Published in final edited form as:

Ref Libr. 2015 ; 56(1): 59–66. doi:10.1080/02763877.2014.970118.

In-House Training on New Library Processes at the NIST Research Library: A Case Study

Marla Aizenshtat, Stacy Bruss, Catherine Wagner, and Briget Wynne

National Institute of Standards and Technology, Gaithersburg, MD

Introduction

The National Institute of Standards and Technology (NIST) Research Library is one of three programs in the Information Services Office (ISO) that supports the research efforts of the 3,000 scientists and engineers at the NIST campus located in Gaithersburg, Maryland. The ISO has a staff of 30 across the Research Library and Information Program (RLIP), the Electronic Information and Publications Program (EIPP), and the Museum and History Program. Staff include managerial, professional, technical, administrative, and technician support--all with varying tenures and skill sets.

Throughout fiscal year 2012 (FY 12), ISO embarked on a year-long study to explore innovative business models and alternatives to provide customers with research materials that are normally procured through traditional interlibrary loan (ILL). The intent was to meet customer information needs with “better, faster, cheaper” service. Such models included patron-driven acquisition through direct purchase from the publisher, purchase-on-demand transactions using tokens, and third-party outsourcing options through subscriptions and “big deal” packages. The study also examined the cost-effectiveness and return-on-investment of these access alternatives.

As a result of the study, new methods of providing service to users were established that included a mix of direct purchase, tokens, and a subscription to a new database. The new methods affected customer service at the reference desk, ILL processes, and procurement procedures.

Successful implementation of the new workflow and access methods relied on training the ISO staff directly affected by these forthcoming changes, as well as providing instruction to all staff members in ISO. To take advantage of the new access methods, training was planned for the first quarter of fiscal year 2013 (FY 13). The ISO Management Team created a short-term internal training team of four librarians to plan, create, and deliver the training program within the three-month timeframe. The primary goal was to provide all ISO staff with a clear understanding of the new workflow and its implementation. A second goal was to refresh the staff’s knowledge and use of existing library resources. With a full

understanding of the new and existing resources and access methods, ISO staff would efficiently meet customer information needs with “better, faster, cheaper” service.

This case study presents the experiences of the training team librarians as they overcame challenges and limited resources to deploy an in-house training program successfully.

Background

The team of four librarians evaluated the material to cover and created four distinct modules: Philosophy of Customer Service, Changes to the ILL Workflow, Searching Library Resources, and Alternate Access Options. Included in the refresher training were topics on the use of library tools such as the online public access catalog (OPAC) and Google Scholar.

The Philosophy of Customer Service module was used to kick off the training program. The team presented the class in two program staff meetings to reach all ISO staff, remind staff of the importance of providing excellent customer service, and provide context to the sets of classes to follow.

The second module of classes covered changes in the new ILL workflow. Reference desk staff received training in how to best assist customers with submitting complete ILL requests, reducing ILL processing time. Due to changes in ILL, alternative access to theses and patents were also taught.

The third module was a series of refresher classes on existing external databases such as Web of Science, Engineering Village, IEEE Xplore, Google Scholar, and ScienceDirect and internal databases such as the OPAC. The fourth and final training module was a series of classes on new products that included EBSCOhost, tokens, and purchase-on-demand.

At this same time, the library was implementing new methods to access and acquire e-content that would affect everyone from librarians, to front-line technicians, and even back-room technical services staff. The new methods needed to be implemented consistently by everyone to avoid duplication of services, create cost savings, and provide faster service to customers. The new methods were also potentially confusing to our customers, so we wanted all staff to provide a consistent message on the new processes and policies.

Planning

Planning, creating, and delivering training in a limited amount of time was a significant challenge. The new processes were library-specific and an outside trainer was not an option to communicate most of the content, such as new purchase-on-demand procedures and changes to how the library would handle requests for theses, technical reports, and patents. While there are many training options for commercially available databases used by the library, the team determined that the short timeframe would make bringing in vendors for training sessions difficult, and wanted a more hands-on approach than using free webinars and videos provided on vendor websites. Despite the short timeframe and limited resources,

the team developed an innovative and ultimately successful strategy to meet these challenges and complete the project on time.

