Training Library Assistants for New Roles

Jane Fama  
*University of Massachusetts Medical School*

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*University of Massachusetts Medical School*

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October Conference
Biomedical Libraries at Dartmouth College
October 9, 2009

Staff Development
on a Shoestring
Training Library Assistants for New Roles

Jane Fama
Associate Director, Operations

Barbara Ingrassia
Associate Director,
Strategic Initiatives and Work Force Development

The Lamar Soutter Library
University of Massachusetts Medical School
Worcester, MA

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Why a new training program?
Why now?

Respond to:

• Budget cuts
• Changes in technology
• Changing needs of our patrons

Our response:
Develop a cross-training program for Support Staff
Benefits of a formalized program

For the Library:
• Better positioned for our future in a changing information environment
• Flexible resources—knock down the “silos”
• Staff with even more skills

• For Library Assistants:
• Evaluation criteria detail clear and consistent expectations
• Particularly helpful for New Staff
• Part of a Career Ladder Program

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The Training was arranged around these 4 Areas of Responsibility

- **Public Desk** - Circulation, Ready-Reference, Single Service Point
- **Interlibrary Loan** - Borrowing/Lending/Loansome Doc
- **Resource Management** - Acquisitions, Copy-Cataloging, Serials Processing, Stacks Maintenance
- **Technology Support + Initiatives** – Technology Support, Web Page, Technology Initiatives (e.g.: The eScholarship IR)

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Training was divided into:

**Basic Skills Sets**

- Functional Job Skills
- Library Basic Skills
- Team Skills
- Microsoft Office Skills
Training Methods

Combination of:

- **Classes**—
  - Developed and delivered by:
    - **LSL Staff** -- primarily
    - UMMS Human Resources
      - Your Customer is Upset
      - Communication skills
    - UMMS Diversity & Equal Opportunity Office
      - Various policies
    - UMMS Information Systems
    - Consortia Groups
  - **Hands-on**
  - **Independent Study**

Study time was allotted in staff work schedules, as needed.
Evaluation

- Each duty has evaluation criteria
- Ongoing to track progress
- Pass/Fail
- Opportunity for re-evaluation
- Maintain portfolio of their training materials and evidence of progress
Evaluation Methods

- Case Study
- Observation—"Real Time,” “After the Fact”
- Role Playing
- Written Assessment
- Self-Evaluation
- Customer Evaluation

The specific evaluation technique depends on the type of skill being assessed: behavioral, process, or knowledge-based
### Area of Responsibility – Public Desk

<table>
<thead>
<tr>
<th>Achievement Stage</th>
<th>Duties</th>
<th>Evaluation Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Developing</strong></td>
<td>• Can describe differences between databases and when appropriate to use each PubMed, CINAHL (OVID), InfoTrac(Expanded Academic ASAP)</td>
<td>• When given a list of research/clinical questions, will identify most appropriate database to search and perform basic searches with 95% accuracy.</td>
</tr>
<tr>
<td><strong>Accomplished</strong></td>
<td>• Performs Advanced Searches in QUIN, PubMed, OVID, InfoTrac</td>
<td>• Use search strategies and navigation tabs to search complex requests to retrieve information. Observe using features to help focus searches such as Boolean operators, limits, and truncation to present results.</td>
</tr>
<tr>
<td><strong>Mastery</strong></td>
<td>• Stays up-to-date with new resources and vendor enhancements to electronic resources</td>
<td>• Will receive emails from principal vendors (i.e. Thomson, OVID, etc), subscribe to one listserv, read technical updates from NCBI, use RSS feeds and attend in-house training classes as well as local professional meetings. (case study and observation)</td>
</tr>
</tbody>
</table>

