



## Case Study 5

# REFERENCE ASSOCIATE PROGRAM AT FLORIDA STATE UNIVERSITY: **Training Future Librarians**

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Getting your foot in the door of academic librarianship can be a Sisyphean task. After finishing my MLIS, it took almost three years of cobbled-together part-time paraprofessional library work before I was able to get my first professional librarian job. Along the way, I collected a good amount of job-hunting and professional development tricks and tips as well as a passion to help other new librarians avoid my fate. The Reference Associate Program at FSU was born of this desire to mentor new librarians as well as the need to offer peer-to-peer reference that matched the rest of the peer-to-peer service model FSU Libraries had already implemented.

## FLORIDA STATE UNIVERSITY LIBRARIES

Florida State University (FSU) is a large public university with an enrollment of more than 41,000 students, about 32,000 of which are undergraduate students. The FSU library system consists of seven libraries. The largest is the Robert Manning Strozier Library, which serves the needs of both undergraduate and graduate students. Strozier Library is an extremely popular study location for FSU students and is affectionately nicknamed “Club Stroz.” The university also has a school of information that awards ALA-accredited MLIS degrees.

There are several distinct student areas in Strozier, including the Scholar's Commons for faculty and graduate students, the Learning Commons for undergraduates, Special Collections, and the stacks. The Reference Associate Program was created to assist patrons in the Learning Commons located on the first floor. While this area is geared toward undergraduate students, it is the first point of contact for all library patrons and is open to everyone.

## ***Reference Associate History and Objectives***

Strozier Library moved to a combined service desk model with peer-to-peer services in the mid-2000's after an extensive ethnographic study. The goal of the combined service desk was to staff the service point with undergraduate student workers who specialized in a specific area, such as technology, outreach, circulation, or reference but were cross-trained in all areas. Each student was hired for their specialization by a supervisor who also specialized in that area; they then received cross-training from specialists in other areas. While there was a triage and consultation system in place, many patrons were unaware of walk-up reference services, and the student workers at the desk were not being specifically trained to help with reference. The combined desk did not have designated areas for a particular assistance; instead, patrons stood in one line and went to the first open employee. After the combined service desk was instituted, there was a sharp decline in recorded reference transactions. This could have been due to a number of factors, including student workers not knowing when to mark a transaction as reference, the lack of a clear reference desk, or the new peer-to-peer model. This model had been in place for several years at FSU when I arrived as the reference librarian.

The Reference Associate Program was developed with two goals in mind. The first goal was to meet the need for peer-to-peer reference services, and the second goal was to give aspiring librarians an opportunity to improve their reference and library service skills.

Due to a vacancy in the reference librarian position, there were no undergraduate students specializing in reference at the combined desk when I began. However, rather than continue with providing reference at the main service point, I decided to create the Research Help Now (RHN) desk within eyesight of the combined desk. This desk still works with the peer-to-peer model but allows students a space to get more focused reference help. We chose to call it Research Help Now since students are not always familiar with the term "reference." The physical desk is simply a table with a computer that faces the combined desk and is set to only login for library staff. Originally, the only signage was a digital sign that said "Research Help Now." After the pilot proved itself, a permanent sign reading "Research Help" was put into place.

Rather than use cross-trained undergraduate students, I decided to staff the RHN desk with graduate students currently in or recently graduated from library school. Florida State University has MLIS students, and the Reference Associate Program was created with the

idea of taking advantage of this while also providing its students with the opportunity to gain practical library experience. The FSU Reference Associate Program was influenced by the University of North Carolina at Greensboro's Reference Intern program, which I had previously helped supervise. FSU's human resources (HR) system allows hiring of both current students and recent graduates for this job. Because students often leave library school without any experience, it is important to make the program available to recent library school graduates as well. This also increases the job hiring pool since the majority of FSU MLIS students are online and not located in Tallahassee. The Reference Associate Program works because the students are motivated to get library experience. Since the inception of the program, former reference associates have gone on to work in museums, public libraries, and academic libraries. One hiring manager told me that a former reference associate has applied for an entry-level position, but once they came in and talked about the experience they had gained as a reference associate, the library planned to offer them for a more advanced position with higher pay, thus showing the value of the experience.

