Teaching library and information retrieval skills to academic administrators and support staff

By the EBSS Bibliographic Instruction for Educators Committee

Barbara Celone, Chair

Addressing unique user needs within a traditional BI context.

In November 1984 C&RL News, pp. 546-48, published a document entitled, “BI Tip Sheet for Academic Administrators and Support Staff,” which was produced by this committee. The document enumerated points one needs to consider in planning an orientation/instruction session for secretaries, clerks, administrative assistants, counselors, alumni directors, registrars, admissions officers, development officers, and the like. Response to the document was very positive, and many librarians indicated the need for a second document to outline what to include in such sessions and how to teach them.

For the past few years the committee has been undertaking that endeavor. We trust it will be useful not only to those librarians planning to introduce such a component into their bibliographic instruction programs, but also to those who are refining the programs they have already begun.

Segments of the academic community other than faculty and students demonstrate very different library use patterns than their research-oriented counterparts. Academic administrators and support staff are rarely regular users, and what they need from the library is often a specific piece of information or a specific known item. They are the epitome of pragmatism—needing information that exactly and succinctly answers their question, and needing it quickly. Often they are sent to the library for someone else, and therefore are often not even sure what it is that they are seeking or how to begin. Librarians should be prepared to repeat bibliographic instruction programs for this group on a regular basis, because turnover among them is so high. In fact, much of the content of these programs is necessarily as much consciousness-raising and public relations as it is information-seeking skills. This document attempts to convey the ways in which these unique needs can be addressed within a traditional bibliographic instruction context.

The document is conceived as a carefully selected smorgasbord of ideas. While not prescriptive, it does represent the committee’s consensus on preferred content and practices based on personal experience and the experience of those authors listed in our bibliography. It has four sections: 1) Instructional Strategies; 2) Library Departments and Services; 3) Access to and Retrieval of Information, and 4) Reference Tools. Each of the sections begins with a conceptual statement reflecting the thoughts committee members had about that sec-
tion. Much of the document, then, is a listing of options for content and a description of considerations one must keep in mind in teaching these sessions. Depending on the audience, the time constraints, and the institutional structure, elements of this model can be selected for inclusion in a particular program. It is important to remember that limited, carefully selected content is most appropriate for this clientele—pick and choose from these offerings sparingly.

**Instructional strategies**

Before planning specific content, one must consider the parameters within which one is offering the session, the priorities one has for outcomes, and the ways in which one might convey the content. As mentioned, it is important to keep in mind that, compared with faculty and students, academic administrators and support staff are relatively infrequent library users, and ones who generally have specific, limited library use needs. As much as we want them to know about the library and be proficient users, one of the most important messages conveyed in these instructional sessions is the supportive role and value of the library and library staff in meeting information needs. The presenter’s ability to directly address the information needs of the group will influence their attitude toward the session and toward the library in general. In addition to the specific needs of the attendees, an understanding of how adults learn will affect the selection of instructional strategies. If a decision is necessary, sacrifice content in favor of gaining rapport in presentations and providing plenty of written factual information for users to take back to the office.

I. General considerations affecting instructional decisions.
   I.A. Number of attendees.
   I.B. Size and characteristics of the room.
   I.C. Allotted time.
   I.D. Needs and characteristics of the attendees.
   I.E. Session objectives.
   I.F. Personal style of the presenter(s).

II. Organization and format of the session.
   II.A. Introduction to the session.
   II.A.1. Outline session’s objectives.
   II.A.2. Describe what is to be covered and what attendees can expect to come away with.
   II.A.3. Query a couple of attendees about their reasons for attending, thus focusing attention on specific objectives and individualizing the presentation’s content.
   II.B. Session timing.
   II.B.1. Most timeframes will necessitate an emphasis on lecture format.
   II.B.2. Intersperse lecture/demonstration with 5–10 minutes of “hands-on” examination, questions, or review.
   II.B.3. Avoid overloading attendees with too much information or veering off on tangents inappropriate for their expressed interests/needs.

II.B.4. Prioritize session objectives and restrict content to three or four major concepts or strategies in each segment of the session.

II.C. Session conclusion.
   II.C.1. Recap what has been covered and ask for any last questions.
   II.C.2. If appropriate, allow time at the very end for a brief tour of the reference area, or other parts of the library.
   II.C.3. If specific competencies are among your objectives, use a brief practice worksheet that requires participants to use tools in the reference and/or public catalog areas.

