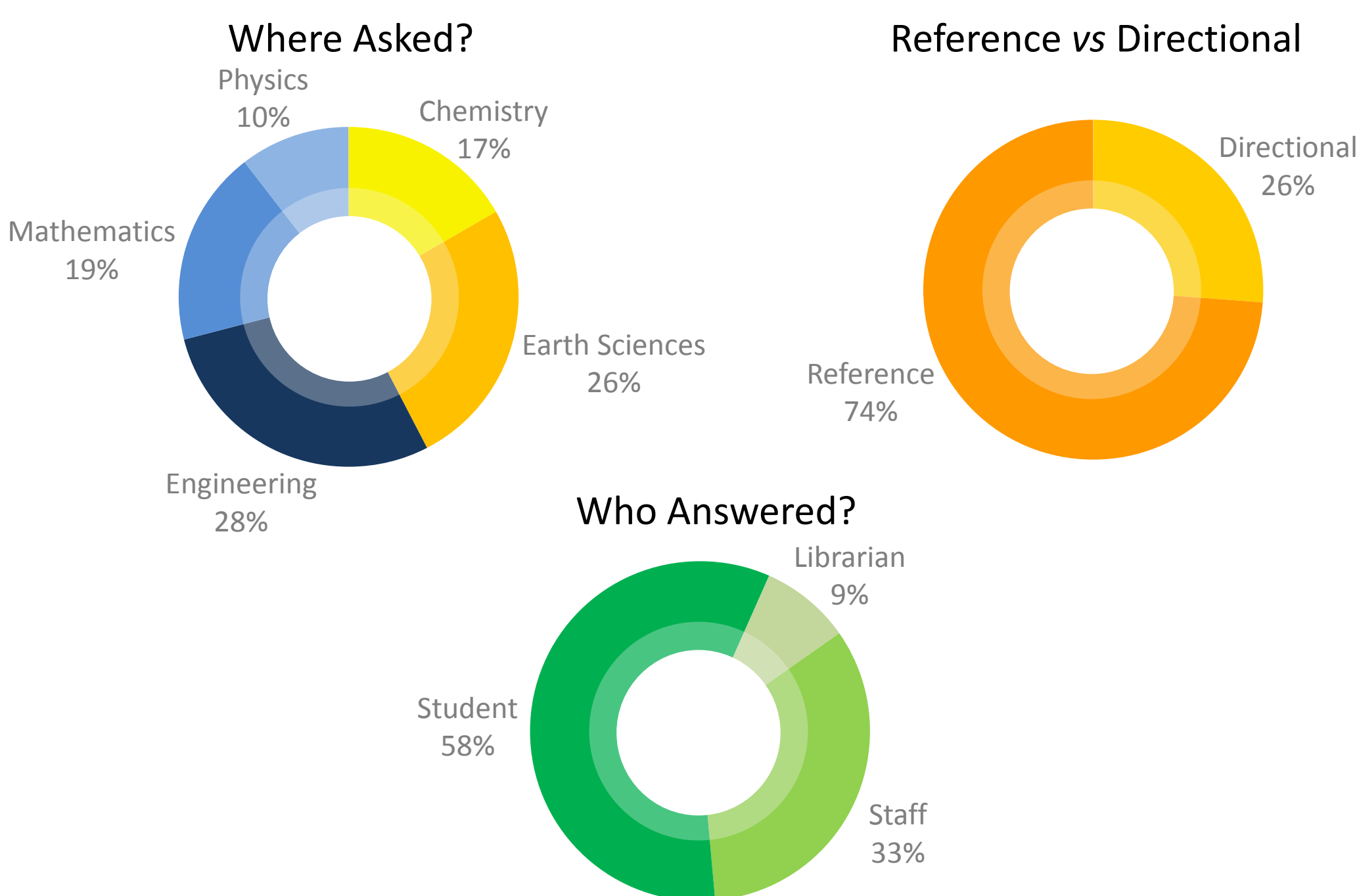
Build upon the training provided by student supervisors to:
- improve the quality and consistency of student employee answers