The skillset I have attained in working as a research consultant is highly valuable. Not only have I gained knowledge regarding effective customer service, but I have also become a more proficient user and learner of the library in general.

*Sila Lott, Research Consultant, Florida State University*

In order to hire recent graduates, the program is not set up as a traditional internship; however, the program acts as an internship in all but name. Students work at the reference desk, attend required training, and are required to create professional output. The program allows reference associates to stay with us for only four semesters as we do not want them to see it as a permanent job but rather an opportunity to prepare for a permanent job. This frequent turnover means a larger time commitment and more work on the part of the trainers, but the quality of work we receive as well as the ability to help new librarians start on their path to a professional position makes this a worthwhile endeavor

The program was piloted for a semester with four reference associates and then assessed. Assessment was done in three ways, first in the form of daily question tracking on a Google Form that allowed us to see how many questions we received as well as the kinds of questions being answered. Second, we monitored virtual reference and read transcripts to see the quality of the answers as well as sitting in at the desk to watch transactions. Finally, we conducted a summative assessment in the form of an anonymous survey that

the reference associates filled out. This feedback helped us create a more comprehensive program with clearer goals and assessment that will be addressed later in this chapter.

## ***Location and Hours***

Because the combined service desk was overwhelmingly busy with circulation transactions and technology troubleshooting, we decided to create a separate RHN desk. The new RHN desk is close to the main combined desk, and this cluster of service points is making it easier for our students to find help. There are several positives to this model. For example, student workers at the combined desk are able to quickly point out the RHN desk, which helps us reduce the number of patrons that might leave rather than continue to seek help. Our current location also allows reference associates to see students approaching from the front of the library and the back of the library, allowing them to reach more patrons. Being visible is crucial for success, particularly when the service point was new.

We made several decisions about hours and staffing based on the needs of our institution and statistics gathered at both the combined service desk and the RHN desk. When planning for your own program, it is important to look at when librarians are available, when the desk is busiest, and how much time you can budget for each reference associate to work.

This position has challenged me to continue growing, to continue learning, and to keep evolving in a day and age where library users become more interdependent with technology.

*Sila Lott, Research Consultant, Florida State University*

A summary of our staffing model:

- Ideally, the RHN desk is staffed from 10 a.m. until midnight Sunday through Thursday, but when faced with a labor shortage or budget constraints, we opt to fill the later hours, which is when FSU students tend to seek library assistance.
- The reference associates cover in-person and virtual reference while at the desk but have virtual reference backup from staff so they can focus on face-to-face interactions.
- Reference associates cannot work more than twenty-nine hours a week because we are not budgeted to offer them benefits.

- Librarians are available weekdays from 8 a.m. to 6 p.m., so it's important to schedule reference associates during the later hours when no librarians are available to help.
- The RHN desk is not staffed on Fridays due to lack of traffic; however, we do staff on Saturdays since there are no librarians in the building.

It is essential that you do a quick assessment of your own needs, limitations, and services before you set up your own program.

## ADMINISTRATION

### *Management and Staffing*

This program is a part of FSU's Learning Commons. This program is run by one full-time librarian with assistance from one full-time evening staff member. This system works well as the librarian is available during the day, while the staff member is available until 10 p.m., which allows for consistent supervision for the reference associates. Although reference associates work independently at the RHN desk, supervisors are always available as back up. In addition, there are other Learning Commons staff members in the building at all times with the reference associates so they are never too far from help.

It is important to have more than one staff member working with the students for several reasons. First, it's an extensive time commitment to ensure the program is successful. Strategically planning training and having several staff members involved makes it more manageable. Second, having staff members who work different shifts can offer more consistent supervision for reference associates. The more people involved in hiring, training, and planning, the stronger the program will be. Having a diversity of viewpoints is also essential to building a successful program and even more essential to sustaining the program. I can only bring in my own experiences and ideas, but having the experiences and point of view of my staff has been tremendously beneficial to myself and the reference associates. Looking at any program through multiple lenses is one of the best ways to ensure its success. Collaboration strengthens any program.

### *Budgets and Funding*

The budget for the Reference Associate Program comes from the Learning Commons student worker budget. We have a fixed budget and plan for the entire academic year at the start of the fiscal year. Priority is given to staffing the RHN desk during the fall and spring semesters when more students are on-campus, therefore the summer sessions (we have three) have a much more limited schedule.

