

Proceedings of the 7th Annual Federal Depository Library Conference

April 20 - 23, 1998

Training Non-Documents Staff to Do Documents Reference

Cynthia Teague, Michigan State University
East Lansing, MI

Training non-documents staff to do documents reference has been a topic of interest to me for quite some time. I have heard for years that if documents and general reference share a desk, no one will answer documents questions: patrons will be told to come back when the documents specialist is available.

If documents has a separate reference desk, reference will be done well but no one at the reference desk will think to send patrons to you.

Either way you lose. Or rather, the patrons and the documents collection lose.

The answer is obvious: let's train them about documents. This will fix everything.

Well, maybe not. You give a training session and no one comes. Or everyone comes and nods at what you say but nothing on the desk changes. Pretty soon everyone's interest flags and you're right back where you started.

I believe that Michigan State University (MSU) has one of the more successful combined desks that I'm aware of, and I believe that it is due in large part to our training efforts. I'm going to talk about those efforts today.

However, our situation is unique, and our efforts grew out of historical accidents that probably won't be repeated elsewhere. I find that when I attend "how we done it good" talks like this, a part of my mind is busy explaining why someone else's solution won't work at my own institution.

So after I talk about MSU, I'm going to ask you to break up into small groups of five or six people. Each group is going to talk about a particular subset of training issues. Because there are so many of us, there will probably be several small groups talking about each issue. I hope that these groups will be able to come up with variations on the programs that have worked for MSU, and that we may together be able to come up with a broader outline of methods for training non-documents staff to do documents reference.

Michigan State University

MSU has a large Government documents collection, including a Federal collection which has ranged from 80-90 percent selective, a Canadian depository collection, a Michigan depository collection, and a very large collection of documents of inter-governmental organizations ranging from the UN and its subsidiary bodies to regional organizations. Reference for these collections was provided at a separate reference desk until the late 1980's when it became necessary for staffing reasons to combine the documents reference desk with the Social Sciences and Humanities (SSH) reference desk on the same floor.

At first the two functions were separate although they took place at the same desk. One person sat on the documents side of the desk and answered documents questions; another sat on the SSH side and answered social science questions.

This did not prove workable; there just weren't enough documents personnel to cover all the desk hours. Furthermore, as soon as people started trading desk hours the balance was lost.

Here's where something unexpected occurred: the demand for documents was so very high that the non-documents reference staff were forced to learn how to provide documents reference in order to survive. MSU patrons are wild about statistics, and we all know who produces the bulk of the commonly used stats. At one point our desk statistics showed that 85 percent of questions asked at the GD/SSHR desk involved Government documents.

There was no formal training, however; the SSHR staff picked things up on the fly or asked for individual instruction on a particular subject. Some folks were more diligent than others.

In 1993 it was decided that the general reference desk on the first floor would be closed, leaving only an information and referral center (I/R). The general reference staff and their collection would be divided between the two advanced desks: Science and GD/SSHR.

As the time for this change grew closer, we in GD/SSHR grew concerned – the change was going to happen and yet no arrangements had been made for training. Several of us decided to try and develop a desk training manual.

The only notes that seem to remain from this group are two dated four days apart. The first is of a meeting of unit and departmental heads; goals and ambitions are lofty, language is vague. Nothing mentioned at this meeting ever came to pass. The second meeting was attended by a handful of front line reference staff and outlined a prosaic plan:

We agreed that self-paced, written training modules would be the best approach to training so many in so little time. Debbi will consult with Loretta to get her OK for this approach.

If approved, we will provide a suggested format: introduction or overview, if necessary; list of major sources with a description, including hints, tricks, limitations, etc.; 4 or 5 questions which will require using the sources. Already-prepared handouts can be used, but lengthy ones could be edited for conciseness, and

questions must be added. Sources could be listed in order of importance or most important highlighted, so in a pinch a person could hit only the most important and go back to others later. The name and phone number of the resource person should be listed for questions or feedback.

We will send the form to staff asking them to prepare modules in their subject areas. We will request them back by a certain date (as yet to be determined), but will require a list from them immediately of the subject areas they are going to do. Then we will have time to see if there are gaps that need to be filled.

The modules will be put into notebooks. We discussed different color paper or sections for prioritizing them in some way – a "you must do these before you can be on the desk" section. We decided we should survey staff for "what everyone should know" lists, from which we can compile a priorities list.

We also discussed general things everyone should know, such as downloading from CDs, how to use the Government Documents shelflist, SilverPlatter syntax, etc. Also things that might be standardized, such as all desks having a stacks map of their areas, lists of catch names for the uninitiated, etc. 5/23/93

So the basic plan was in place: have desk staff prepare training modules in their area of expertise, including questions and their answers. Distribute these to those I/R staff members who would be joining the department.

As we thought about this, we realized that the I/R people would need to train GD/SSHR staff about their resources (esp. biography) and that this was also a perfect opportunity for GD/SSHR staff to train and retrain each other. The final list of topics is:

Desk Training Notebook Modules (1993)

- Abbreviations
- American History
- Anthropology and Folklore
- ATL (American Thought and Language)
- Biography Sources
- Business
- Citation Indexes
- *Congressional Materials
- Education
- Ethnic Studies
- *Federal Regulations
- *European Communities Legislation
- *EC Citations
- General History
- Military and Naval History
- Prism
- Psychology
- Public Policy

Reviews and Criticism

SilverPlatter

Sources for Statistics

*United Nations

*U.S. Population Census

Women's Studies

*Gov Docs Call Numbers

*Gov Docs Reference Overview

*Gov Docs Shelflist Basics

Here are some samples of the documents training that we offered:

[Rather than reproduce these here, I've put several on the GODORT handout exchange Web site.]

I believe that these training efforts worked for several reasons:

1. Modules were discreet; could be done at own pace.
2. Most topics were well-chosen.
3. Handouts gave step-by-step guidance; could be referred to later.
4. No loss of face was involved; people could learn what they were supposed to have already known without embarrassment.
5. We were all motivated to learn fast to prepare for the shift.

The notebook containing these modules has been very helpful. A copy is kept at the reference desk so it can be referred to if necessary. Copies are given to new staff members. Of course the modules become outdated; many were updated in 1995 or 1996.

However, the notebook topics are all pretty basic, and it began to seem that there ought to be a way to cover more specific topics.

Second Hour Sessions

Most Friday mornings there is a meeting of those who serve on the GD/SSHR desk. At various times these meetings have involved training sessions, but it was a hit or miss affair. A year ago we decided to make a concerted effort to hold regular training during the second hour of these meetings.

Desk staff were asked to suggest topics for possible training, and were also asked to develop a training topic in their subject area. The newly formed training committee then drew up a schedule of topics and trainers. They added to the list of topics, prodded people to choose a subject, and set up a Web site to distribute the information.

[OVERHEAD: Web page topics]

As you can see, topics really run the gamut. What you can't tell is that the presenters are often people who are NOT specialists in that particular area. We've found that sometimes a

humanities librarian may have a better grasp of the problems in providing census reference than someone who has worked extensively with the census for years.

For this and other reasons, we have not made these Web pages public, though we do occasionally point a patron to them.

Note that there are comments in here that are useful for staff but definitely not for the public.

As with the books, one of the big plusses of this system is that there is something to which you can refer back later.

Where we are now: we need to keep training topics vital. We believe that training has to be regular or it will cease to occur. At the same time it has to be useful or people will skip it. Best plan at the moment: a suggestion box at the desk so you can toss in a topic when it's fresh.

I hope this has been helpful; clearly there are many other approaches but this has worked well for us so far.