The team met frequently during the first few weeks to strategize how to develop classes, provide instruction, divide responsibilities, and use existing library resources. The team used in-house materials, software, and staff expertise to develop and deliver the training classes. ISO Management requested that some classes be mandatory while all other classes be optional for everyone. Taking the time to strategize, review resource options, and plan a delivery schedule before developing actual course materials helped the team keep on track, create a manageable training program, and deliver it within the given period.

The team reviewed the training topics and decided to divide the content of the four modules into ten classes, which would be developed and taught over the three-month period. Combining the classes into four modules allowed the team to focus on a small number of classes for creating content, scheduling classes, signing up students, and delivering courses without becoming overwhelmed. As one module was completed and taught, the team would begin to work on the subsequent module. To meet the training deadline, the team used a rapid cycle where classes were simultaneously developed and delivered one module at a time. Students completed all classes of one module before moving onto the next module. Figure 1 shows a Gantt project planning chart to illustrate these concurrent activities.

The sequence in which students took classes was important to allow them to see how each new process related to each other and where it fit into the new workflow as a whole. Some classes served as pre-requisites, establishing a framework for concepts introduced in future classes. For example, a major change was the need for customers to complete their citations before entering requests into the ILL system. The class on how to find complete citations came after the class explaining why this process was changed. The class on changes to the ILL workflow set the foundation for the subsequent classes on alternative access methods.

Other classes covered new library processes, and the instructor created course content at the same time the new processes were developed or purchased. This challenge influenced the class schedule, as those classes needed to fall at the end of the series. For example, the library purchased tokens to buy articles-on-demand, but they were not available until several weeks into the training program. The purchase-on-demand policy was not finalized until the end of the three-month training period, so those classes were taught at the end of the cycle to allow time for the instructor to create the class once there was a policy and process to teach. The database and searching classes did not need to fit in any order or sequence.

Logistics

To create and teach the classes on schedule, the team divided responsibility for leading the development of each class to a single team member. The team selected the class instructor according to individual skills, areas of expertise, and availability. The instructor managed the entire life cycle of the class.

Topic areas were selected for each class and teaching objectives were developed. Based on those objectives, the instructor created all of the content for the class, including course

materials, presentations, handouts, and hands-on exercises. The instructor also guided the training content through the internal ISO Management review process and delivered the class to staff, ensuring that all required attendees had the opportunity to attend a session. For the most part, a training team member was the instructor for the class. However, in some instances where the training team recruited other ISO colleagues to create and instruct the class due to their unique skill set. Before delivering training, instructors presented a dry run to the training team, which served as an initial review and opportunity for synchronous critique from all team members.

Each class then proceeded through the formal internal ISO review process, which included review by each of the three ISO managers; this vetting process ensures a consistent standard of product coming out of ISO and compliance with an internal style guide. An underlying critical step in the team's success was ISO Management support; by actively participating during class development, adjusting team member workloads to provide members time to plan the classes, and expediting their review of the training products to keep the program on track, ISO Management conveyed the importance of the project to the organization.

The method of dividing the classes into modules and assigning an instructor to oversee class development avoided overwhelming any of the team members and contributed to the success in delivering the program on time.

Success Indicators

The team's mission was successful due to several factors including small class size, instruction techniques, and the use of existing resources. The responses on a course evaluation survey from staff confirmed that the team met its goals. ISO Management attended most sessions and was equally pleased with the content and delivery of the training and incorporation of the new processes into the daily activities of ISO.

The first indication of training success was that the students were comfortable learning new material. Small classes created an inviting setting for attendees, permitting participants to feel comfortable asking questions, engaging in discussions, and helping each other learn the session's objectives. Training sessions were limited to an hour, with 45 minutes of instruction and time for questions and hands-on assistance. Limiting class size to four participants, each with his or her own laptop, allowed attendees to follow along with the instructor during the session.