*Necessary skills or competencies increase at each achievement stage.*

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Public Desk

Area of Responsibility: Public Desk
Achievement Level: Developing

<table>
<thead>
<tr>
<th>Duty</th>
<th>Evaluation Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customer Service</strong></td>
<td></td>
</tr>
<tr>
<td>• Knows populations served and the</td>
<td>• Correctly classifies patron groups and access privileges 90% of the time (written</td>
</tr>
<tr>
<td>different levels of access to</td>
<td>assessment)</td>
</tr>
<tr>
<td>library services &amp; resources</td>
<td>• When given an access situation, will respond correctly 90% of the time (written</td>
</tr>
<tr>
<td>• Can describe access policies</td>
<td>assessment)</td>
</tr>
<tr>
<td>regarding resources and services</td>
<td>• Given a scenario, can identify and apply the policy to the patron’s need. (role</td>
</tr>
<tr>
<td>available to patrons</td>
<td>play)</td>
</tr>
<tr>
<td>• Can describe library policies</td>
<td>• Will use the LSL prescribed script consistently (observation)</td>
</tr>
<tr>
<td>and procedures to patrons</td>
<td>• Consistently has good interactions with patrons (observation)</td>
</tr>
<tr>
<td>• Uses proper protocol when</td>
<td>• Can correctly identify locations with 100% accuracy. (written assessment)</td>
</tr>
<tr>
<td>answering the phone.</td>
<td>• Can locate class descriptions and registration process for library classes. (observation)</td>
</tr>
<tr>
<td>• Is courteous, listens to patron</td>
<td></td>
</tr>
<tr>
<td>inquiries and is responsive.</td>
<td></td>
</tr>
<tr>
<td>• Knows location of library staff</td>
<td></td>
</tr>
<tr>
<td>and offices for Medicine, GSBS</td>
<td></td>
</tr>
<tr>
<td>and GSON</td>
<td></td>
</tr>
<tr>
<td>• Is familiar with library classes</td>
<td></td>
</tr>
<tr>
<td>offered and can direct patrons</td>
<td></td>
</tr>
<tr>
<td>to website descriptions and registration</td>
<td></td>
</tr>
<tr>
<td>• Will use the LSL prescribed script consistently (observation)</td>
<td></td>
</tr>
<tr>
<td>• Consistently has good interactions with patrons (observation)</td>
<td></td>
</tr>
<tr>
<td>• Can correctly identify locations with 100% accuracy. (written assessment)</td>
<td></td>
</tr>
<tr>
<td>• Can locate class descriptions and registration process for library classes. (observation)</td>
<td></td>
</tr>
<tr>
<td><strong>Circulation Procedures</strong></td>
<td></td>
</tr>
<tr>
<td>• Performs basic functions in</td>
<td>• When given 20 different types of items, can charge, discharge, renew and resolve</td>
</tr>
<tr>
<td>Voyager Circulation Module:</td>
<td>problems with 95% accuracy.</td>
</tr>
<tr>
<td>• charge, discharge, renew</td>
<td>• Can identify form and follow registration guidelines (observation)</td>
</tr>
<tr>
<td>• Can register patrons</td>
<td>• Given patron name, will locate barcode number, edit record, detail items borrowed</td>
</tr>
<tr>
<td>• Can locate patron by name, barcode,</td>
<td>and due date.</td>
</tr>
<tr>
<td>edit record, find what patrons</td>
<td>• When given a task to look for 20 items, can perform the search by author, title,</td>
</tr>
<tr>
<td>have borrowed and when due in</td>
<td>or call number. Can identify the barcode and history of item with 95% accuracy.</td>
</tr>
<tr>
<td>Voyager Patron</td>
<td>• When given a list of 20 items or patron names, be able to determine the status of</td>
</tr>
<tr>
<td>• Perform item search in Voyager</td>
<td>an item and how to proceed with 95% accuracy.</td>
</tr>
<tr>
<td>• Know how to determine if item is</td>
<td></td>
</tr>
<tr>
<td>missing, overdue, or lost</td>
<td></td>
</tr>
<tr>
<td>Patron Questions</td>
<td></td>
</tr>
<tr>
<td>------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>• Can identify the type of question(s) from the patron: informational, directional, ready reference, reference, referral, follow-up</td>
<td>• Given a list of questions, will be able to recognize ready-reference and in-depth questions. (written assessment)</td>
</tr>
<tr>
<td>• Conduct a basic reference interview.</td>
<td>• Be able to ask open ended questions and identify the information needed. (role play)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Locating/Maintenance Physical Library Materials</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Be familiar with basics of the shelving system using LC and NLM classification systems</td>
<td>• Can briefly describe each system and locate handout/file describing them. Earn a certificate from Shelve-it! (Basic skills assessment)</td>
</tr>
<tr>
<td>• Shelve items according to their format</td>
<td>• Shelve 50 items per hour with 98% accuracy. (observation)</td>
</tr>
<tr>
<td>• Identify location &amp; answer basic questions describing physical facilities available to patrons</td>
<td>• Identify the physical areas of the library (written assessment)</td>
</tr>
<tr>
<td>• Be able to direct patrons to and/or locate:</td>
<td>• Given a blank map of the library, will locate all material collections with 100% accuracy.</td>
</tr>
<tr>
<td>1. Reference materials and books that circulate Journals – bound, unbound, current &amp; 8th floor holdings</td>
<td>• When asked, will be able to describe AV material arrangement and shelving organization for consumer health materials.</td>
</tr>
<tr>
<td>2. AV materials (and understand their arrangement)</td>
<td></td>
</tr>
<tr>
<td>3. Consumer health materials and describe shelving organization</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Electronic Resources Website:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Knows how and when to use resources on website: QUIN, Online journals &amp; books, MedlinePlus, GoLocal Massachusetts, eMental Health, Encyclopedias, Newspapers, Dictionaries, Grammar &amp; Writing, Biographical Resources, General Reference Sites</td>
<td>• Can locate and describe each resource listed and appropriate use with 95% accuracy. (written assessment, observation)</td>
</tr>
</tbody>
</table>
### Databases
- Can Identify parts of the citation: author, title, journal, volume, issue number, paging and year
- Perform an author search, subject/keyword search
- Can describe differences between databases and when appropriate to use each PubMed, CINAHL (OVID), InfoTrac(Expanded Academic ASAP)
- When given a list of citations, will be able to identify author, title, journal volume, issue number, paging and year with 95% accuracy. (basic skills assessment)
- Perform basic searches using author names, subject and/or keyword in PubMed, CINAHL, PsycINFO, etc. (written assessment)
- When given a list of research/clinical questions, will identify most appropriate database to search and perform basic searches with 95% accuracy.

