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Training for Business Reference in General Academic Settings: Preliminary Results from a Recent Survey

A large number of business reference specialists working in an academic setting are the "solo" business librarian at their institution. Two Carnegie Mellon librarians surveyed this type of specialist in the fall of 2003. The focus was to do an exploratory survey that would document the nature of the job for these "solo" librarians, and to investigate some of the administrative features of their departments, the business specialists' perceived attitudes of their colleagues toward business reference, and the workload of these specialists.

Many of the survey respondents requested to be notified about the results. Although the full results of the survey remain under analysis, this article is a summary of the training-related segment of the survey. A second article is planned in a future issue of *Academic BRASS* summarizing the results about managing the workload.

Jean Alexander, the Head of Reference, and Adele Barsh, the Business and Economics Librarian, started out with a curiosity about how their experience in a setting with a general reference department of five professionals (one business specialist) was similar or different from others. They compiled a list of U.S. and a few Canadian librarians from the membership lists of the American Library Association's Business Reference and Services Section, the Association of Research Libraries, and the Special Libraries Association's Business and Finance Division. They eliminated librarians working in a stand-alone business library, but included "solo" business specialists – or in some cases, two or three librarians at an institution – that operated in within a general reference setting. Also included were specialists working "solo" at libraries in campus branches of a larger institution. In October, 268 librarians from 48 states and 3 Canadian provinces were invited by email to participate in a SurveyMonkey questionnaire of 23 questions.

Brief overview of response to survey

There were 132 usable responses (49% response rate). The participants were from 39 states and two Canadian provinces (three Canadian librarians responded out of eleven surveyed).

Figure 1 shows the distribution by size of institution of the respondents. The majority (72%) were from medium- to large-sized universities.

Figure 1

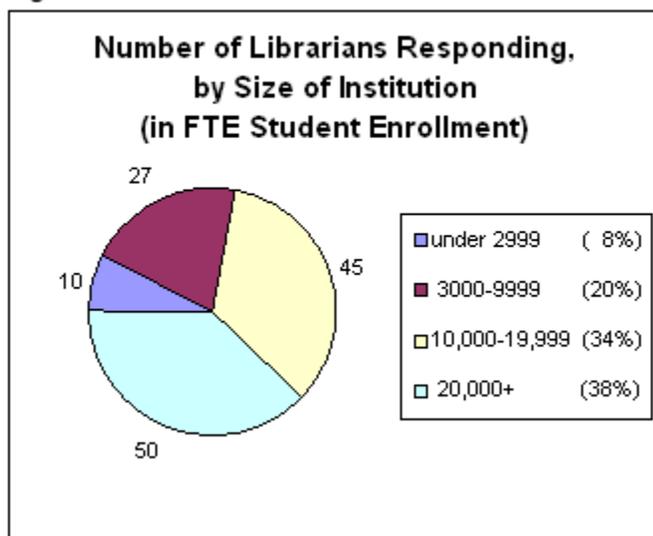
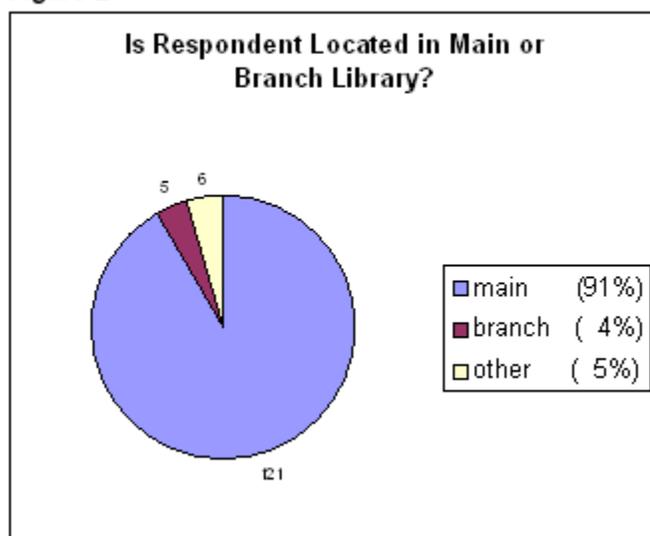