When considering the budget, we looked at several models of pay rates and staffing hours. While we could have paid a higher rate but staffed fewer hours, we chose to staff more hours with lower pay. The reference associates are at a slightly higher pay range than the



undergraduate student workers and work around twenty hours each. We hope that the professional benefits, such as professional references and experience for future library jobs, help compensate for the pay rate. This information is made clear in during the hiring process and we let potential reference associates know that while it won't be a high-paying job, it will give them a great deal of experience and marketability. This will depend on the institution you are working at as some institutions require higher pay for graduate students.

## ***Promoting the Program***

Marketing and promotion have proved to be one of the more difficult parts of this program, simply because of the size of FSU. The first step in developing promotion was to create signage. At the time of the pilot there was a general signage redesign planned so we were asked not to create permanent signs that might not match the anticipated sign design. We worked around this by having a digital sign created by the library's graphic designer. This sign is displayed on a second computer monitor at the RHN desk and faces patrons. This could also work on a digital picture frame. We also had a web banner created to cycle on the main library website. Clicking on this banner leads to a separate site that lists the hours. In addition, we have handouts with information about the program that we give out at the circulation desk, at information literacy classes, and at library outreach programs. Once the new signage redesign was done for the entire floor a permanent sign was created that reads Research Help.



## **HIRING**

### ***Recruitment***

Recruiting quality applicants can be difficult. The majority of library school students at our institution are distance students, so the pool of potential applicants is limited. While we would like to hire distance students to help with virtual reference, this is not something our HR is currently set up to deal with. This is why we also hire newly graduated MLIS students and do not require that students be in the Florida State University MLIS program. In order to recruit, we send an email to the Information School listserv, advertise with the FSU ALA student chapter, and put an advertisement on [floridalibraryjobs.com](http://floridalibraryjobs.com). The

supervisors also attend the FSU ALA student chapter meetings so that students are aware of the program. In addition to these advertising methods, we ask our reference associates to talk to their classmates and encourage them to apply. As word has gotten out about the program, our pool has grown with each hiring cycle.

## ***Applications and Interviews***

In order to apply for the job, potential candidates are asked to submit a cover letter and résumé. This not only lets us see their job history but also gives us an idea about their experience and knowledge in creating job application materials, something we train them in later.

After the initial screening, we bring in potential candidates for an in-person interview in order for the supervisors to get to know the candidates. We seek candidates who have good customer service skills, positive attitudes, and are not afraid to ask for help. We strive to make it clear to our candidates that we do not expect them to know everything from the start, but we expect them to be willing to learn. We begin by telling them:

I started working more hands-on with the reference associate program in the fall of 2015. I knew that the program was good; I just wished that I knew how effective it was. I now get to see first-hand how well the students are accepting it and much it is being used.

*Supervisor, Florida State University*

The person in this position works to provide reference in the learning commons both in-person and virtually. Because we know we are hiring students/recent graduates, we will be providing weekly training sessions as well as giving an extensive training at the beginning of the semester. We will have some homework and expect the people hired to treat this as both a job and learning opportunity. We will have a semester-long project for each student and will expect some output by the end of the semester. You will not be expected to work extensively outside of your paid hours (other than some homework) but you will be expected to treat this as a true work position and not work on outside homework or socialize with friends during work hours. Our hope is to make you marketable as librarians once you graduate with a greater understanding of providing in-person and virtual reference.

In the interview, we ask general questions, such as why they are interested in the position as well as what strengths they bring to the position. We also ask them several specific

questions about their professional and personal goals as well as their comfort in asking for help. These questions include:

- What type of library are you interested in working in? Why do you think this position will be helpful in achieving this goal?
- What are some of your personal goals this year?
- What areas of libraries are you particularly interested in? What kind of research areas interest you?
- What would you do if a patron asked you a question about a topic you are not familiar with?

We have found that these questions not only help us get to know the candidates but also let the candidates know our expectations upfront.