II.D. Session follow-up.
   II.D.1. Consider designing the session evaluation instrument as an instructive review of the session by prefacing questions with content from the session. Return it to the participants after it has been reviewed.
   II.D.2. Provide a list of names and phone numbers of key contact persons.
   II.D.3. Be as accessible as possible for a few weeks after the session for afterthoughts and follow-up. Consider scheduling office hours if necessary.

III. Presentation of the instructional message.
   III.A. Effective communication and presentation skills.
   III.A.1. Include a variety of stimuli, both aural and visual.
   III.A.2. Be aware of the “non-verbals,” such as eye contact, body language, and dress.
   III.A.3. Emphasize key points by varying speech rate, volume or pitch, and explicitly close your presentation by summarizing main points.
   III.A.4. Keep the tone of the session realistic but upbeat. While users should be prepared for time and budget limitations they are likely to confront, they need also to be encouraged to explore the resources the library has to offer.
   III.A.5. Project a friendly, approachable, and competent image, which adds credence to the instructional message and encourages users to make use of services on an ongoing basis after the session.

III.B. Teaching techniques.
   III.B.1. Select instructional method(s) appropriate for adult learners, i.e., those that require active participation and those that allow the group to draw analogies from what they already know to what they are learning. Discussion and group work are highly recommended.
   III.B.2. Use a variety of instructional methods (e.g., media, questioning, “hands-on,” and brainstorming) to sustain interest and to accommodate different learning styles. The variety, however, should be carefully chosen, since an undirected hodge-podge will detract from, rather than support, instructional objectives.
   III.B.3. Teach general concepts and basic strate-
gies of library use, where possible, rather than specific library resources.

III.B.4. Consider including one or two guest speakers from selected library units to provide variety in the presentation.

III.B.5. Individualize the content and involve attendees by asking questions and soliciting comments and examples from at least several individuals.

III.B.6. Give attendees handouts to take away, so they can review key points at their leisure in more detail. Flyers, brochures, and bibliographies are all helpful.

Library departments and services

An organizational chart of the library is helpful as a handout of “names to know,” but librarians should not expect users to perceive the library structure in those terms and should not confine themselves to this structure as a way to organize a general library orientation. Rather, the committee recommends organizing a presentation based on the needs academic administrators and support staff are likely to have. The following outline is one way in which library departments and services can be arranged for a thorough introduction to the library. Since all libraries differ in their collections and their services, varying amounts of attention will be devoted to each category. If specific user needs are known, or if a cursory library introduction is to be offered, even more streamlining will be called for.

I. Orientation to the library.
   I.A. Library hours (regular, holiday and summer).
   I.B. General layout of the library.
   I.C. Library departments and their functions.
   I.D. Special collections and branch libraries.
   I.E. Contact persons within the library.
   I.F. Suggestions, comments and complaints.

II. User privileges.
   II.A. Check-out and return of materials.
   II.A.1. User registration.
   II.A.2. Loan periods for faculty, students, and staff.
   II.A.3. Renewals and fines for overdue materials.
   II.A.4. Holds and recalls.
   II.A.5. Searches for books not found on the shelves.
   II.B. Photocopying facilities.
   II.B.1. Location and costs.
   II.B.2. Departmental accounts.
   II.B.3. Copyright rules and regulations.
   II.C. Interlibrary loan.
   II.C.1. Policies governing ILL.
   II.C.2. Reciprocal arrangements and consortia memberships.

II.C.3. Procedures for requesting loans, photocopies, and microforms.
II.C.4. Departmental accounts.
II.D. Document delivery.

III. Acquisition of library materials.
   III.A. Contact people in the library.
   III.B. Departmental budgets/fund allocations.
   III.C. Approval plans and standing orders.
   III.D. Gifts.

IV. Information services.
   IV.A. Reference and information desks.
   IV.B. Telephone reference service.
   IV.C. Catalog assistance, including service to users accessing catalogs remotely.
   IV.D. Computerized information retrieval.
   IV.E. Bibliographic instruction.
   IV.F. Library brochures, newsletters, and handouts.

Access to and retrieval of information

Depending upon the library’s policies, access to and retrieval of information within the library may be entirely different processes for academic administrators and support staff. No matter what level of assistance is provided for “v.i.p.’s” on campus, it is almost certainly true that academic administrators will frequently send someone else to the library for them. A library session for this group must address the issues of 1) reasonable expectations for library service, and 2) defining information needs for librarians and support staff.