- increase referrals to librarians
- ensure follow-up with referred patrons
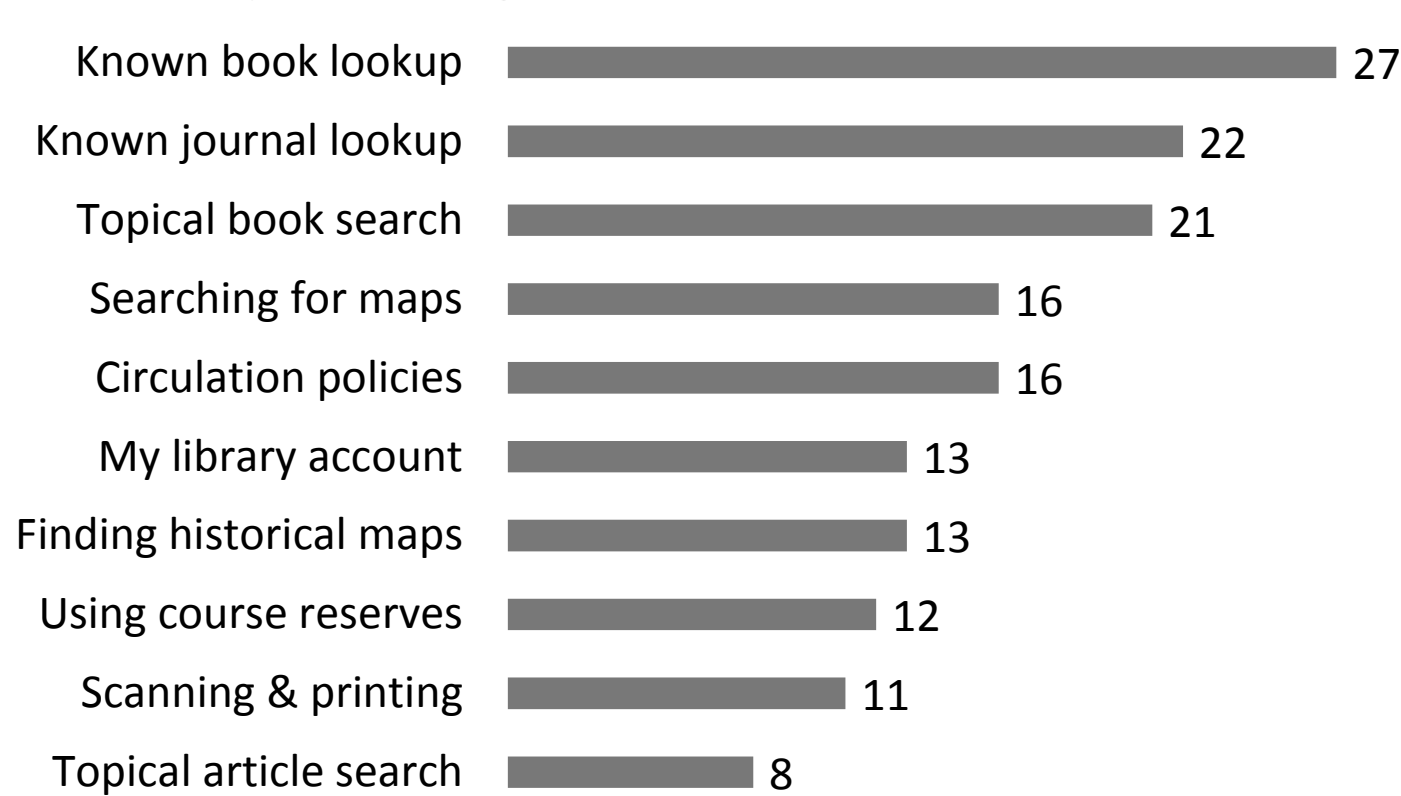- rebalance the ratio of questions answered by students, staff, and librarians