Figure 2

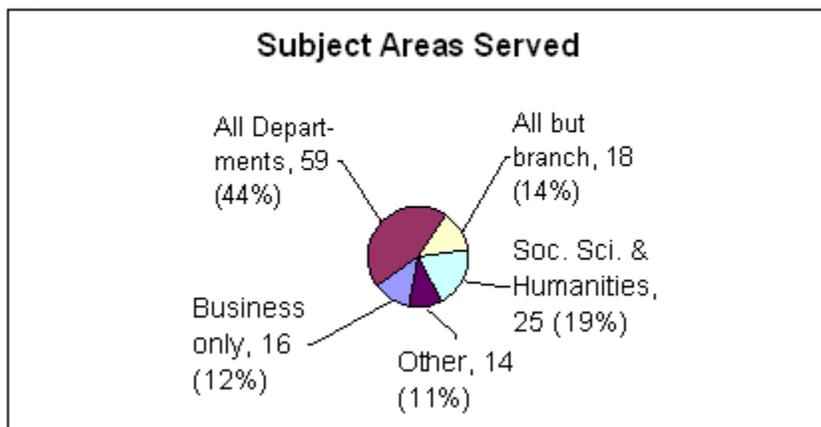


Survey respondents primarily operate within the main library (91%). The "other" category (Figure 2) included three libraries with atypical administrative divisions, a librarian who has an office at both the business school and the library, and a librarian from a general department who within a month of the survey was assigned solely to the business school and its collections.

The majority of respondents surveyed (44%) reported that their reference department serves all subject areas (Figure 3). Fourteen percent work in a department that serves all subject areas except for one or more branch libraries (such as music, medicine, law, etc.). Nineteen percent worked in departments that only serve a combination of Social Sciences and Humanities.

Despite our attempts not to survey librarians in a single-subject library devoted to business, 12% of respondents reported "business-only." However, on closer inspection it seemed that many of those respondents provided information about the departments for which he/she was personally responsible; it was unclear how many, if any, were actually part of a separate business library unit. (The responses of this 12% are included in the discussion of survey results). "Other" (11%) included an infrequent combination of subject departments, such as business with science and engineering, business with nursing and education, business with government documents, etc.

Figure 3



What Respondents Said about Training

Survey participants were asked what kinds of training for business reference is available to librarians in their departments (127 useable responses), and a follow-up question about which type of training they felt is most effective. Figure 4 reveals the types of training they reported. Institutions typically make more than one kind of training available; 106 made three or more types available. The most widely-used training devices are guides and handouts, either as paper or on the web, followed closely by one-on-one work with a business librarian.

Figure 4

What training in business reference is available to librarians in your department?

Check all that apply.

	response total	response percent
Guides & handouts	118	92.9%
One-on-one work with a business librarian	112	88.2%

In-house training workshops	89	70.1%
Vendor workshops	80	63.0%
On-line training	18	14.2%
Other	15	11.8%
Formal coursework	12	9.4%

Respondents' Recommendations

There were 91 useable responses to the question asking what kind of training the respondents recommend and why they think it is effective. Their answers fell into three main types (in order of frequency): some librarians specified which methods that they felt were best and why; others commented on what elements of training are effective across any method; and others' replies were about what works at their particular institution/with their colleagues. Individuals' recommendations were generally consistent with the types of training that were available at their institution, although a few reported on what was effective at past workplaces that, in their current situation, is not effective or cannot be implemented.

The most frequent observation was that one-on-one training worked best, by itself or in conjunction with guides and handouts or other types of training. One-on-one training got consistently strong, positive recommendations, where the next most popular methods got some mixed or less-positive comments. After one-on-one training, the two methods with the most comments were guides/handouts and in-house training.

Points consistently repeated among the responses, regardless of method:

- Business reference training has to be relevant, addressing particular research problems and/or class assignments.
- Training is most effective at the point-of-need, customized to the individual librarian or institution's resources.
- Hands-on experience and a chance for trainees to ask questions is important to the success of one-on-one and workshop settings.
- Having complete, authoritative information available when business specialist cannot be there is useful for both the patrons and the non-specialist librarians.
- Efficiency, currency and peaking of interest are all important features of attracting colleagues' attention for training.
- Communication is key to keeping colleagues up-to-speed on the resources, and there are ways to do this routinely, even in institutions that only have informal training.