## TRAINING

### *Instructional Design*

One key to success with the Reference Associate Program has been solid instructional design. Reference associates are student workers and are employed for both the pay and the learning opportunity. In order to deal with this dichotomy, the program is designed as if it were a yearlong class. The instructional design for this program is based on Fink's integrated approach to designing college courses, which requires a backward design with both formative and summative assessment.<sup>1</sup> This instructional design method looks at the needs of the learners, creates learning objectives, and then assessment based on the objectives. After this process, the activities for instruction are created. The Reference Associate Program coordinators met for a full day of instructional design and created the following training program and learning objectives.

### *Learning Objectives*

Fink's integrated approach involves identifying learning objectives for the course. These learning objectives are then used to create an easily used assessment matrix (see Appendix A. Criteria for Assessment) that is given to both the trainers and reference associates so there is full transparency in the assessment process. The following learning goals or objectives were created for the program:

1. Reference associates will be able to evaluate and assess whether or not a reference interaction is a teaching moment.
2. Reference associates will have the confidence to try to answer questions they are unfamiliar with but the respect to refer the question to the appropriate person when necessary.



3. Reference associates will show empathy and interest to patrons as well as to themselves.
4. Reference associates will be able to assess and use library resources effectively.
5. Reference associates will understand and use reference interview techniques for patron interactions.

These learning objectives are based on observations from our first semester with the Reference Associate Program as well as the feedback we received from the pilot program. Having these learning objectives made it simpler to create a training program and to assess how students were doing. Assessment will be discussed later in this chapter.

## ***Communication***

We use our Learning Management System (LMS) system to communicate with reference associates. Because students are accustomed to being on the LMS for class, this is currently the best place to house the manual, weekly journal, and schedule. In general, it is a good communication tool that allows the supervisors to talk with everyone at once and provides a good place for shift swaps.

I have the great pleasure of working with the past and present reference associates. I got to see the creation of the program and the current state, and through it all the focus has been on helping our patrons. Both the students and the associates get to benefit from this program. To me, our program centers on the patrons while teaching our associates the tools that they can use in their future endeavors.

*Supervisor, Florida State University*

## ***Reference Bootcamp***

After the reference associates are hired, they are required to meet for a week of training known as Reference Bootcamp. This training aims to give them the tools they need to successfully act as the first point of contact for reference questions. Having an extended training as a group also has the added benefit of allowing the students to bond, creating a stronger group dynamic. (In addition to the reference associates, we invite any library staff member who is interested in improving their reference skills or getting a “reference refresher” to attend whichever sessions they would like.) This Reference Bootcamp takes place for one week. We meet for several hours on Monday, Wednesday, and Friday, with homework and reading in-between. (See Appendix B. Training Agenda.)

The activities are based on successful information literacy active learning activities. Even the homework incorporates active learning; rather than give them the link to the articles, we provide them with citations and ask the students to use the skills they have just learned to find the articles. (See Appendix A.) We then discuss the methods they used in the next meeting.

While going over the databases, we not only talk about how to use particular databases but what a database is, what journals each one pulls from, how to use the thesaurus, and best practices for searching. The reference associates bring laptops into the classroom in order to follow along with database and resource demonstrations, so it's a more interactive experience.

It is essential to build in time for questions. There is a huge potential for information overload in this bootcamp and it's important that the reference associates leave feeling prepared to work on the desk but not overwhelmed with the amount of information and skills they were expected to learn over the last week. Honestly, there will be some feelings of doubt, so we also make it a point to remind the reference associates that we are always available for them when they have questions.

After Reference Bootcamp, reference associates work at the combined circulation desk for one week in order to be truly cross-trained. They then begin working at the RHN desk and we continue to meet as a group once a week.

What I have attained in the program has been a stepping stone to my future career goals and aspirations. The program reaffirms my passion for libraries.

*Sila Lott, Research Consultant, Florida State University*

## ***Weekly Training***

After the initial training, there is weekly training during which supervisors and reference associates meet for an hour. This training is divided into several parts. The first part is a review of virtual reference and journals. This is a time when the supervisors can discuss the work that reference associates are doing on virtual reference. Exemplary chats are shown and discussed. If there seem to be general issues that reference associates are having in virtual reference, this is a good time and place to address the problems and work on them together. We also discuss what was reported in the weekly journals and offer time to ask

questions. After this, we host invited speakers, go on field trips, or one of the supervisors does a presentation on a particular topic.