### Basic Library Public Equipment Direction and Information
- Is familiar with:
  - Laptops
  - PDAs
  - Copy machines
  - Printers
  - Work stations
- Laptops: identify and insert all external parts, log-on, know how to answer questions regarding wireless service (role play, observation)
- Can troubleshoot equipment, knows appropriate person to call and can document problem. (role play)

### Open/Close Library
- Demonstrates preparing the library for opening and closing: turning on or off computer, locking or unlocking cabinets, keeping statistics of the gate, walking around the library alerting everyone the library will be closing, make sure all patrons are out of the library before locking the door.
- Knows the alarm procedure
- Can perform all activities listed in the Opening/Closing procedures (observation)
- Knows who to call in emergency (both library staff and school). (role play)
- Is able to operate controls on the alarm box (observation)

### Skill Sets
<table>
<thead>
<tr>
<th>Skill</th>
<th>Sets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word</td>
<td>Basic</td>
</tr>
<tr>
<td>Excel</td>
<td>Basic</td>
</tr>
<tr>
<td>Power Point</td>
<td>Basic</td>
</tr>
<tr>
<td>Access</td>
<td></td>
</tr>
<tr>
<td>Internet Explorer</td>
<td>Basic</td>
</tr>
<tr>
<td>Windows</td>
<td>Basic</td>
</tr>
<tr>
<td>Teams</td>
<td>Basic</td>
</tr>
<tr>
<td>Skills</td>
<td>Successfully completes program</td>
</tr>
</tbody>
</table>

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# Library Basics Skill Set

This skill set must be completed by all library staff.