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.

Where Asked?
Physics 10%
Chemistry 17%
Mathematics 19%
Earth Sciences 26%
Engineering 28%

Reference vs Directional
Directional 26%
Reference 74%

Who Answered?
Librarian 9%
Student 58%
Staff 33%

Top 10 Categories of Questions Asked
Category	Count
Known book lookup	27
Known journal lookup	22
Topical book search	21
Searching for maps	16
Circulation policies	16
My library account	13
Finding historical maps	13
Using course reserves	12
Scanning & printing	11
Topical article search	8

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

Jeffery Loo, Brian Quigley, Lisa Ngo, Susan Powell, and Samantha Teplitzky
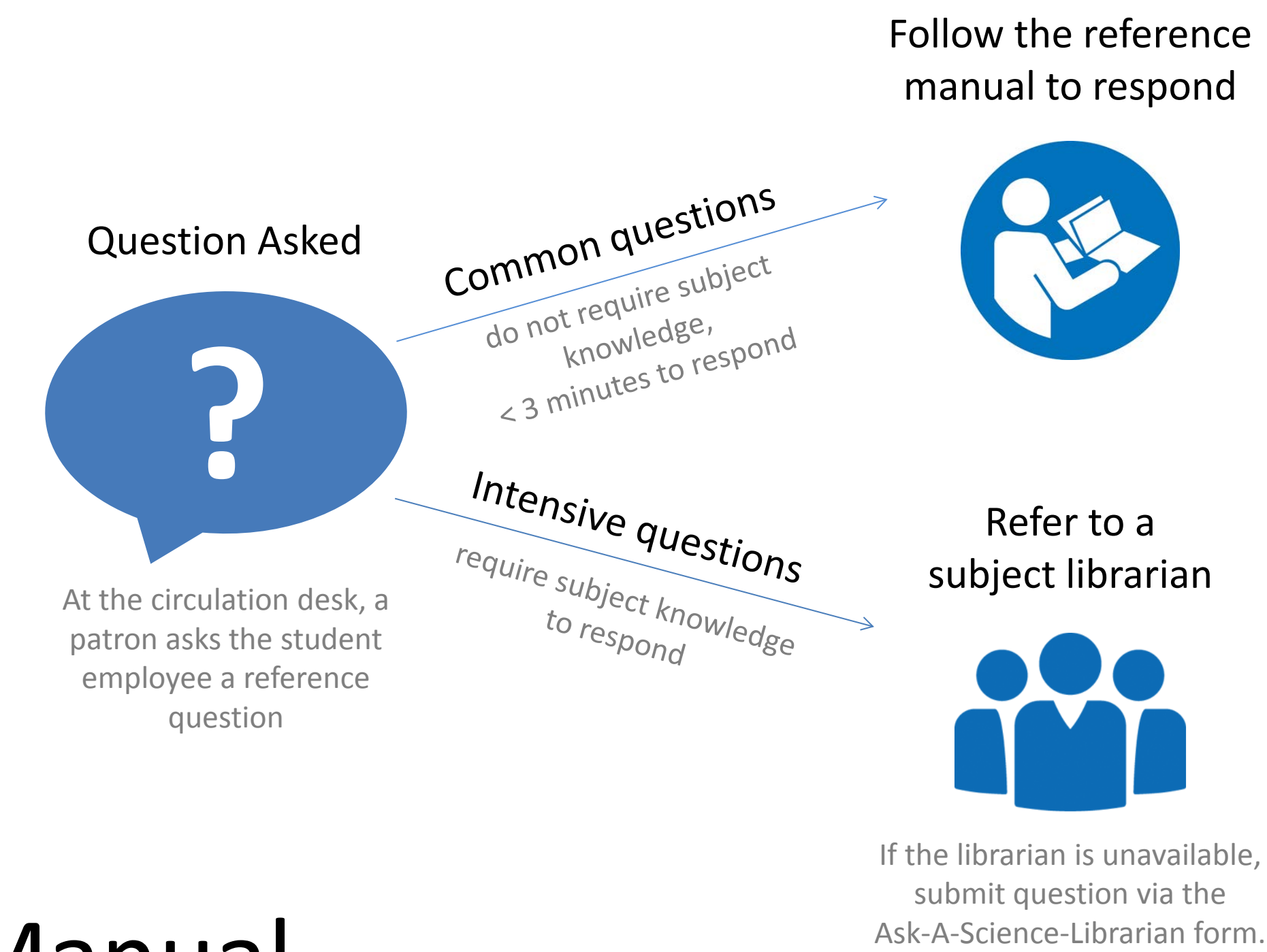Engineering and Physical Sciences Division, UC Berkeley Library