Examples of weekly meeting topics:

- Microfilm tour of collections and how to use it
- Using and teaching citation management tools
- Tour of Special Collections at our library
- Tour of the public library
- Instructional design
- Scholarly communication
- Data management
- Collection development
- Working with patrons with Autism Spectrum Disorder

This list, however, is in no way complete. We try to get an idea about what the reference associates are interested in and then plan speakers, workshops, and tours that will be beneficial to them.

Professional development is an important part of training because this is often skipped in library school. One session that is very popular is the presentation on conferences. This presentation reviews how to find conferences, how to navigate them, how to present at them, and how to find scholarships. Another training that the reference associates look forward to is the cover letter and résumé/CV workshop. This training gives them information on how to create a viable résumé or CV, and we create a cover letter together on Google Docs using a real job advertisement. During an ALA annual conference, many of the reference associates visited the ALA JobList Placement & Career Development Center and were told that their CVs and résumés were very well-crafted and showed a great deal more professionalism than many other recent graduates. I also give them advice on the job hunt, such as resources to look for jobs, what to expect on an academic job interview, and general behavior guidelines, like who to address cover letters to as well as thank-you letter etiquette.

Because the reference associate training calendar is based on the school year, there can be repetition for reference associates who have been with the program for more than two semesters. Reference associates who have already seen a particular training are allowed to miss that training, but often it changes just enough from semester to semester that they still can get something out of it. That said, we still try to create a yearly schedule that avoids duplication.

When planning the training calendar, we contact our guest speakers to select mutual training session dates. Then we schedule the remaining open dates for training sessions by supervisors, such as cover letters, citation management, and conference guidance.

## ***Semester-Long Project***

Reference associates are given a semester-long project to work on at the start of the semester. In addition to the weekly training and the hours scheduled at the RHN desk, reference associates are allotted one hour a week to work on their semester-long project. During the first weekly meeting, they are given a prompt and asked to work as a group. Here is an example of a semester-long project prompt:

At the end of this semester, the reference associates will create and present an online training tool together. What this tool will be is up to the group. Communication will take place at the weekly reference associate meetings and via email. You all have one hour of paid time to work on this per week. You can also work on your own parts during downtime at the desk.

## ***Criteria***

This can be any type of online training tool you want; however, it must meet the following criteria:

- Be ADA accessible
- Have at least one learning objective
- Create some form of assessment
- Be useful to the undergraduate population

## ***First Steps***

- Create a timeline.
- Think about what you want to accomplish. What is the problem you are trying to solve? (For example, Citation Fox was created by a library to help with difficult citations.)
- Create one or more learning objectives you want your tool to accomplish.
- Think about what platform you will use. I have no money to offer you, so it will need to be free or something the library already has (a very real-world experience for you!)
- Please feel free to use me or any other librarian/student/professor as a resource.

They are also given deadlines for the project description, a mid-semester presentation, and a final end-of-semester presentation. The reference associates are encouraged to talk with the different speakers from the weekly training to see if they can use some of their experience or knowledge to help them with the project. An invitation is sent to all the previous speakers as well as all library staff to watch the final presentation.

This particular project was highly successful and led to the reference associates getting experience in project management, presenting to large groups which included library administration, and being accepted to present their findings at the Florida Library Association annual conference. The project was embraced by the digital scholarship and technology department of the library, and the project continued into the next semester with the idea of implementing the tool. You can see an iteration of the tool at <https://rhnfsu.wordpress.com>. Even more impressive, during an ALA annual conference, one reference associate spoke to a vendor about the project and the vendor invited the reference associates to give a webinar about the project through the vendor's webinar series. Having the reference associates work on a project that has a practical application is a great opportunity to create tangible evidence of their work and to make a visible impact on the library and library world.

I think that peer-to-peer reference is a good idea because it is a learning experience for both sides. It also may be less intimidating working with someone that you think that you can relate to.

*Supervisor, Florida State University*

## ASSESSMENT

### ***Tracking Sessions***

We keep statistics of every interaction at the RHN desk. Currently, we use Springshare's LibInsight for this record-keeping, though in the past we used LibAnalytics and a free Google Form. From each interaction, we gather the following information: how the patron was helped (in person, online), type of question answered, a brief description of the question, and the reference associate who helped the patron. LibInsight also does an automatic time stamp so we know what time and day the interactions take place.