## I  Introduction to UMMS

<table>
<thead>
<tr>
<th>School home page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inside UMassmed + intranet</td>
</tr>
<tr>
<td>Information systems, HELP Desk</td>
</tr>
<tr>
<td>Web CT</td>
</tr>
</tbody>
</table>

**Methods:** Supervisor, Libn-hands-on, PPt

## II  Introduction to the Lamar Soutter Library

| Tour of library departments, collections, Pediatric Library, remote storage |
| Learn about keys, computers, supplies |
| Who’s in charge? |
| Whom do we serve? |
| When are we open? |
| What does each department do? |
| Which library staff to go to? Who does what? |

**Methods:** Supervisor, Library Employee Handbook, FAQ, (new staff intranet tools)

## III  Library Culture

| Introduction to teams, work ethics |
| Tips to provide excellent customer service |
| Our changing environment, what to expect |
| Standards of excellence |
| Career ladder |
| Classes |
| Library jargon |

**Methods:** Formal team training, HR customer service. Video: “Give ‘em the Pickle”, Articles from Director in Staff newsletter, Intro to Levels Plan, notification of appropriate classes, Handout “Library Jargon” and asked staff to review/correct/add

## IV  Library/DEOO/HR Policies

| Basic policies for school employees driven by HR and DEOO |
| Library policies using the online library handbook |
| Library Disaster Plan |

**Methods:** Guest Speakers, Library Employee Handbook, PPt intro and discussion of Disaster Plan in Staff meeting

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## Library Basics Skill Set, continued

### V Introduction to Your Outlook Account

Learn to use your e-mail account, set up distribution lists, and use the school global e-mail address book  
Appropriate use/misuse of e-mail  
Use calendar(s), scheduling, and task functionality  

**Methods:** Demo + Hands-on

### VI Introduction to Voyager ILS

Overview of the system modules used in the Lamar Soutter Library including  
Circulation, Catalog, Acquisitions and how they interact with each other and our patrons.  
Learn basic Quin searching.  

**Methods:** Systems + Cataloging present PPt and Demo + Hands-on

### VII Classification, Citations, and Holding Statements  
*Prerequisite:* Introduction to Voyager ILS

Learn the NLM/LC classification system the library uses to arrange materials by completing the *Shelve-It!* program.  
Learn to shelve items according to their format.  
Learn the parts of a citation, how to detect a bad citation, and how to address it.  
Learn how to read a holdings statement and locate material  

**Methods:** Self-paced online module, PPt, Hands-on

### VIII The LSL Homepage and Staff Intranet

Introduction to the Lamar Soutter Library webpage, which includes online journals and textbooks.  
Introduction to the Library Staff Intranet  

**Methods:** Demo + Hands-on

### IX Introduction to Library Equipment and Policies

Introduction to library computing environment including laptops, printers, fax machines, copy machines, clinical computers, microfilm, scanning and their related policies.  
Troubleshooting, where to get assistance  

**Methods:** PPt, Hand-out, Tour + Demo

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Team Training

• Formal, one-session meeting:
  ◦ Definition of teams
  ◦ Benefits of team work
  ◦ Team structure
  ◦ Roles: Leader, Member, Champion
  ◦ Characteristics of effective teams
  ◦ Evaluating

• How teams function at the LSL
• Become a member of a team
Microsoft Skills: As needed by each AR