Library instruction for support staff should start with a basic introduction to the organization of material within the library system. In many cases support staff will have had little library experience of any kind and may indeed have no idea of the complexity of the academic library. Terms such as “bibliographic citation,” “serial,” or “call number” are likely to be meaningless to them. Most of them will have no use for a session on search strategies in specific disciplines or on library research methodology. An instructional session for support staff must focus on the basics, i.e., 1) how to approach the library with an information need, and 2) how to identify and retrieve an item from the library system. This process of access and retrieval can be divided into five instructional topics: advance preparation, reading citations, locating books, locating periodicals, and locating other types of information.

I. Preparing the request.
   I.A. Defining the information need.
   I.A.1. Clarifying the request, especially for support staff serving as intermediaries.
   I.A.2. Presenting all relevant information about the request in a clear and specific manner—who,
what, when, where, why, and how much.
I.B. Planning library time.
I.B.1. Deciding whom to call or approach for assistance.
I.B.2. Estimating how long it will take to find the information or retrieve the item.
I.B.3. Making sure you have library cards, permission letters, or account numbers as appropriate.

II. Reading citations.
II.A. Identifying complete bibliographic citations.
II.B. Distinguishing between book, journal, and other citations.
II.C. Determining elements of the citation needed to locate an item.

III. Locating books.
III.A. Using Library of Congress Subject Headings or other appropriate source(s) to identify books by subject.
III.B. Searching appropriate library catalog(s), e.g., card, COM, or online.
III.C. Interpreting the information found on the catalog record.
III.D. Identifying the location of a book within the library system.
III.E. Understanding the library’s classification system(s) and interpreting call numbers.
III.F. Locating a book on the shelf.
III.G. Taking appropriate steps if a book is not found in the catalog(s), i.e., interlibrary loan, other resource centers, etc.
III.H. Taking appropriate steps if a book is not found on the shelf, i.e., reshelving areas, recalls, holds, reference assistance, etc.

IV. Locating periodical articles.
IV.A. Identifying and using printed or computerized indexes and abstracts to locate periodical citations.
IV.B. Interpreting entries from indexes, abstracts, and printouts.
IV.C. Searching appropriate catalog(s) or list(s) to determine if a periodical is owned and its location.
IV.D. Locating a periodical on the shelf.
IV.E. Taking appropriate steps if a periodical is not in the collection.
IV.F. Taking appropriate steps if a periodical is not found on the shelf.

V. Locating other types of information.
V.A. Understanding the role of the reference librarian and other staff.
V.B. Consulting reference materials for other types of information such as biographical material, book reviews, documents, statistics, illustrations, and maps.
V.C. Identifying other appropriate information sources such as government publications, media, commercial databases, special collections, and other resource center holdings.

Reference tools
This section provides a list of sources which committee members believe will be most useful in meeting the general information needs of academic administrators and support staff. Inclusion in this list by no means indicates endorsement of the quality of information provided by the source: rather, these sources are commonly asked for and/or needed by these users. The list is by no means comprehensive. For example, indexes and abstracts are excluded entirely because there are too many possibilities to list. In planning an instruction session, the librarian should tailor the list to the requirements of the individual group being addressed. The committee suggests that all sources be presented in subject or functional categories rather than by format and that reference librarians be presented as resources for identifying, accessing, and evaluating tools for any information need.

Academic rankings

Association and organization directories
Directory of Directories. Detroit: Information Enterprises; distributed by Gale Research, 1980–.
Encyclopedia of Associations. Detroit: Gale Research, 1956–.
Research Centers Directory. Detroit: Gale Research, 1960–.

Biographical sources and directories of scholars
Biography and Genealogy Master Index: Supplement. Detroit: Gale Research, 1981/82–.
National Faculty Directory. Detroit: Gale Research, 1970–.
Many professional associations have membership directories which should be consulted as well.
Book reviews

Book Review Digest. New York: H.W. Wilson, 1905-.
Book Review Index. Detroit: Gale Research, 1965-.
Education Index. New York: H.W. Wilson, 1929/32-.

Business communications


Education and school directories

College Blue Book. New York: Macmillan Information, 1923-.
Commonwealth Universities Yearbook. London: Association of Commonwealth Universities, 1914-.
Patterson's American Education. Mount Prospect, Ill.: Educational Directories, 1904-.
Private Independent Schools. Wallingford, Conn.: Bunting and Lyon, 1943-.
Study Abroad. Paris: UNESCO, 1948-.