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
Find books and journal articles
Find software programs
Printer/scanner troubleshooting
General library procedures (i.e. renewals, off-campus access, ILL)
Common subject-specific questions
Questions requiring subject knowledge

Reference Manual

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

Q&A format for quick access

Journal articles
I'm looking for this Journal article. Here is the citation.

Search for an online copy.
If unavailable online, search for a print copy.
If you can't find the article, refer to librarian.

PROCEDURES
1. Tell the patron: **Let me check if this journal is online.**
2. Search OskiCat by the journal title, not the article title. (Do not search by journal title abbreviations. Find the full title in All that JAS.)
   a. If you can't find the journal title in OskiCat, double check by searching the E-Journal titles A-Z.
3. If there is an online copy available, email the article's URL to the patron through the email-a-patron form.
4. If there is no online copy, tell the patron: **Unfortunately, there is no online copy. Let's look for a print copy of the journal.**
   a. Check the OskiCat record if the requested journal volume is available in print.
      i. If the journal volume is available at a campus library, tell the patron: **The volume you are looking for is at _____ Library. Here's the call number _____. You could walk over and pick it up. If you would like, we could have the journal sent here for pick-up. This service takes 2-3 days. Would you like to make this delivery order?**

Codified procedures for consistent training and service

Stepwise directions with sample dialogue

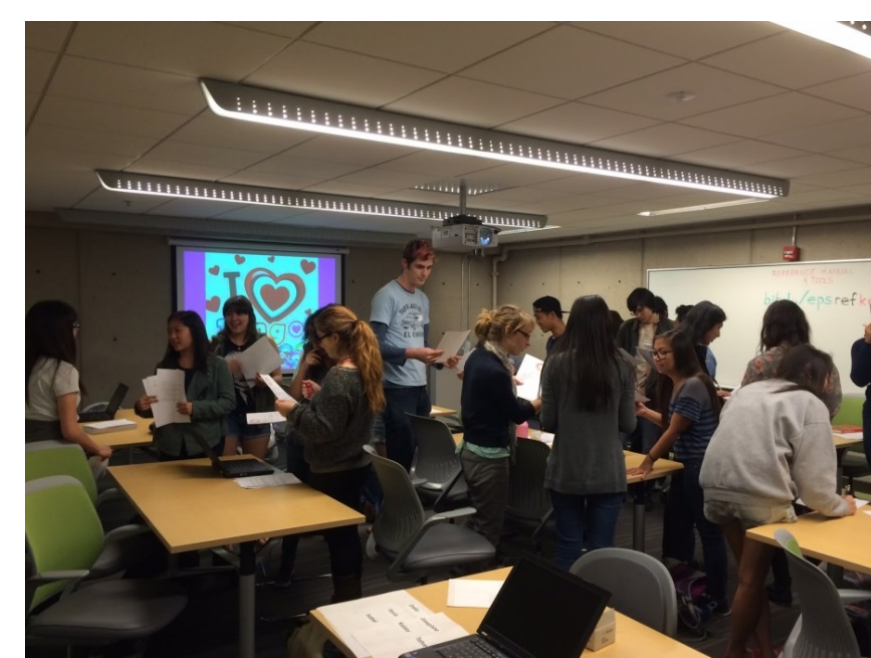Accessible from any browser or mobile device

The commenting feature captures student suggestions and questions. Librarians are automatically notified of needed revisions.

