

CDCC/CIS/82/8

16 July 1982

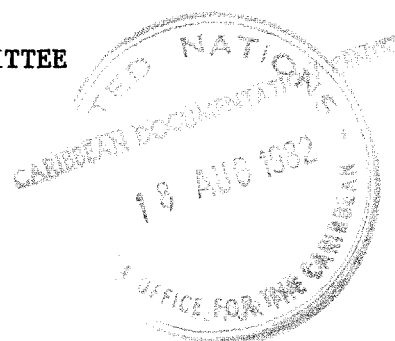
ECONOMIC COMMISSION FOR LATIN AMERICA
Sub-regional Office for the Caribbean

CARIBBEAN DEVELOPMENT AND CO-OPERATION COMMITTEE

Workshop on User Education Techniques
for Use in Special Libraries

Mona, Jamaica

19 - 23 July 1982



BIBLIOGRAPHIC INSTRUCTION
IN USER EDUCATION

Convened by the Caribbean Development and Co-operation Committee Secretariat (CDCC), U.N. Economic Commission for Latin America, Sub-regional Office for the Caribbean, under the sponsorship of the University of the West Indies Department of Library Studies and the International Development Research Centre (IDRC).



UNITED NATIONS

ECONOMIC COMMISSION FOR LATIN AMERICA Office for the Caribbean

Definition

A range of phrases exist to identify instructions in library skills to users including the term 'bibliographic instruction' which in North America is usually co-extensive with 'user education'. For the purposes of this paper, I prefer the narrower meaning of 'bibliographic instruction' as defined by Ian Malley when he distinguishes between library orientation:

- "a process whereby the library user is made aware of the extent and number of the library's resources, of its services and of the information sources available to him or her"

and bibliographic instruction:

- "(a process whereby the user) is taught how to use these resources, services and sources". (1)

To this may be added:

- to increase the user's ability to use these resources independently.

The session of orientation later today will outline various ways to engage the attention of potential and current users. The follow through by bibliographic instruction does not imply that the two activities are exclusive but rather form links along a continuum in user education.

Goals

Evans et al (2) list the broad objectives of a programme of information retrieval and library use as:

- understanding the value of information;
- recognizing information needs;
- knowledge of the principal sources of information;
- knowledge that recorded information has limitations and obstacles;
- appreciation of finding tools;
- appreciation of search techniques;

- ability to locate introductory publications;
- ability to locate other literature and information.

From this general list the librarian must establish her own goals in relation to local conditions within feasible limits.

Special libraries setting

Special libraries usually operate in a mission-oriented organization and most of the librarians present would agree with the following generalizations:

- that users view information-gathering as within the province of the duties of the librarian/information officer,
- that users are reluctant to spare time on the job to undertake lengthy bibliographic searching or to acquire library skills, and
- users perceive the library as a small part (or non-part) of their universe of information.

Consequently, the special librarian, in acknowledging the necessity to attract the relatively high numbers of potential users who function without the assistance of the information units, must adopt different approaches from the well-documented programmes in academic institutions. There, motivation/enforcement mechanisms exist to ensure 'captive' audiences for sessions scheduled by the libraries.

In special libraries, a structural arrangement such as this is not viable. Again, users' experience is often limited and expectations have to be heightened by the librarian.

Individualised attention is the decisive factor in the success of a programme.

Target groups

Target groups within the organization should be identified and processed in different ways.

This paper concentrates on the professionals

- who would comprise the majority of users of the information system, and
- whom it would be least likely to convene as a group for teaching purposes.

Support and administrative staff (secretaries, legal staff, accountants) may be more easily brought together for a library briefing. In addition, their information needs are on the whole less demanding. For this group, library exercises and workbooks may be devised concentrating on each sub-group's peculiar needs.

Methods

Several options may be combined in the librarian's plan for executing bibliographic instruction.

1. Individualized approach

The most pragmatic approach, in my opinion, is an impromptu (but well-rehearsed) 'lesson' where the means for solving a problem can be taught in a real-life situation rather than as an academic exercise. In other words, if a user presents a query the librarian should, on opportune occasions, seize the chance to explain the use of a reference tool or perhaps the means to track down desired information.

Be brief and, pray, do not attempt this method if the user is working against a deadline.

2. Conceptual frameworks

The librarian's preconceived notions of what should be taught do not always coincide with those of the users. Furthermore, concepts transmitted to learners in a vacuum serve little purpose. An article by Kobelski and Reichel (3) stresses that conceptual frameworks are crucial in imparting bibliographic information. An interpretation of this article is included as the Appendix.

Several frameworks are provided for presenting information in a meaningful way to users and includes systematic literature searching which is dealt with later.

3. Indirect means

Current awareness bulletins and Selective Dissemination of Information (SDI) carry their built-in means of bibliographic instruction in the form of introductory notes.

Careful preparation to ensure clarity is vital. A user may never enter the information centre but regularly-circulated awareness bulletins establish somewhat tenuous contact with the user.

An initial visit to explain the scope and arrangement of these journals to new members of staff may spark interest in the library.

4. Communication skills

The librarian should perceive of herself as a teacher and attempt to maintain a balance between bibliographic expertise (avoid library-oriented jargon and the urge to disseminate much descriptive detail) and communication and teaching skills. The latter will play a key role in fostering receptivity to ideas so I recommend:

- (a) development of ability to communicate clearly and effectively,
- (b) enthusiasm and helpfulness,
- (c) patience in relaying routine facts and processes repeatedly,
- (d) constant evaluation and improvement of teaching skills.

