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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

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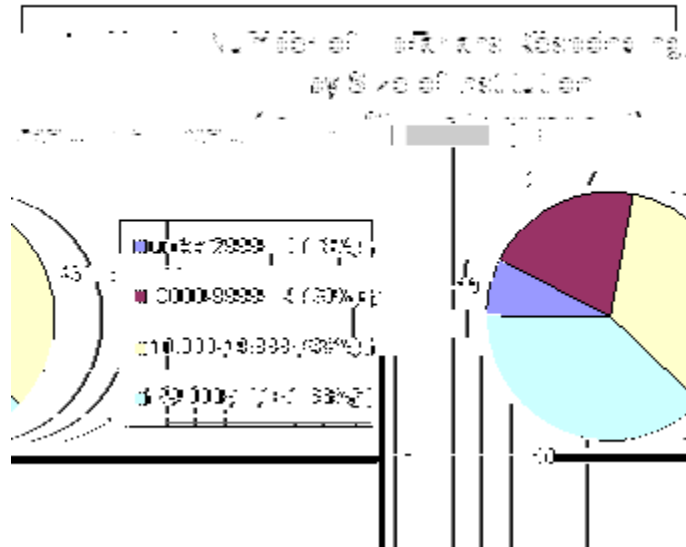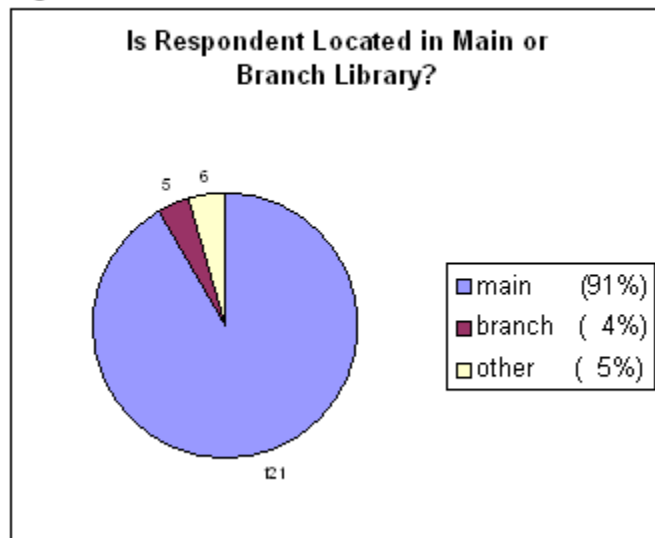
Figure 1



Figure 2



Is Respondent Located in Main or Branch Library?

- main (91%)
- branch ( 4%)
- other ( 5%)

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.

**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 hand72.0d8Qq0.00000912 0 612 792 re

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|---|---|---|
| **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-housedb positive recomm53F3 11.04 Tf1 0 0 1 144.8Qq.04 Tf1 0 0 1 2

> 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
> tions regarding each type.)

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**

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 erence. 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.

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

**Table of pros & cons**

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|---|---|---|
| **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 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 no 331.73 Tm011(si)5 |

| Formal course-work | "Essential for learning specialty resources in sub-areas of business" |
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