Training Session
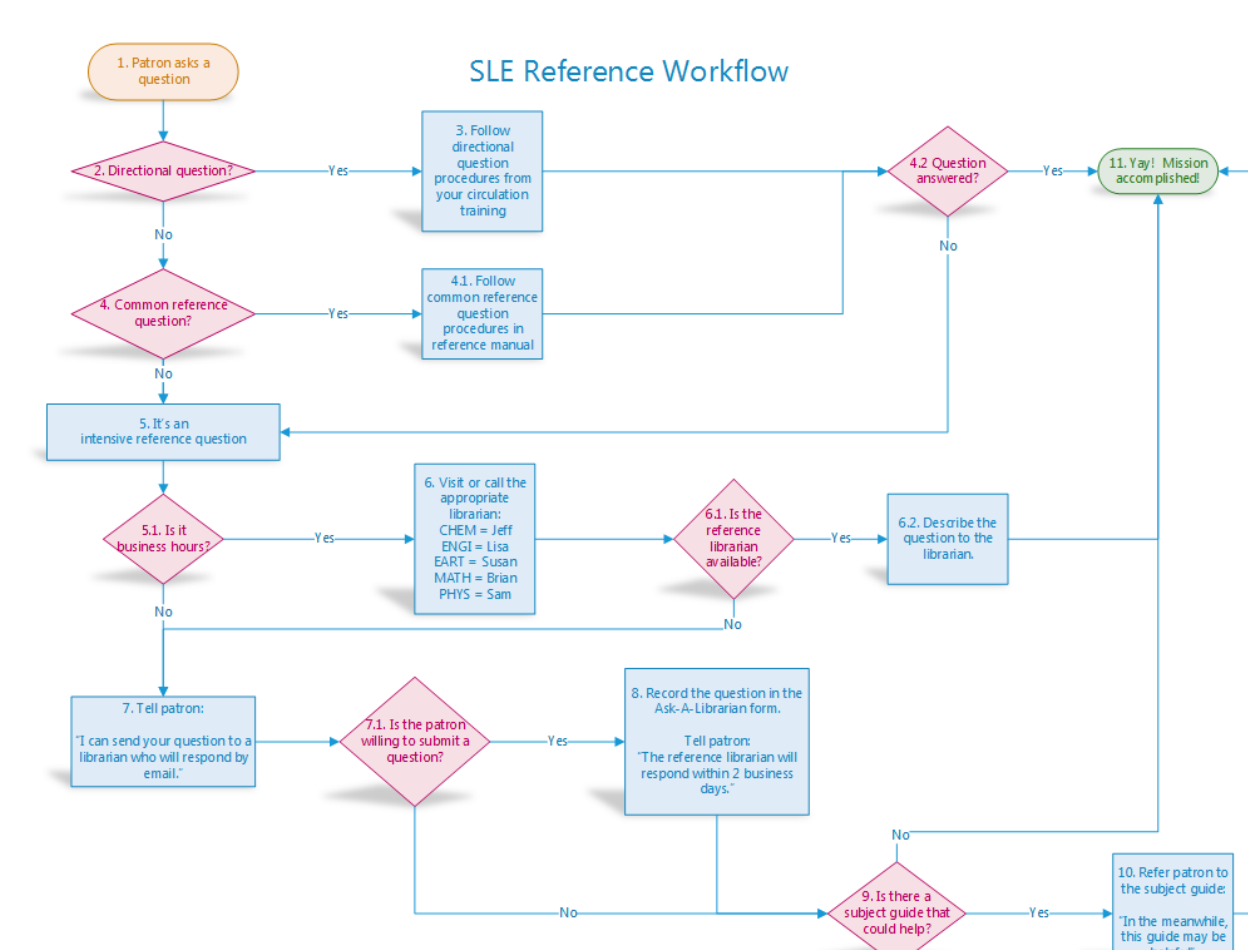
2-hour class

Icebreaker game
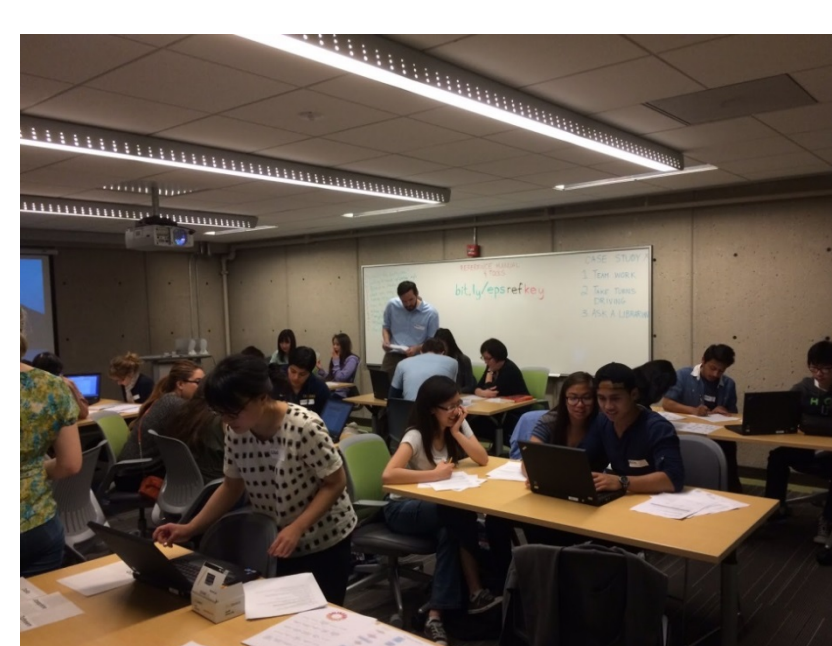Cultivate a reference team spirit!

SLE Reference Workflow

Overview of the reference workflow
Explain student employee roles, the reference workflow, and referral to librarians.

Review of the reference manual
Demonstrate procedures for reference questions.