The second indication of training success was that the students were engaged during the training sessions. Instructional techniques included icebreaker activities and reinforcement of key concepts, which contributed to the overall engagement of students. Each lesson began with a five-minute warm-up or icebreaker exercise to introduce the learning objectives and involve participants in the forthcoming instruction. In the first class, Philosophy of Customer Service, attendees received index cards to write down a word or phrase describing what customer service means to them. Some students shared what they wrote, which led into a discussion about customer service and how the new changes will support ISO's customer service values. Another exercise, for the Google Scholar search class, quizzed attendees on what scholarly literature Google Scholar indexes. These icebreaker exercises fostered

discussion, helped students engage with the material, and contributed to a positive atmosphere that allowed the students to feel comfortable in the instructional setting.

Additional indicators of success included the participants' enthusiasm about what they learned and eagerness to attend future sessions. The team received feedback through a survey distributed after all the classes, as well as through informal conversations with staff about the program. The survey had a response rate of 64% with 18 out of 28 participants responding. The results of the survey also indicated that the attendees immediately applied what they learned to their daily tasks and ongoing responsibilities. Qualitative observations of the new processes a few months after the completion of the program suggest that participants have adopted them with little or no additional training needed.

Lessons Learned

Without a precedent to build on, the team developed and delivered training classes for all ISO staff. In the process, it discovered many areas for improvement for future training endeavors. One such area disclosed by the survey was the scheduling of classes, specifically the registration process. Initially, the registration process was paper-based. Suggestions from staff led to creation of a calendar of classes on the ISO SharePoint site that attendees used to sign up online. The online calendar allowed staff to simultaneously check and mark their calendars to ensure they were selecting a time that fit with their schedules.

Experience levels of staff were different because of varying roles in the library or their professional tenure. To meet the needs of all levels, the instructor needed to consider the experience levels of all potential attendees. While offering classes by experience level would have been preferred, the speed of the development cycle did not allow it.

The team realized that it would have been useful to solicit feedback with a short evaluation form at the end of each class or module to get more immediate feedback so that the team could have applied feedback promptly to adjust future courses. The survey at the end of the training program provided valuable feedback for future training. There were suggestions for providing handouts in all sessions for use as a reference guide or when working with customers. In addition, there was a request to create more online training content to meet the needs of telecommuting staff.

Additional Readings

A comprehensive in-house training program of this scale and complexity was a new initiative for ISO. The following articles provided techniques, case studies, and tips that provided insight into the experiences of other libraries that the team used to shape their in-house training program. ISO is a large Federal library; although much of the published literature focuses on the efforts of academic libraries, valuable information was gleaned. For example, a 2010 case study described the development of a staff training program for a new Information Commons at the University of Arizona (Sult & Evangeliste, 2009). This article discusses the need for development of multiple training modules, approaches to instructional development, and scheduling challenges. The team implemented the concept of multiple

training modules and some of the approaches to instructional development found in this article.

Although several years old, many of the tips presented by Epple (1992) were applicable. Suggestions such as offering a variety of training settings, relevancy of sessions, and pretesting (or a dry-run) were implemented and proved to be valuable to the success of the training program. Jennerich (2006) also outlined several key positive points such as enhancing staff experience, customer service improvement, and providing staff with problem-solving tools are all results of effective training for internal staff, which the team used in garnering support for its training program.

Conclusion

ISO determined that developing in-house training and relying on current staff expertise to design and implement the program was the most viable solution for helping staff become proficient with new products and procedures for library services. The lessons learned in the process are useful in guiding future endeavors to create training programs for ISO staff. In addition, the training classes can be updated for new staff. By leveraging available expertise of colleagues, being creative with available resources, and through the support of ISO management, the team was successful despite the challenges. With limited resources, the team created a well-received, effective training program that had positive impact on customer service and staff involvement.

References

- Epple M. Staff training and automated systems: 20 tips for success. *Journal of Academic Librarianship*. 1992; 18(2):87–89.
- Jennerich EZ. The long-term view of library staff development: The positive effects on a large organization. *College & Research Libraries News*. 2006; 67(10):612–614.
- Sult L, Evangeliste M. We are all librarians: training in the ever evolving information commons. *The Reference Librarian*. 2009; 50(3):248–258. doi:10.1080/02763870902947141.

Figure 1.
Portion of team's Gantt project planning chart