- MS Access
- MS Excel
- MS Internet Browser
- MS PowerPoint
- MS Windows
- MS Word
<table>
<thead>
<tr>
<th>Basic</th>
<th>Intermediate</th>
<th>Advanced</th>
<th>Expert</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a New Document</td>
<td>Create an AutoText Entry</td>
<td>Sort a List</td>
<td>Link to an Excel Worksheet</td>
</tr>
<tr>
<td>Print a Document</td>
<td>Find and Replace Text</td>
<td>Restart a List</td>
<td>Link a Chart to Excel Data</td>
</tr>
<tr>
<td>Highlight Text</td>
<td>Apply Font Styles and Effects</td>
<td>Create an Outline Numbered List</td>
<td>Send a Document Outline to PowerPoint</td>
</tr>
<tr>
<td>Change Page Margins</td>
<td>Copy Formats</td>
<td>Customize List Appearance</td>
<td>Extract Text from a Fax</td>
</tr>
<tr>
<td>Save a New Document</td>
<td>Clear Formatting</td>
<td>Sort a Table</td>
<td>Modify User Information</td>
</tr>
<tr>
<td>Navigate in a Document</td>
<td>Find and Replace Text</td>
<td>Modify Table Structure</td>
<td>Create a New Version of a Document</td>
</tr>
<tr>
<td>Insert Text</td>
<td>Set Tabs</td>
<td>Merge or Split Cells</td>
<td>Delete Old Versions</td>
</tr>
<tr>
<td>Move and Copy Text</td>
<td>Change Paragraph</td>
<td>Position Text in a Table Cell</td>
<td>Send a Document for Review</td>
</tr>
<tr>
<td>Change Font and Size</td>
<td>Alignment</td>
<td>Perform Calculations in a Table</td>
<td>Use Comments</td>
</tr>
<tr>
<td>Create Lists</td>
<td>Indent Paragraphs</td>
<td>Create a Chart from a Word Table</td>
<td>Compare Document Changes</td>
</tr>
<tr>
<td>Insert a Clip Art Picture</td>
<td>Add Borders and Shading</td>
<td>Modify a Chart</td>
<td>Merge Document Changes</td>
</tr>
<tr>
<td>Set Page Orientation</td>
<td>Change Spacing Between Paragraphs and Lines</td>
<td>Modify Character Spacing</td>
<td>Review a Document</td>
</tr>
<tr>
<td>Add Headers and Footers</td>
<td>Check Word Count</td>
<td>Add Text Effects</td>
<td>Add Captions</td>
</tr>
<tr>
<td>Insert a Page Break</td>
<td>Modify a Document in Print Preview</td>
<td>Create a Character or Paragraph Style</td>
<td>Mark Text for Indexing</td>
</tr>
<tr>
<td>Create a Table</td>
<td>AutoFormat a Table</td>
<td>Modify an Existing Style</td>
<td>Insert an Index</td>
</tr>
<tr>
<td>Use the Thesaurus</td>
<td>Convert Text to a Table</td>
<td>Create a List Style</td>
<td>Insert a Table of Figures</td>
</tr>
<tr>
<td>Undo Changes</td>
<td>Insert Symbols and Special Characters</td>
<td>Create a Table Style</td>
<td>Mark Text for a Table of Authorities</td>
</tr>
<tr>
<td>Delete Blocks of Text</td>
<td>Add a Watermark</td>
<td>Set Picture Contrast or Brightness</td>
<td>Insert a Table of Authorities</td>
</tr>
<tr>
<td>Preview a Document</td>
<td>Send a Document as an Email Attachment</td>
<td>Create Diagrams</td>
<td>Insert a Table of Contents</td>
</tr>
<tr>
<td>Use Help</td>
<td>Perform a Merge on Existing Documents</td>
<td>Insert Section Breaks</td>
<td>Create a Master Document</td>
</tr>
<tr>
<td>Open a Document</td>
<td>Crop a Picture</td>
<td>Create/Use Columns</td>
<td>Automatically Summarize a Document</td>
</tr>
<tr>
<td>Close a Document</td>
<td>Wrap Text Around a Picture</td>
<td>Link Text Boxes</td>
<td>Update a Document's Properties</td>
</tr>
<tr>
<td>Save As</td>
<td>Draw Shapes and Lines</td>
<td>Run a Macro</td>
<td>Save a Document without Personal Information</td>
</tr>
<tr>
<td>Change Text Color</td>
<td>Insert WordArt</td>
<td>Customize Toolbars and Buttons</td>
<td>Hide Text</td>
</tr>
<tr>
<td>Page Numbering</td>
<td>Insert Text Boxes</td>
<td>Add Menu Items</td>
<td>Limit Formatting Choices in a Document</td>
</tr>
<tr>
<td>Check Spelling and Grammar</td>
<td>Insert Endnote/Footnote</td>
<td>Create a Document Based on a Select Regions of a Document</td>
<td></td>
</tr>
</tbody>
</table>

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Microsoft Word: Basic Skills Test

(INSTRUCTIONS HANDED TO PARTICIPANT before the test)

Name: _________________________

You will have 45 minutes to complete the proficiency test. The purpose of the test is to evaluate your skill level in Microsoft Word. There are two parts to the test. Part 1 is to create an electronic file following the instructions below. Part 2 is to respond to some short answer questions.