5. Courses

Formal courses are mentioned last as I think them the least likely (though I do not question their validity in certain circumstances) to succeed in the special library milieu; in any case, the time frame allotted to this paper would not afford adequate treatment of the subject.

I refer participants to an excellent guide which contains sections geared to social scientists and to persons working at the level of practitioner: Education and training of users of scientific and technical information: UNISIST guide for teachers. Paris: Unesco, 1977. It includes details of course content, sample lectures and exercises for a wide variety of learners.

Tools

A menu of possible aids, which need not be elaborate concoctions, is offered; selection will depend on time and financial resources available as well as the identified needs of your clientele.

1. Point-of-use aids

Written instructions or tape/slide or audio presentations explaining how to use specific resources, for example, abstracting and indexing journals, the catalogue, reference books, and placed near the point of actual need are very effective. The information is always available, the memory of the infrequent user is revived and the librarian's time is saved.

Judicious selection of relevant points and the omission of finer details are imperative if the guides are to be successful. If at all possible represent instructions by graphic means.

Point-of-use aids are passive tools as they do not instill search strategy in the user's mind and the librarian cannot evaluate its effectiveness in most cases.

2. Bibliographies

In a special library, the listing of sources pertinent to a particular subject becomes dated at the moment of publication. Moreover, a basic bibliography might be most useful in providing background reading in an unfamiliar area if peripheral interest to the user. To be helpful, it must be annotated as frequently, the user must make a choice.

Bibliographies are time-consuming to prepare and require constant revision.

3. Topical guides/Pathfinders

Library Pathfinders were originally developed by Project INTREX at the Massachusetts Institute of Technology.

An appealing tool, it embodies search strategy as well as a seminal, rather than exhaustive bibliography in its format. The design of the guides combines research techniques and library resources. They explain how to locate information on a particular subject by highlighting types and purposes of particular reference tools and also cites specific titles.

A series of locally-created Pathfinders can be a logical step-by-step introduction to bibliographic search strategy which leaves the user free to progress at his own pace and once again, saves the time of the librarian.

Literature search techniques (See handout)

Structure of guides

The following elements of a topical guide are drawn from Renford's Bibliographic instruction (4) :

(a) Definition or scope of guide

Specialized terms should be explained and the topic defined.

(b) Introduction

Preferably a single item, for example, an encyclopaedia article, which gives a concise overview of the topic.

(c) Catalogue

Descriptors or subject headings likely to generate relevant information. A list of preferred terms is useful.

(d) Books

Choosing a half-dozen monographs from one's collection does not mean that these are best available. This section must be updated as new publications supersede items in stock.

(e) Reference

Specialized handbooks, directories, manuals, etc.

(f) Bibliographies

Based on library's collection.

(g) Periodical indexes

Only those listing material specific to the topic should be noted. A helpful feature is the listing of descriptors peculiar to each index.

(h) Proceedings, reports, documents

Probably most useful source of detailed information.

Not all sections of the above guidelines need to be included. Sensitivity to the user's needs, current important issues and the resources at hand should mould the character of your Pathfinders.

Presentation

Printed guides should be:

- concise
- accurate (misleading information will effectively destroy the library's credibility rating)
- attractively designed (colour, properly designed and executed graphics should be employed)
- simple to use (format should be simple, uncluttered)
- current (new editions, subject descriptors, a change of location in the library, recently-introduced sources mean a fresh guide)

On-line information systems

In discussing this facet of bibliographic instruction, several factors should be borne in mind:

- (a) most commercial sources package their own instructional materials and maintain a marketing staff to arrange on-the-spot demonstrations,
- (b) in general, the librarian is accepted as the intermediary between the computerized services and the end user, a position which will be strengthened as automated services increase in complexity and numbers, and
- (c) on-line information systems are at present at an undeveloped stage in the Caribbean region.

Thus, to paraphrase an earlier paper, the aim of user education relating to on-line systems should be to make the end user cognizant of:

- the existence of data bases which record, index and abstract specialized information,
- the subject areas and depth of coverage of data bases relevant to the user,
- types of material included,
- the terminological base (thesauri, etc.) of the data bases,
- basic search strategy,
- the comparative advantages and costs of manual, on-line and off-line searching.

Conclusion

Given the foregoing, I suggest that librarians in special libraries set realistic goals for any planned user education programme aimed not at producing users proficient in library skills but:

- an increasing awareness of the information sources available in and via the library,

- a degree of familiarity with the techniques to access these resources,
- a positive attitude to the value of information in enhancing his decision-making,
- reasonable confidence and precision in formulating his future requests to the library.

Furthermore, it is my opinion that the librarian should plan a programme of options which instruct, prepare support materials but interact with the user as the opportunity arises rather than as a formal teaching exercise.

Finally, I close with a lengthy quotation by Carole Ganz:

"user education must involve ... commitment on the part of the information community to respond to user requirements. User education initiatives, if successful, are going to create expectations that services will solve users' problems, meet their needs, improve their productivity and reduce their investments of time and effort. Unless services exist or can be developed that are effective in meeting the upgraded demands of trained, knowledgeable users, the credibility of the information community, the willingness of users to pay for services, and the development of new institutional arrangements able to utilize currently existing information resources, will decline." (5)

User education is not an end in itself.

R E F E R E N C E S

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