Keeping track of this information is essential for proving the value of the program. It also lets us see when we are getting the most and fewest interactions, which is helpful when we have to cut or add hours to the desk. These numbers are also important in assessing the usefulness of the program, as we can see the number of interactions that take place. Because we have been keeping this kind of information for years, we were able to see a 13 percent increase in reference questions in the first two years the RHN desk was put into place.

## ***Student Assessment***

We ask for two types of assessment from our reference associates: self-assessment and assessment of the program. In order to allow for formative and self-assessment throughout the semester, reference associates are required to keep a weekly journal on our LMS site. This lets them check in and see if they are meeting the learning objectives of the program as well as ask questions about things that happened on the desk. The added bonus of having these journals on the LMS is that both the supervisors and the other reference associates can comment, making the journals collaborative. Feedback has shown that reference associates prefer a particular prompt each week rather than just writing about their time at the desk.

We have a summative assessment at the end of each semester in which reference associates fill out an anonymous survey evaluating the Reference Associate Program as a whole. The comments in the surveys are important in reshaping any part of the program that is not working. The reference associates also do a final journal entry and assess if they met all the learning objectives over the semester.

## ***Evaluating Reference Associates***

There is informal evaluation throughout the semester for each reference associate, with communication taking place one-on-one as needed. (See Appendix B.) There are also two formal evaluations. The first one takes place mid-semester and is a good time to reflect on how each reference associate is doing and if they need any changes. This also is a good time for the supervisors to make sure the training is in line with reference associates' needs. At the end of the semester, the supervisors collaborate to write a formal evaluation letter. This letter is presented to the reference associate and is saved by the supervisors to help with reference letters in the future.

## **REFLECTION**

Working with reference associates has proved to be challenging but rewarding. The fact that reference associates all want to become professional librarians makes them enthusiastic and results in a great work ethic. This makes them a pleasure to work with and also helps reinvigorate the librarians working with them. The mentor relationship that the supervisors are able to form with the reference associates is a rewarding one that is mutually beneficial. Librarians and staff members are able to pass on knowledge while at the same time learn to see the process with new eyes. When we do the same thing over and over, it becomes too easy to see it as routine and boring. Watching reference associates get excited about answering questions that might strike me as run-of-the-mill helps to remind me why I got into the profession in the first place.



## ***Challenges and Success***

Creating the Reference Associate Program from scratch presented a number of challenges as well as successes. One particular challenge was setting up the comprehensive training program. The training described earlier is a direct result of lessons learned from the pilot program. Approaching the training program as a class and using instructional design made planning the program easier and also made the program more successful. Using an integrated approach as well as making the learning objectives clear from the start was also more beneficial to the reference associates.

I am happy that I got to witness this program from the start and to watch it grow. I am very proud of the small part that I played, and I think that this program has done a great service to the library as a whole.

*Supervisor, Florida State University*

## ***Future Plans***

Since writing this chapter I have left my position at Florida State Universities, but the reference associate program continues and evolves under new management. One of the best things about this program is that the reference associates help to direct its future. Changes are made based on the successes and failures of the semester. The program has continued to grow and show its worth. Thanks to the proven success of the program, budget significantly increased and the reference associates continue to be valued.

I am fortunate to have had the experience of collaborating with the reference associates because they are not just library school students; they are my future colleagues. The reference associate program will continue to grow and change just as the field of librarianship does. And as it does, I am excited to see the librarians it will help to produce.