Part 1

Instructions: Using the electronic file, WordBasicStart.doc, edit the document to look like the two page handout you have received as part of this test. Some of the text you will need is in your starting document. Remember, you are creating one file with two pages. Save the file as your name Word.doc, e.g., Cathy Word.doc. Print the document, IN COLOR, to be handed in with Part 2.

Tips
* Watch for text that you can move or reformat instead of retyping. * You may have to delete text.
* Select your font size and type as you think appropriate. * Use a one inch margin.
* Don’t forget the footer. * Don’t forget the page numbers.
* Select any image you like for the flyer on page two of your document.

Part 2

A. Using Microsoft HELP, name two sources for importing a picture.
B. Using the thesaurus function, name two synonyms for book.
C. Name one benefit of “Previewing” a document.
D. What does the Save As function do?

Here is the content of the STARTING DOCUMENT FOUND AT WordBasicStart.doc

However, given that the data was 7 months old and that many libraries were considering products, the team concluded that a survey to the entire AAHSL discussion list would be useful and appropriate for answering the remaining two questions in our charge. The Management Team recommended that the team limit the survey to the libraries identified in the AAHSL preliminary survey results as already having access to a federated searching product. That survey showed 41 libraries using federated searching, but one library responded to say there had been an error and they did not use it, leaving 40 libraries surveyed. The link to the survey was emailed on March 21, 2007, with a follow-up sent on April 3, 2007. The survey generated 17 responses, for a 42% return rate. These preliminary survey results helped answer two of the questions in the team’s charge:
• 41 of 125 (33%) libraries currently have a federated searching product.
• 2 of 125 (1%) are planning to discontinue their current product.
• 11 of 125 (8%) are planning to add a federated searching product.
• Metalib is the most popular product with 25 installs.
• Percentages for libraries considering and not considering federated searching cannot be computed because libraries selected multiple products.

These preliminary survey results helped answer two of the questions in the team’s charge:

• Which of the AAHSL libraries are using a federated searching tool?
• Which federated searching tools are medical libraries using?

However, given that the data was 7 months old and that many libraries were considering products, the team concluded that a survey to the entire AAHSL discussion list would be useful and appropriate for answering the remaining two questions in our charge.
The Library will close today at 5:00 pm for the Thanksgiving Holiday

We will reopen on Monday at 7:30 am
Training Methods

Combination of:

- **Classes**— *(Functional skills, BLS, Team, MS)*
  - Developed and delivered by:
    - **LSL Staff** -- primarily
    - UMMS Human Resources
      - Your Customer is Upset
      - Communication skills
    - UMMS Diversity & Equal Opportunity Office
      - Various policies
    - UMMS Information Systems
    - Consortia Groups
- **Hands-on**— *(Functional skills, Team, MS)*
- **Independent Study**— *(Functional skills, BLS, MS)*

Study time was allotted in staff work schedules, as needed.
Training for the Single Service Desk
Addressing Concerns

How can support staff do what we do?

- Librarians felt service would suffer.

How can we learn everything that the librarians know?

- Support Staff felt that they were not knowledgeable enough.
Get as many librarians as possible involved in the training.
Training Plan

- Classes
- Shadowing and Reverse Shadowing
- Hands-on
- Ongoing Training
Classes

• Basic Training
  – Reference Interview
  – Web Resources
  – Pubmed and CINAHL Searching

• Advanced Training
  – Going the Extra Mile
  – Web Resources Part II
  – Reference Interview Part II

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Class Objectives

- Staff will be able to conduct a reference interview
- Staff will be able to locate major resources on the LSL web site
- Staff can determine what resources may be appropriate for students vs. public
- Staff will be able to search the two major databases.