Case study exercises
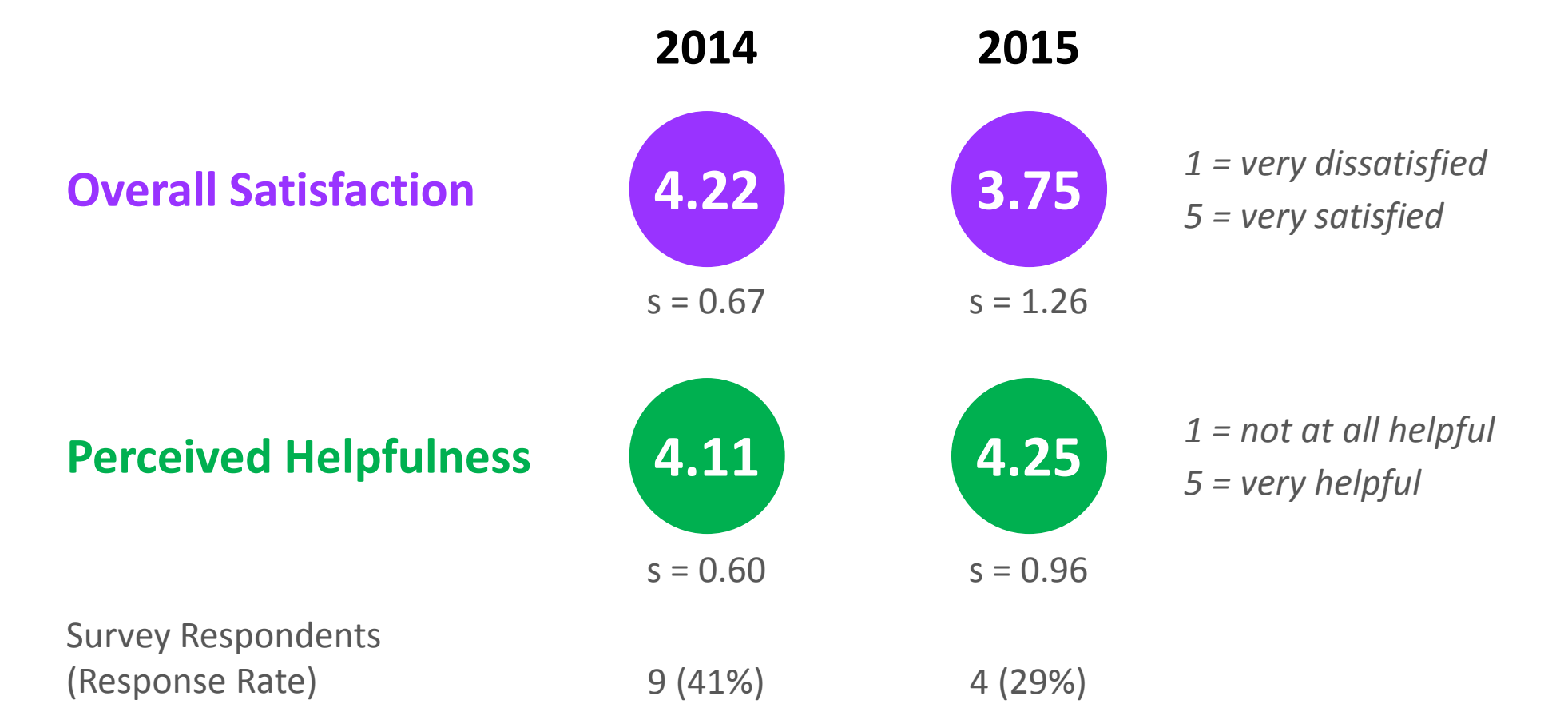Active and problem-based learning with librarian feedback.

Public service tips
Review customer service guidelines. Evaluate library service re-enactments.

Reference Workflow

Follow the reference manual to respond

Question Asked

Common questions do not require subject knowledge, < 3 minutes to respond

Intensive questions require subject knowledge to respond

Refer to a subject librarian

At the circulation desk, a patron asks the student employee a reference question

If the librarian is unavailable, submit question via the Ask-A-Science-Librarian form.

Evaluation

Perceived Value of Reference Training
Average scores from 30-day post-training surveys

	2014	2015	
Overall Satisfaction	4.22 (s = 0.67)	3.75 (s = 1.26)	1 = very dissatisfied, 5 = very satisfied
Perceived Helpfulness	4.11 (s = 0.60)	4.25 (s = 0.96)	1 = not at all helpful, 5 = very helpful
Survey Respondents (Response Rate)	9 (41%)	4 (29%)	

Top 10 Reference Manual Sections Consulted
The number of survey respondents reporting the use of a reference manual section. Cumulative data from 2014 and 2015 surveys.

Section	Count
Find books by title	10
Renew library books	9
Missing book	8
Find journal articles by citation	7
Find journal articles by topic search	5
Find books by topic search	5
Find software programs	5
Off-campus access to online resources	5
Interlibrary borrowing	5
Intensive reference questions	5

Positive Feedback
Comments from 2014 and 2015 training session evaluations

A helpful reference manual
"an asset while working at the library"
"refresh[es] my memory on what to do"

A helpful training session
"case studies were very helpful because of the feedback we received from the librarians"

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

Improved public service skills
"realize[d] some of the mistakes I made regarding public service"
"reminded me of good communication/interaction skills"

Lessons Learned

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

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

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.