# APPENDIX A

## CRITERIA FOR ASSESSMENT

Learning Objective	Poor	Acceptable	Exceptional
Reference associate will be able to evaluate and assess whether or not a reference interaction is a teaching moment.	Reference associate always tries to teach the full process of finding reference material without taking time to understand patrons' needs.  <i>Or</i> Reference associate provides a resource with no explanation.	Reference associate answers question, explains how they got the answer, does not perform full reference interview.	Reference associate performs full reference interview to understand needs of patron and gauges their reactions to teaching. Student asks patron if they would like to learn how to do more of the same sort of research. Reference associate does not force teaching if it is not wanted by patron. Reference associate offers referral for further learning if appropriate.
Reference associate will have the confidence to try to answer questions they are unfamiliar with but the respect to refer the question onto the appropriate person.	Reference associate says "I don't know," and ends interaction there.  <i>Or</i> Reference associate spends over 15 minutes on the question, does not find an answer or refer patron to correct person for help.	Reference associate makes an effort to find the answer if they can't they refer patron to supervisor.  <i>Or</i> Reference associate spends less than 10 minutes on the question and refers it to appropriate person if they can't find answer.	Reference associate shows reflective listening skills and makes an effort to find the answer while keeping patron informed. If after 5–10 minutes of searching and interacting Reference associate cannot find answer, they will refer patron to the appropriate subject librarian, staff member, or librarian.
Reference associate will show empathy and interest to patrons as well as to themselves.	Reference associate has closed-off body language and doesn't look up from the computer.  <i>Or</i> Reference associate dismisses patrons' perceived needs.  <i>Or</i> Reference associate makes assumptions about patron without doing actual reference interview.	Reference associate makes eye contact and smiles. Student listens to the question but may not use reflective language or continue with the reference interview after a certain point.	Reference associate projects empathy with eye contact, smiling and open body language. Reference associate takes the time to listen to patron fully, uses reflective language, and checks back with them frequently to make sure they are on the right path for research.

<b>Learning Objective</b>	<b>Poor</b>	<b>Acceptable</b>	<b>Exceptional</b>
Reference associate will be able to assess and use library resources effectively.	Reference associate has one or two go-to resources and does not make an effort to learn and use new resources.	Reference associate uses the most popular databases, catalog, and the "I need to" section of the website.	Reference associate uses research guides, subject databases, and guides outside of the library website to find information.
Reference associate will understand and use reference interview techniques for patron interactions.	Reference associate answers the initial question without doing any reference interview.  <i>Or</i> Reference associate leaves out two reference interview steps: greeting, asking open questions, finding resource, follow-up, and kind sendoff.	Reference associate leaves out one reference interview step.  <i>Or</i> Reference associate answers question but doesn't do follow up.	Reference associate performs complete reference interview with all steps and answers question correctly. If they can't find the answer, presents a good referral. Reports questions/ concerns to supervisor.

# APPENDIX B

## TRAINING AGENDA

The bolded words have active learning activities associated with them.

### **Monday: 1 p.m.–4 p.m.**

1:00–1:15 **Introductions**

Have students interview each other, then introduce each other to the group.

1:15–1:45 Blackboard/general policies

1:45–2:30 Library tour

2:30–2:40 Break

2:40–3:00 Library website

Catalog, journal finder, databases, research guides

3:00–3:45 **Reference Interview**

3:45–4:30 **Keywords**

Homework:

- Post reflection in Blackboard.
- Read: Harmeyer, D. “Hybrid Reference: Blending the Reference Interview and Information Literacy.” *Reference Librarian*, 51(4) (2010): 358–362.
- Read the student manual and sign.

### **Wednesday: 9:30 a.m.–3:30 p.m.**

9:30–9:50 Logging hours, desk in office, space to put things

9:50–10:20 Circulation

10:20–10:30 Break

10:30–11:00 Discuss reading and thoughts concerns so far

11:00–12:00 **Virtual Reference**

12:00–1:00 Lunch on your own

1:00–1:30 Learning objectives and assessment

1:30–3:00 Academic search complete/**database activity**

3:00–3:30 FAQ

Book reviews, opinions, peer-reviewed articles, newspaper articles

Homework:

- Read: Schwartz, H. R., & Trott, B. b. “The Application of RUSA Standards to the Virtual Reference Interview.” *Reference & User Services Quarterly* 54(1) (2014): 8–11.
- Find one article about emerging trends in libraries that interests you. Read and summarize. Be prepared to explain your research process to the group on Friday.

**Friday 9:30 a.m.–2:30 p.m.**

9:30–10:00 Discuss reading and article you found

10:30–11:00 Reference databases

Opposing viewpoints, Oxford Digital Reference Shelf, Biography in Context

11:00–11:30 Citations

11:30–11:45 Triage

11:45–1:00 Lunch together (my treat for reference associates)

1:00–2:00 **Threshold concepts**

- 2:00–2:30 Wrap up, time for questions

Homework:

Post Reflection in Blackboard

## ***Bootcamp Activities***

### **Introductions**

This is a simple activity that lets reference associates get to know each other, practice their interview skills, and practice their presentation skills. Reference associates are paired up (if there is an odd number, a supervisor pairs up) and given the following questions to ask their partner:

- Name
- Kind of library they want to work in
- Where they are from
- Interesting fact

After a few minutes of letting the reference associates interview each other, they take turns presenting their partner to the group.