Grants and foundations

Annual Register of Grant Support. Chicago: Marquis Academic Media, Marquis Who's Who, 1969-.
Corporate Foundation Profiles. New York: Foundation Center, 1980-.
Foundation Directory. New York: Foundation Center, 1960-.
Foundation Grants to Individuals. New York: Foundation Center, 1977-.


Higher education accreditation

Each regional accrediting association has the accreditation requirements and lists of accredited institutions. The WASC Directory and Handbook have been listed as examples.

Higher education curricula

College Catalog Collection on Microfiche. San Diego: Career Guidance Foundation, 1971-.

Publishing directories

Gale Directory of Publications. Detroit: Gale Research, 1987-.
Literary Market Place. New York: R.R. Bowker, 1940-.
Working Press of the Nation. Chicago: National Research Bureau, 1945-.
Many subject fields also have directories of journals and publishers that are designed for scholars seeking to submit manuscripts.

Quotations and proverbs

Bartlett, John. Familiar Quotations. Boston: Little, Brown, 1855-.
ing this pragmatic-oriented group of users. One motivation for reaching out to this neglected group may be the public relations benefits of increased use and support, but another equally rewarding outcome is the knowledge that one has contributed to the lifelong learning skills of one's colleagues in higher education. As lofty as this goal may seem, dynamic content and instructional style can help to make this dream a reality for everyone involved!

**Bibliography**


The committee gratefully acknowledges the sample handouts, planning documents, forms, flyers, exercises, scripts, schedules, bibliographies, and resource lists provided by the following librarians who have offered instruction sessions for academic administrators and/or support staff: Sylvia Bender-Lamb (University of the Pacific), Donald Kenney (Virginia Polytechnic), and Thomas Patterson (University of Maine at Orono). Ideas were also culled from a letter to the committee from Donald J. White (University of Victoria) describing their library’s program.

Editor’s Note: This document was created by the Bibliographic Instruction for Educators Committee of the Education and Behavioral Sciences Section of ACRL. Committee members who participated in the creation of this document are: Emily Bergman, Barbara Celine, Mary C. Clarkson, Tara Lynn Fulton (chair), Bonnie Gratch, Patricia M. Kissinger, JoAnn Mulehiill, Mary M. Nofsinger, David J. Norden, Jean Thompson, and Charles Thurston.
"Libraries and Museums: Leaves From Each Other's Books" is the theme of the Twenty-Ninth Preconference of the ACRL Rare Books and Manuscripts Section, to be held in New Orleans from July 5–8, 1988. The papers will focus on the relationship between libraries, in particular special collections libraries, and the museum world. How does the difference in mission and context of the two worlds affect similar functions, such as processing and cataloging, services to the public, exhibits, public programs or fund raising? Is one institution more effective in some aspects than the other? How are similar materials handled in each type of institution? How do researchers use these materials? What can each institution learn from the other?

These and other questions will be investigated by speakers from various types of libraries and museums. Included will be: William Cagle (director, Lilly Library, University of Indiana) on "Libraries in the Museum World"; Werner Gundersheimer (director, Folger Shakespeare Library) on "Two Noble Kinsmen: Libraries and Museums"; Nancy E. Gwinn (assistant director for collections management, Smithsonian Institution Libraries) on "Smithsonian Institution Libraries: Afoot in Three Camps"; Anthony Harvey (coordinator of planning and development, British Museum of Natural History) on "An Attitude of Mind: Marketing and the Librarian"; Thomas Schlereth (American Studies Department, University of Notre Dame) on "Words and Things: One Historian's Craft"; and Deirdre C. Stam (School of Information Studies, Syracuse University) on "A Quest for a Code, or A Brief History of the Cataloguing of Art Objects by Means of the Computer." There will also be a panel discussion on "Perspectives of Specialized Institutions," with Robert Martin (assistant director for special collections, Louisiana State University, Baton Rouge) as moderator, and the following participants: Ralph Draughon (curator of manuscripts, The Historic New Orleans Collection), Michael Edmonds (head, Library Public Services, State Historical Society of Wisconsin), and Curtis Jerde (curator, Hogan Jazz Archive, Tulane University Library).

To complement the plenary sessions, the Continuing Education Committee has planned a variety of seminars intended to encourage discussion by Preconference participants on practical aspects of the program theme and other topical issues. Topics will include: conservation in special collections; exhibition catalogs; grant proposals for preservation and access; interlibrary loan of rare materials; locating literary manuscripts and letters; security and risk management in special collections; short title catalog projects; handling of artifacts and art objects in special collections; and collecting fine printing in the South.

