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Presentation

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TITLE: Personnel Management and Training for Digital Reference Services

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ABSTRACT: Overview of digital reference training, and how it integrates with digital reference management.

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Personnel Management and Training for Digital Reference Services

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- Module 3
 - www.vrd.org/StarterKit
- Don't Let it Throw You:
 - K-12 Language
 - AskA Language
 - Publication Date

AskA Starter Kit

How to Build and Maintain
Digital Reference Services



R. David Lankes & Abby S. Kasowitz



Drawing from the Starter Kit

- Planned preparation of individuals involved in the creation, maintenance, and operations of a digital reference service
- An opportunity to challenge staff, improve quality, and impart the values of the organization



Training

- New Skills
- New Technology
- New Policies - Consistency
- New Staff (local and remote)



Why A Training Program?

Management

Instruction and resources on creating and maintaining digital reference services

Define Strategy

Information Specialists

Training on general issues in responding to digital reference inquiries

Answer questions

Support Staff

Training on day-to-day operations

Route questions

Monitor responses

Maintain service resources



Who is Trained?



Create Training Plan



Produce Training Program



Implement and Manage Training Program



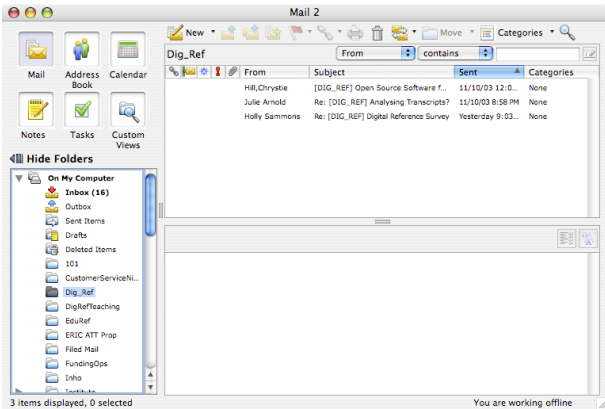
Training Plan Phases

What should staff be able to perform as a result of this training?

- Tasks
- Skills
- Current Skills and Knowledge
- Create Goal Statement



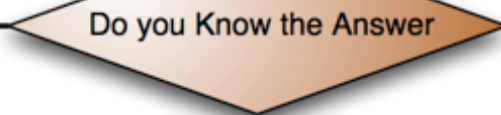
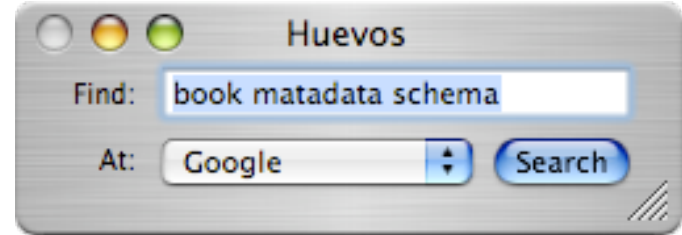
Establish Training Goals



Open Message

Select "Reply"
Command

Greet User
by Name



YES

Type Answer and/or
References in
Response

Send Message

NO

Conduct Search

YES

NO



Refer User to
Alternative Service or
Source



Using Process to Define Goals

How should information be presented and training activities be administered in order to get the most out of the training program?

- Define Objectives
- Specify Treatments
 - Choose and Organize Content
 - Choose Materials and Activities



Select & Organize
Training Components

- Web page
- E-mail
- Real-Time Communications
- Print-Based Materials
- Instructor-Led Presentation/Class
- One-on-One Mentoring
- Computer-Based Instruction
 - WebCT, Qarbon



Select Delivery Methods

Delivery Tool	Present Information	Discussion	Practice	Feedback	Job Aids	Comments
Web Pages	✓		✓	✓	✓	Attractive Presentation Allows hyperlinks to basic and supplemental information.
Instructor Lead	✓	✓	✓	✓	Handouts	Good for introducing topics; must follow up with review and practice and feedback Can be done at conference



Delivery Matrix

- Text-Based Only
- Text--Practice--Feedback
- Text--Shadow and Observation--Practice--Feedback
- In-Person Class--Text--Practice--Feedback



Training Models

What criteria will be used to determine whether or not trainees are prepared to perform required tasks following the training program?

- Test Proficiency Before Participating?
- Monitor Responses During Participation?
- What Criteria Will Be Used to Judge Performance?
- How Will You Communicate Performance to Staff?



Create Learner Assessment Plan

What are the most efficient and effective ways to develop and organize planned materials and activities?

- Set Expectations
- Create Positive Attitude
- Provide Clear Information and Examples
- Provide Opportunities for Practice and Feedback
- Provide Post-Training Help and Reinforcement



Create Training Materials

What is involved in securing and preparing tools and equipment to implement program?

- Technical Issues for Service and Participants
- Skills Necessary for Individuals Developing, Implementing, and Managing Tools
- Aesthetic Possibilities and Limitations of Tools



Prepare Delivery Tools

How will the program be tested in order to determine if training materials and activities will be successful?

- Effectiveness of Materials
- Efficiency of Overall Session
- Extent to Which Trainees are Prepared to Perform Duties



Pilot Test the Training Program

- Recruiting and Registration
- Information Presentation and Orientation
- Practice and Feedback
- Graduation and Transition



Schedule Training Events

- Positive Statements
- Reminder of Objectives
- Tips and Suggestions for Improvement
- Availability of Support



Providing Feedback to Trainees & Staff

- Reasons

- Staff Performance
- New Tasks
- Feedback from Staff



Ongoing Evaluation & Revision

- Evaluation Methods and Tools
 - formal assessment of materials and activities
 - informal observation, unsolicited feedback



Ongoing Evaluation & Revision

- Constantly Stimulate and Challenge Staff
 - Provides motivation, or identifies staff resistance issues
- Tie Training to Expectation and Staff Evaluations
 - Provide “Catch-Up” Training
 - Digital Reference may Uncover unmet training goals from the last big training event, the Internet
- Tying Training to Management
 - Use Training to Cross Boundaries
 - Paraprofessionals, Technology, Subject Areas



Tying Training to Management

- Integrate Digital Reference with Other Reference Activities
 - Face-to-Face Reference
 - Web Design
 - Metadata Creation
 - Prevent the “Only Questions” Resistance Rut
- Wherever Ethically possible share transcripts openly throughout the reference staff
 - Drives Quality



Other Management Scars