- Training should accommodate different learning styles and schedules. Often this is accomplished through providing several modes of training (one-on-one, group, handouts, online tutorials, etc.).
- There are positives and negatives for each approach. (See the [Appendix](#) for a table summarizing respondents' observations regarding each type.)

The respondents noted that training in general has had the effect of developing their colleagues' comfort level and exposure to the material, enhancing or refreshing their awareness of "what's out there," building confidence and competency, and exposing them to new tools and new viewpoints on services.

Several specialists said that focusing on the tools for specific student questions and assignments that their non-specialist colleagues will be facing gets their colleagues' attention. Another feature that maintained colleagues' interest were activities that reinforced skills, providing ways for keeping up with new resources and changes in old ones. Important training tasks include helping non-specialists differentiate among sources and learn how to match resources with in-coming patrons' information needs.

A frustration that specialists face regarding training non-specialists is that "no one wants to learn print resources, just focus on databases." A "double-edged" aspect of training also was mentioned: that sometimes non-specialist colleagues are too reliant on what they think they know from training, and do not consult with specialist when they should.

Several respondents said that they were not convinced training was effective. Problems encountered most often with training include: colleagues' lack of ability to retain what is learned, especially if used infrequently; lack of time on everyone's part (to create or attend training); and lack of interest/motivation on the part of colleagues. Several respondents noted that the complex nature of business questions makes it hard to train comprehensively.

The most-often repeated point about effective training for business reference was that it be hands-on and immediately useful. This means delivering the training at the point-of-need, such as when the colleague(s) is facing a question or set of students coming in with a class assignment. Some recommended training in "small pieces" to fit several types of questions, allowing the colleagues to use the training frequently and apply it to several situations. Hands-on exercises in in-house workshops, or via step-by-step guides with screen shots, were mentioned as the key to retention of what is learned. Participants observed that effective training features ways for the non-specialists to understand the terminology of business, so they can recognize the type of question that the patron is asking. In addition to reviews of business terminology, several respondents also said that they covered why one resource is not always sufficient, and emphasized how to match questions to local resources.

There were training methods that did not fall into the standard categories offered in the questionnaire. Some of these comments were specifically from institutions that did not do much formal training, or from specialists who had to work within certain institutional constraints, be

they time, lack of interest from their colleagues, organizational culture regarding training, etc. Below is a list of these "other" types of training:

- Reminders delivered at departmental meetings (sometimes with supporting materials, such as show-and-tell with print, demonstrations of online products, or handouts).
- "Just-in-time" emails, handouts, or brief in-house instruction sessions about specific assignments students have.
- In-house course for new hires.
- Articles in a quarterly newsletter about new databases and other business resources, or contributing to already existing in-house vehicles.
- Written questions and answers document, covering "entire scope of typical business reference questions."
- Fostering face-to-face discussion, on- or off-desk (offices close to one another, two librarians on a shift together, conversations about resources encouraged in all subject areas).
- Specialist invites generalists to attend bibliographic instruction sessions for business students (in an institution where no formal training is done).
- "I have started providing step-by-step guides with screen captures so that specific types of [online reference tool] searches can be duplicated."

Conclusion

There are a number of business librarians in the position of "solo" specialist in a general academic setting. Their most frequent recommendations for effective training are that one-on-one is "best," but most institutions use more than one type of training venue. Guides and handouts, which serve both the patrons and the non-specialist librarians, are the most-frequent support for training, largely because they can be comprehensive, tailored to a specific institution's resources and research needs, and available at all times. Respondents felt that there were pros and cons to each mode of training. The main features they reported that contribute to effective training are:

- timeliness (currency, point-of-need, efficiency in communication);
- relevancy to the institution's resources and research questions;
- hands-on learning opportunities;
- the ability to interact with the specialist; and
- accommodating a variety of learning styles and schedules.