### **Reference Interview**

In order to learn about reference interviews, we first go over a PowerPoint presentation that explains the reference interview (<http://bit.ly/1NBPFUH>). For the activity, we split reference associates into groups of two. If there is an odd number, one of the supervisors acts as a partner. Each reference associate is given a sheet of paper with a scenario and a prompt. One reference associate plays the “patron” and the other is the “librarian.” The patron reads the scenario to themselves and only asks the prompt. It is then the job of the librarian to figure out what the patron actually needs, using the reference interview. It is a good idea to have the reference interview steps available for reference associates to refer to during this activity. The students take turns playing the librarian and patron and then go in front of the group with different scenarios and prompts. We then discuss the activity and why it’s so important to do a full reference interview.

## Examples

1. Scenario: You are a freshman in a Biology 101 class that wants to find out when cats were domesticated.

Prompt: I need some help finding information on cats.

2. Scenario: You are an underclassman taking a sociology class about modern slavery. Your professor has told you to write a paper about any topic on modern-day slavery but you must have three resources, one book, one article, and you get bonus points if you have a primary source.

Prompt: Are there any books on slavery here?

3. Scenario: You have never cited anything before but your professor has told you that you need to cite three articles for your paper in APA style. You found the articles through one search but are not sure how to cite them.

Prompt: Hi. I need some help with citation.

## Keywords

This activity is intended to get reference associates thinking about keywords and understanding the different ways people might describe the same thing. The reference associates are divided into two groups and given whiteboard markers and whiteboards. Then a series of pictures are shown. These pictures tend to be full of activity, one example being a man dressed as Elmo being arrested in Times Square. Each picture is put up for a few minutes, during which each team must write as many keywords that they can come up with to describe the picture or aspects of the picture. After each picture, we look at the keywords and phrases each team comes up with and discuss the different ways things can be described. We generally show three or four pictures and then show several research questions and ask them to come up with keywords.

## Virtual Reference

This activity gives reference associates the opportunity to practice with virtual reference. We first go over best practices for virtual reference and how to use our software. Then the reference associates take turns coming to the main screen and answering chat questions that the supervisor sends in. It is important if you are using your live chat service that you let other librarians on virtual reference know there is training going on. You can also create a separate training queue if your software allows for this. While the reference associate is in front of the group, the other reference associates are encouraged to help them and they all work together to answer chat questions.

## Database Activity

This activity is done after they have been introduced to Academic Search Complete. It aims to teach reference associates how a database works so they can provide better reference.



Reference associates are divided into groups of two. Each group is given a database. You can allow the students to pick their own databases that they are interested in or you can assign ones you think will be helpful for everyone to know. The reference associates are then given a worksheet with the following questions to answer.

1. What subject does the database cover?
2. Can you find what resources the database is using? List some of the resource or journals and be ready to show the group.
3. What are some of the limiters?
4. What tools are available?
5. How can students save the articles or get back to the articles?
6. What is unique about this database?
7. Are there any other things you want to tell the group about this database?

The reference associates then present to the rest of the group and in the process learn about database structure as well as finding out about some specific databases the library has.

### **Threshold Concepts**

This is a simple discussion. We hand out a copy of the ACRL *Framework* and give everyone a chance to read over them. There is then a led discussion about how we can incorporate these ideas into reference and virtual reference.

## **NOTES**

1. L. Dee Fink, "A Self-Directed Guide to Designing Courses for Significant Learning," Dee Fink & Associates, last modified August 2005, <http://www.deefinkandassociates.com/GuidetoCourseDesignAug05.pdf>.

## **BIBLIOGRAPHY**

- Fink, L. Dee. "A Self-Directed Guide to Designing Courses for Significant Learning." Dee Fink & Associates. Accessed July 20, 2016. <http://www.deefinkandassociates.com/GuidetoCourseDesignAug05.pdf>.