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Reference Interview

Goal: Intro to Ref Services and Resources

1. Mechanics vs. Art
2. Audience
3. Reference Interview
   - Approachability
   - Interest
   - Listening/Inquiring
   - Searching
   - Follow-up
4. Tips for successful encounter
5. Role Play
Reference Interview II

Make it Concrete!!

1. Phrase to hang on to
   Think “Triage” ….. Think WORF!

2. Examples

3. Trigger Words

4. Sample “Scripts”

5. HANDOUTS

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Think "triage" ...think WORF!

Welcoming, open attitude and body language invite communication.
Make eye-contact, be approachable, listen and concentrate, and be patient.

Open-ended questions give the patron a chance to express their needs in their own words. Ask questions that cannot be answered with yes or no to encourage the patron to talk. [Otherwise you are just guesssssing!]

* Would you explain that to me in more detail, please?
* Is there something specific about it that you’re looking for?

Rephrase (not repeat) the user’s query to clarify and confirm. The patron, reassured you’re listening, may then provide more information.

* You need material from books not the internet.
* You need the articles in pdf format to copy figures to a PowerPoint.

Clarifying questions help refine the information needs –
* Will you please tell me where you have searched so I don’t duplicate?
* How recent does the information need to be? What is your deadline?
* Should these books be on a clinical professional level or layman?

Verify the question when you feel you have it nailed down --
* So, you need 4 articles on depression for your paper due tomorrow.
* What you need is a recipe for tomato sauce to serve 400, correct?

Follow-up to insure the user is satisfied. The only way to be sure is to ask!

* Does this completely answer your question?
* Is there anything else I can help you with?”
* If you’re not finding what you need, please come back to the desk.
* I need to work on this question a while longer. May I call you or send an email by this afternoon?

When searching, good practice is to turn the monitor around and explain what you’re doing (e.g., I’m searching the catalog, I’m going to this website…)
If you are unable to find the answer with sources available, consider referral.
Trigger words

Red flag that these questions may need to be referred:

I’m doing a grand rounds presentation (indicates extensive research)
  I need to do a Systematic Review
  I need to perform a Meta-analysis
  I’m writing a grant
I’m doing an extensive literature search for a dissertation
  I need Evidence-based articles, evidence-based nursing resources
  I have a patient who….
  I need help formatting citations in specific styles for journals.
  Working with complex health statistics; using/interpreting GIS data
  I have a family member in ICU… I need information on… (privacy?)
  I need meeting abstracts from a conference

Some individual referral contacts:

| Copyright issues beyond pointing out how to access the Annual Copyright License (ACL) tool | Barbara |
| Requests to have SciFinder installed on lab computer | Mary/Sally |
| Any catalog question (QUIN, WorldCat, etc) or if a record is unclear; e.g., the ‘in transit’ notation… | Lisa/Cecile |
| Having trouble with an e-journal article; can’t get into a database on or off-campus; library website issues, etc. | Bob |
| Gifts to the library (policy) and materials requests | Janet (and links from the website) |

Hand-off phrase suggestions:

“If you have a moment, I’d like to call one of the librarians to come out and work with you….”

“I’d rather not begin work on your question at this desk, as it could take quite a bit of time. If you have time to stay, I’d be happy to ask one of the librarians to come out….”