The participants in general reported having tried many training methods, and fine-tuning their approaches to get the most useful information to colleagues.

This study gathered information from a range of sizes of departments, yet there was the consistency that several types of training were in use and felt to be necessary. The differences seemed to be in the types of obstacles faced among smaller and larger departments. Ongoing analysis continues to be done with the survey data to see if any conclusions can be made about

the size of institution or reference department and type of training available, and whether administrative support or perceived colleagues' attitudes affect the type of training being offered.

A small but significant number of respondents (5%) stated that they were not sure training was effective. Some cited reasons as non-attendance or non-retention of information. Others state that despite training, they report observing limited effectiveness, with no improvements of colleagues' attitude toward or knowledge of business reference. Although some of the problems may be individualistic to a specific institution or individuals, the fact that training is not always taken or retained is an avenue for future investigation. Perhaps gathering more details about specific training methods, and measuring their effectiveness would yield some useful insight. Even a more systematic gathering and reporting of anecdotal information about what has been successful or not may be useful to other specialists, particularly if they are new to training.

A majority of the respondents said that the workload for the solo business specialist was increasing. Providing multiple types of training, or providing time-intensive one-on-one training, is a potential strain on the specialist. Reporting on how the specialists surveyed are managing their workload is an issue that will be tackled in a future issue of *Academic BRASS*. Some of their time-saving tips might have an impact on training-related issues.

Appendix: Summary of Pros and Cons of the Major Types of Training for Business Reference

Table of pros & cons for each training type

Type	Pro	Con
One-on-one	<ul style="list-style-type: none"> • Can adjust training to colleagues' "comfort level" • Point-of-need: can tailor to address real-life research problem "on the spot" • Best retention of information • Best demonstration of the process it takes to answer a question and the context for using particular resources • Especially good when librarian is unfamiliar with "language" of business 	<ul style="list-style-type: none"> • Takes a lot of time • Specialist cannot always be available

Guides/ handouts

- Useful when specialist not present
- Act as ready-reference reminders for non-specialists
- Good for both non-specialists and patrons
- Reinforces what is covered during in-house training
- Great for non-specialists who want "just enough information to direct patrons to the right source"
- Point-of-need
- Information can be complete, and emphasize how to use business website/resources most effectively
- Non-specialists use handouts instead of keeping business librarian "in the loop"
- Not individualized

Vendor workshops

- Useful tips and tricks and for "demystifying" a database
- Attendees get to see all that is possible/available
- Catch up on latest developments and interfaces
- Most vendor representatives very knowledgeable about their products
- Attendance is limited (by time, space, colleagues' attitudes/interests, and other factors)
- Vendors often "more into hyping their product than education"
- Less vendor training available in recent years
- Quality depends heavily on trainers' skills

In-house workshops

- Efficient – trains all reference desk at once
- Allows a refresher in a short period of time, especially for databases other librarians don't use frequently
- Reinforces basic business sources, approaches, common questions and terminology
- Good for sharing in-depth information
- Can deal with topics requested by non-specialists and tailored for local needs/resources
- Lets participants ask "what if" types of questions
- Good forum for using "real-life" patron questions
- Learners do not seem to remember content as well as with one-on-one training
- Many real-life questions too intricate to be covered well in a workshop
- Attendance can be limited (by time, space, colleagues' attitudes/interests, etc.)
- Specialists newer to the field reported feeling they need training themselves

Formal course-work

- "Essential for learning specialty resources in sub-areas of business"
- Many types available: ALA and SLA institutes and workshops, and library school courses
- Non-specialists do not want to bother with formal course work "as long as they can refer questions to me"
- Non-specialists seem to feel coursework is for the specialist, who should report back to others
- Attendance can be limited (by time, colleagues' attitudes/interests, cost, availability)

Online training

- Can reach a wider audience
- Interactive
- Can be course-specific, mini-tutorials, or research guides
- Can provide "subject driven information competence"
- Accommodates a variety of schedules
- Takes time to develop
- Technology learning curve for creation
- Time intensive: Resources change quickly, requiring monitoring and frequent updates of online modules