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ABSTRACT. Develops a model for library staff training program for business reference. The program identifies core business reference competencies for library staff and uses performance measure standards to meet Reference and User Services Association guidelines. Provides training program that offers insight to the information-seeking habits of business students, general knowledge of the business discipline and assistance in identifying appropriate library resources. Covers all aspects of establishing a training program including planning, implementation and assessment. Effective training programs covering business and other disciplines provide library staff an opportunity for professional development and gives the library an avenue to improve the quality of reference assistance.

Getting Down to Business: Library Staff Training

<u>Introduction</u>

Working at the reference desk, library staff must answer questions from multiple disciplines. Among the most difficult to answer are questions related to business. Unless they have had prior experience with business resources, some librarians do not feel comfortable assisting patrons with business inquiries. Due to the fact that business reference can be an intimidating area, developing and implementing a training program is very important. It is vital that library staff feel comfortable dealing with business students, faculty and patrons.

Upon arriving at the University of Nevada, Las Vegas (UNLV), the author was asked to create a business reference training program for twenty-nine library staff members who provide assistance at two reference desks at Lied Library. At the time, library staff acknowledged that they did not have sufficient training to answer certain business inquiries. The training program was created to teach library staff core competencies in business research. The core competencies included knowledge of business resources, including key publishers and content, organization of business resources and types of business information. The training program was also created to ensure library staff meet Reference & User Services Association (RUSA) professional competencies for reference and user services as it relates to business reference (Reference & User Services Association, 2003). This article discusses the planning, implementation and assessment of the training program.

<u>Literature Review</u>

Performing a literature review, there has been one article specifically written on

business reference training. The article on library staff training in business was written from a public library perspective. In his 2000 article, Wilkins describes a business reference training program at the Orange County Library System in Orlando, Florida. Wilkins states that "business-oriented reference questions, particularly in public libraries, can occupy a third or more of the reference staff's attention." Wilkins describes the training program where library staff benefit from focused orientation to business patrons and characteristics of their questions.

When looking at other reference training articles, most reference-related research describes basic training programs for new or current library staff. Dankert and Dempsey (2002) describe a reference training program for library staff using peer training. Spang (1996) discusses a staff-generated cross-training plan using a total quality management approach. Although these programs are very comprehensive, they do not adequately cover detailed training in various disciplines, including business.

As far as business-related literature, most articles discuss the information-seeking behavior of business students or information literacy. Although these articles do not specifically describe a business training program, they include many relevant issues applicable to business reference. These issues should be addressed in any business reference training. The first issue concerns the difficulty of business reference. Business reference is very intimidating for many librarians and library staff. As Wilkins states "learning business reference is similar to learning a foreign language." What makes business reference so intimidating is that "most librarians come from liberal arts backgrounds" (Wilkins, 2000). Another issue in business reference training is the "typical" business student and their information-seeking habits. Business students are

more demanding, time-sensitive and carry high expectations about the result of the library visit regardless of their individual fluency with libraries (Wilkins, 2000). Business students prefer electronic resources, exhibit traits of urgency, and have a utility of immediacy with their assignments (Atkinson & Figueroa, 1997). Business patrons "tend to have immediate, urgent questions" (Lavin, 1995). In addition to information-seeking habits, the characteristics of business questions can be problematic. Some business information is proprietary and carefully guarded by the company. Because of this, some business questions are not easily answered (Lavin, 1995). Finally, business resources themselves can make answering a business reference question difficult. Business resources are overabundant, diverse and specialized. This causes published business information to be fragmented (Lavin, 1995). "The combination of demand for currency, data intensive materials and multiple formats has given a rise to a distinct type of library service. Users generally require guidance and assistance in identifying and applying it to their particular information needs. A single research strategy rarely exists that predictably answers all questions" (Diamond, 1996).

UNLV Libraries

The UNLV Libraries serves a population of close to 24,000 students, including over 17,000 full-time students, academically located in fourteen colleges, one of which is the College of Business. The College of Business is divided into six departments: Accounting, Economics, Finance, Management, Management Information Science and Marketing. Currently, the College of Business has the second largest undergraduate population and is the third largest College, with over 2,200 full-time student enrollment.