The Preconference will open on Tuesday, July 5, with a reception at the Historic New Orleans Collection, 533 Royal Street. Additional receptions will be held on Wednesday evening, July 6, at the Tulane University Library, and on Thursday evening, July 7, at the Hermitage Plantation, the restored ante-bellum home of Dr. and Mrs. Robert C. Judice. Also on Thursday participants will be taken by bus to the campus of Louisiana State University in Baton Rouge for program events and a luncheon at the Faculty Club.

Registration for the Preconference is limited to the first 250 applicants. The registration fee is $110 for ACRL members and $140 for non-members. The deadline for registration is June 3, 1988. Late registration will be accepted on a space-available basis after June 3 at an additional cost of $25 per person. Copies of the registration form can be obtained by writing or calling: RBMS Preconference, ACRL/ALA, 50 E. Huron St., Chicago, IL 60611; (312) 944-6780; (800) 545-2433. The Preconference hotel is the Omni Royal Orleans in the French Quarter. Rates are $65 for single, double and twin; $20 additional for a third person. A housing form will be sent upon receipt of registration.

Alice Schreyer is chair of the Rare Books and Manuscripts Section of ACRL. Members of the Preconference Program Committee are: Ann Gwyn (chair), John Cole, Ellen Dunlap, Joan Friedman, Robert Martin (chair, Local Arrangements) and Barbara Paulson.

Extended campus comments

ACRL’s Task Force to Review the Guidelines for Extended Campus Library Services has requested written comments on those guidelines that originally appeared in C&RL News, March 1982, pp. 86–88. Correspondence should be forwarded to the chair, Mary Joyce Pickett, 327 Eighth Street, Downers Grove, IL 60615, and should be received by June 1. The Task Force will also hold open hearings at the ALA Annual Conference in New Orleans and at the Off-Campus Library Services Conference in Charleston. Specific times and places for these hearings to be announced at a later date.
Collection Development in the Electronic Age

A Preconference to the ALA Annual Conference
Sponsored by the Resources & Technical Services Division
New Orleans, Louisiana
July 8, 1988

Goals & Objectives: This preconference will assess the current and future impact of information technology on collection development and present the state-of-the art in incorporating electronic media into the tradition of collection building.

Audience: Library administrators and collection development staff charged with determining the form and substance of library collections and allocating funds to develop an institution’s resources.

Location and Housing: The preconference will be held at the New Orleans Marriott. For housing information, see the January, 1988 issue of American Libraries.

Faculty: Sam Demas, Collection Development, Mann Library, Cornell University; Hendrik Edelman, Professor, School of Communication, Information, and Library Studies, Rutgers University; Robert Hayes, Dean, School of Library and Information Science, UCLA; Sheila Intner, Associate Professor, Graduate School of Library and Information Science, Simmons College; Ken King, President, EDUCOM; Robert Miranda, President, Pergamon Press, Inc.; Jan Kennedy Olsen, Director, Mann Library, Cornell University; Carol Risher, Director of Copyright and New Technology, Association of American Publishers; Barbara Robinson, Management Consultant, and adjunct faculty, Catholic University School of Library and Information Science; Linda Stewart, Reference, Mann Library, Cornell University.

Schedule

Part I: Framing the Issues
8:30 - 9:30 a.m. The Scholar & His Information: A Look at the 1990’s, K. King
9:30 - 10:30 a.m. Managing Scholarly Information: Implications & Strategies, R. Hayes
10:30 - 11:00 a.m. Coffee Break
11:00 - 12:00 p.m. Electronic Information: Public Policy Issues, C. Risher and B. Robinson
12:00 - 1:30 p.m. Lunch (On Your Own)

Part II: Meeting the Challenges
2:15 - 3:45 p.m. Mainstreaming Electronic Formats, S. Demas, S. Intner, R. Miranda, & L. Stewart
3:45 - 4:15 p.m. Coffee Break
4:15 - 5:00 p.m. A New Paradigm for Scholarly Information & The Research Library, J. K. Olsen
5:00 - 6:30 p.m. Wine and Cheese Reception

Registration: Registration fees are $90 for ALA/RTSD personal members, $100 for ALA personal members, and $110 for non-members of ALA. Fee covers registration, coffee breaks, and wine and cheese reception. Lunch is not included. Registrations postmarked before June 10, 1988 will be accepted on a first-come, first-served basis. (Limit is 150 persons.)

To register, contact RTSD Preconferences by phone or mail:
RTSD Preconferences/ALA
50 East Huron Street
Chicago, IL 60611
312/944-6780 ext. 319