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.
KEYWORDS: digital reference, virtual reference, pre-conference, management
Personnel Management and Training for Digital Reference Services

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• Don’t Let it Throw You:
  – K-12 Language
  – AskA Language
  – Publication Date
• 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
Why A Training Program?

- New Skills
- New Technology
- New Policies - Consistency
- New Staff (local and remote)
### Who is Trained?

| Management | Instruction and resources on creating and maintaining digital reference services  
<table>
<thead>
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<tbody>
<tr>
<td><strong>Define Strategy</strong></td>
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</table>
| **Information Specialists** | Training on general issues in responding to digital reference inquiries  
| **Support Staff** | Training on day-to-day operations  
| | **Route questions**  
| | **Monitor responses**  
| | **Maintain service resources**  
| | **Answer questions** |
Training Plan Phases

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
Using Process to Define Goals

1. Open Message
2. Select "Reply" Command
3. Greet User by Name
4. Do you Know the Answer?
   - Yes: Type Answer and/or References in Response
   - No: Conduct Search
5. Answer Found?
   - Yes: Send Message
   - No: Refer User to Alternative Service or Source
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 Delivery Methods

- Web page
- E-mail
- Real-Time Communications
- Print-Based Materials
- Instructor-Led Presentation/Class
- One-on-One Mentoring
- Computer-Based Instruction
  - WebCT, Qarbon
<table>
<thead>
<tr>
<th>Delivery Tool</th>
<th>Present Information</th>
<th>Discussion</th>
<th>Practice</th>
<th>Feedback</th>
<th>Job Aids</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Web Pages</strong></td>
<td>✔</td>
<td></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Attractive Presentation Allows hyperlinks to basic and supplemental information.</td>
</tr>
<tr>
<td><strong>Instructor Lead</strong></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Handouts Good for introducing topics; must follow up with review and practice and feedback Can be done at conference</td>
</tr>
</tbody>
</table>
• Text-Based Only
• Text--Practice--Feedback
• Text--Shadow and Observation--Practice--Feedback
• In-Person Class--Text--Practice--Feedback
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?
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
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
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
• Recruiting and Registration
• Information Presentation and Orientation
• Practice and Feedback
• Graduation and Transition
• Positive Statements
• Reminder of Objectives
• Tips and Suggestions for Improvement
• Availability of Support
• Reasons
  – Staff Performance
  – New Tasks
  – Feedback from Staff
• Evaluation Methods and Tools
  – formal assessment of materials and activities
  – informal observation, unsolicited feedback
• 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
• 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