This figure includes undergraduate, graduate and doctoral students. In the past few years, the College of Business has experienced rapid growth and is expanding its graduate and doctorate programs. In the past two years, the College of Business has experienced a growth rate of 12.8% and 11.9%. Due to the increase in growth, UNLV Libraries has experienced an increase in business questions at both reference desks.

The increase in growth of the business student population, combined with the fact that library staff had not received training in business resources, exhibited the need for a formal business reference training program. In addition, library staff had requested that there be some sort of training, whether formal or informal. Library staff were comfortable helping business students locate certain items, such as journal articles, but were not as confident when answering more detailed questions, like industry information. The general consensus among the reference staff was that the business student population was not receiving high quality reference service due to lack of training.

Training Program

Establishing a training program is a time-consuming process and involves several stages. These stages included planning, organization, implementation and assessment.

Planning

In the planning stage, the goals for the program are identified. Once the goals are determined, the next step is to identify options to achieve the goals. In order to achieve each goal, certain strategies must be used. For this specific training program, two goals were identified:

Goal 1. Improve the library staff's ability to answer basic business reference questions.

The emphasis for this goal was placed on increasing the general knowledge of business reference for library staff. Due to the fact that library staff must answer reference questions from a variety of disciplines, it is impossible to expect staff to have in-depth knowledge in every area.

To achieve the first goal, the strategy involved compiling a list of core competencies for business reference. After the training program, each library staff member should have acquired a set of skills related to a general knowledge of business reference. The core competencies included:

- **Knowledge of common business assignments**

What is the exact nature of the assignment? For many assignments, students must piece together various parts of information and provide a detailed analysis on a company, industry or market. Knowledge of common business assignments allows each staff member to be prepared in advance for many potential business reference inquiries.

- **Understanding the various types of information needed by business students**

What type of information will the student require for the assignment? Explaining the type of information the student will require is essential. The type of information is beneficial to library staff because it allows them to gain more knowledge about business as a subject. Having a basic understanding of the business discipline helps library staff feel more comfortable and increases their ability to assist patrons. This competency is also valuable in assisting library staff in choosing the appropriate business resource.

- **Knowledge of basic business terminology**

Learning common business terms is extremely important to the reference transaction. Having basic knowledge of business terms allows the library staff to effectively communicate with the business patron and efficiently conduct the reference interview. Business terms are also useful when searching library resources.

- **Knowledge of "core" business resources including content, organization and searching capabilities**

Once the needs of the patron are identified, library staff must choose the appropriate

resource. It is vital that library staff have in-depth knowledge concerning the content of the resource. In order to effectively search library resources, library staff need to understand how each resource is organized and what search capabilities are available.

Goal 2. Improve the level of reference assistance to library patrons asking business related questions.

The second goal was to improve the level of reference assistance to library patrons. In order to meet the second goal, it was decided that library staff should be able to meet basic reference competencies when answering business questions. In order to establish these competencies, some professional standards needed to be identified. In the research process, two guidelines created by RUSA were chosen. The first guideline is the *Professional Competencies for Reference and User Services Librarians* created by the RUSA Task Force on Professional Competencies. Specifically, the concepts of access and knowledge base were chosen. Access involves "understanding information needs and information behavior of primary users and developing the skills to effectively meet those information needs (RUSA, 2003)." The knowledge base pertains to the knowledge of basic information tools, including databases and Internet sites (RUSA, 2003). The second benchmark used was the *Guidelines for Behavioral Performance of Reference and Information Services Professionals* (RUSA, 1996). At the end of the training session, library staff should have a high level of skill in business reference related to Guideline 4.0, Searching. Library staff should be able to identify sources appropriate to the patrons need that have the highest probability of containing information relevant to the patron's inquiry (RUSA, 1996). The staff should also be able to discuss the search strategy with the patron and work with the patron to narrow or broaden a topic when too little or too much information is identified (RUSA, 1996).