“If you wouldn’t mind waiting a few minutes, I’ll call a librarian to discuss your question with you at one of the computers…”
### LSL Quiz Show

<table>
<thead>
<tr>
<th>Where in the world is Carmen J. Portillo?</th>
<th>CODE BLUE – INFO STAT!!</th>
<th>Take Two and Call Me in the Morning</th>
<th>He Said, She Said</th>
<th>UNCLE!! (I Give Up)</th>
<th>“Foreign” Languages</th>
</tr>
</thead>
<tbody>
<tr>
<td>This bit of info tells you the journal comes in print.</td>
<td>Perhaps our most popular clinical resource (and it’s not available off-site).</td>
<td>$100</td>
<td>$100</td>
<td>$100</td>
<td>$100</td>
</tr>
<tr>
<td>Use this feature to search QUIN for sound recordings.</td>
<td>It tells dosing information for Diazepam (plus 1000s of other drugs).</td>
<td>$200</td>
<td>$200</td>
<td>$200</td>
<td>$200</td>
</tr>
<tr>
<td>The QUIN feature that allows a patron to renew books.</td>
<td>A collection of “quick” online books.</td>
<td>$300</td>
<td>$300</td>
<td>$300</td>
<td>$300</td>
</tr>
<tr>
<td>Use this link from the QUIN record to get to an online journal.</td>
<td></td>
<td>$400</td>
<td>$400</td>
<td>$400</td>
<td>$400</td>
</tr>
<tr>
<td>A quick place to find an item’s status.</td>
<td></td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
</tr>
</tbody>
</table>
“One-A-Day” Database Vitamins
Use the featured resource as an easy reminder / tool to learn one new database each day.
Searching Pubmed and CINAHL

1. Make your Objectives Clear

This training session will provide attendees with the following skills:
   - Locating the resource
   - Basic navigation
   - Searching
   - Understanding your results

2. HANDOUTS with screenshots

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**Single Citation Matcher** - to search for an article by its identifying information (such as author, journal title, article title, etc.), use this great tool!

- Use this tool to find PubMed citations. You may omit any field.
- Journal may be the full title or the title abbreviation.
- For first and last author searching, use smith jc format.

This is where you input the identifying information to find the article.
CINAHL (Cumulative Index to Nursing & Allied Health Literature)

This training session will provide attendees with the following skills:

• Locating the Resource
• Basic Navigation
• Searching
  • Keyword
  • Search Strategies
    ○ And/Or
    ○ Truncation
  • Refine Search
  • Basic Publications Search
  • Basic Author Search
  • Search History/Alerts
• Understanding Your Results
  • Result List
  • Citation
    ○ Anatomy of a Citation Record

“I've never seen or used CINAHL before. Where do I begin?”

• From the LSL homepage, click the blue link along the left side of the screen that says CINAHL.
Shadowing

- One hour per week for 3 months.

- Staff began to realize that librarians don’t know everything.

- Hopefully that transfers to: “Maybe I DON’T need to know everything!”
Hands-On

- Five reference questions/wk for 12 weeks

- Advantages
  - Actually had to look for resources and use them
  - Doing helps you retain knowledge

- Assumptions
  - We gave Staff “off duty” time to work on assignments

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Sample Questions

1. Where would you direct a patron who wants to see what our online resources are (journals, books, databases, internet links, etc.) in the area of Geriatrics?

2. Does the library subscribe to the Community of Science (COS) Funding Opportunities database?  
   [Once you find the database, try a search to see how the results are displayed and what information is provided. Just for fun, try the Search Wizard to the right of the search box. See if you can find some funding that would support your research on diabetes.]

3. What are five resources you could suggest to a patient or family member to find information about heart attacks?

4. Do we have online access to the ICD-9 CM? If so, is it a current edition? Do we have it in print? What does ICD-9 CM mean?

5. Where would you find some basic history about the Worcester Foundation for Biomedical Research and the types of materials the Foundation has donated to the UMMS Archives?
Ongoing Training

Library Grand Rounds

National Library of Congress

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In Conclusion

- Cross-Training has been Successful
  - Staffing resources flexible
  - One staff promotion the first year
- Successful implementation of Single Service Desk
- Triage is working
Next Steps

- Evaluation of the training program
- Evaluation of the single service point
- Reviewing and revising program elements
Information concerning the Career Ladder Program mentioned on slide # 4 may be found in:

We welcome your comments, questions, and suggestions!

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- The Lamar Soutter Library
- University of Massachusetts Medical School
  [http://library.umassmed.edu](http://library.umassmed.edu)
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