

# Our situation

Private liberal arts college library

2211 undergraduates (fall 2022)

19 library staff: 5 Access Services, 8 liaisons

~25 student workers who staff desk 8 a.m.–12 a.m. most days

This program works well for us, but depending on your situation, your mileage may vary!

## Current referral training

Occurs around fourth week of overall training program for new hires and consists of:

30-minute meeting with librarian A: get acquainted, learn about librarians and referrals

30-minute meeting with librarian B: think aloud through a set of real questions to answer or refer

### 30-minute meeting with librarian A

Learning outcomes:

1. Librarians and trainees will get to know one another in order to have face/name recognition and a better appreciation for the roles we play in the organization.
2. Trainees will become familiar with the library subject guides as a tool for steering students towards subject-appropriate library resources.
3. Trainees will become familiar with the liaison program in order to make more useful referrals and to highlight the research consultation as a key library service.
4. Trainees will learn the value of referrals and also to recognize when questions need to be referred to librarians in order to make sure library patrons are receiving the highest possible service.

### 30-minute meeting with librarian B

Procedure:

1. Librarian and student introduce themselves.
2. Student fills out [Google Form](#) received at beginning of meeting, explaining to the librarian their reasoning for choosing to answer or refer a question.
3. After student has submitted form, librarian and student look at the answer key and talk through questions where the student's response doesn't align with preferred answer.
4. Student has opportunity to ask questions.

5. Librarian shares any observations about patterns, words of encouragement, etc.
6. Student automatically receives copy of form with answer key feedback to review later if desired.

Developing a form:

1. Generate a list of real or representative questions that require different responses from student staff (answer, refer). Start with more than you expect to use.
2. Indicate responses hoped for. In our case, collaborating across departments was key to developing a tool that we both felt high confidence in; we independently marked how we hoped students would respond, and then compared and discussed our answers. For most questions, we were in agreement about how the student should respond; in several cases, we were both comfortable allowing two acceptable answers. If we had encountered questions where our positions were irreconcilable, we would have eliminated those questions from further consideration: the goal was to have relatively clean examples that wouldn't unnecessarily muddle the issue for a student new to reference and referrals.
3. Select final questions that give students exposure to different preferred response conditions (answer, refer to first available, refer to specific librarian). For a half-hour meeting, we've found that 13 questions is just about perfect, distributed as follows:
  - a. Answer myself: 4
  - b. Refer to a specific librarian: 3
  - c. Refer to first-available full-time staff member: 4
  - d. Answer myself OR refer to first-available: 2
4. Transfer questions into form and code answer key with responses.