<u>Information-Gathering</u>

Before starting the training program, it was necessary to gain more knowledge on the types of business questions being asked at both reference desks. Several methods were used to gather this information. First, library staff compiled a list of business reference questions asked at both reference desks. Next, library staff were interviewed about their experiences working with business students. Third, when a reference question was referred to the author, the type of question was documented. Finally, through marketing efforts, business faculty were asked to submit information about the types of assignments students would be asked to complete. Most faculty either explained each assignment or provided a copy of the class assignment. All of these efforts provided a sound background for identifying possible information requests by business patrons. The information-gathering analysis identified three main areas of need: locating company information (domestic), industry information and market research.

Organizing and Implementation

Once the planning stage was complete, the next stage involved organizing and implementing the program. The decision was reached to create three separate training workshops covering each topic. Each workshop would be one and a half hours in length and would be offered three separate times during the week. Offering each session on three different days allowed all staff to participate, while still covering the two reference desks. The workshops were held in one of the computer classrooms in the Teaching and Learning Center at the Library. The computer classroom was chosen to allow "hands-on" experience for training.

<u>Course Design</u>

The design of the workshops must be organize to meet each goal of the program. In this case, the workshops were designed to incorporate a set of business competencies and demonstrate how they relate to reference transactions.

Workshops

Each workshop was organized in the following manner:

Introduction: this section provided a background on each specific assignment, including a definition of the exact nature of the assignment and the types of information needed to complete the assignment. The introduction also included a discussion on basic business terminology. One example of business terminology used is SEC filings. A student may need to locate a specific report filed by a company with the Securities and Exchange Commission, e.g. an annual report or 10K.

PowerPoint Presentation: a PowerPoint demonstration was developed to highlight each specific type of information needed to complete the assignment. For example, when looking for company information, students might need a company history or list of directors. Library staff received handouts for this section of the presentation.

Library Resources: for each workshop, library staff were given a list of appropriate business resources, including print, electronic and Internet resources. There were two criteria used to select library resources. The first criteria used was comparing the list of resources provided by the Business Reference and Services Section (BRASS) Business Reference Competencies to the holdings of UNLV Libraries. The BRASS competencies is not a list of skills, but a list of resources that may be used to answer specific business questions. The list of competencies is a great place to locate relevant

resources related to business. The second criteria involved analyzing the content of each

resource owned by UNLV Libraries. The content was analyzed for depth of information

and for the number of potential questions the resource could answer. As a result of this

analysis, two levels of business resources were identified. The first level of resources

pertain to a set of "Tier I" business resources. The Tier I resources allow the library staff

to answer multiple questions related to a topic. Tier II resources allow staff to answer

only one type of question. For each workshop, a set of relevant Tier I and Tier II

resources were selected. During the workshop, the main focus was placed upon Tier I

resources because of their ability to answer several questions.

Bibliographic Instruction: this part of the presentation provided actual

instruction on how to use "Tier I" business resources. The instruction session included a

brief overview of the resource and searching capabilities. At the end of each instruction

session, staff had "hands-on" time to use of the resources.

Homework: A set of homework questions was assigned to provide additional

practice in using business resources and to increase the comfort level of library staff with

answering business questions. The set of homework questions is available in Appendix I.

Help: for each workshop, an online subject guide of electronic and Internet

resources was created. The online subject guides were placed on the business subject

page for easy access. The subject guides were a great starting point for both library staff

and patrons (Appendix II).

Types of Workshops

Company Information

The first workshop involved training on company information. The majority of

business reference questions are inquiries about companies. The workshop began with a discussion on the distinction between public and private companies and independent or affiliated companies. This designation is extremely important in business research, especially for students. Library staff and business students need to understand that when it comes to business resources, there is a lot more information available about publicly-held companies compared to private companies. The discussion moved to the topic of identifying a company as a "parent" company or subsidiary. Ownership of a company is important for locating information. If a company is a subsidiary of another company, the information is likely associated with the parent company. Next, specific topics related to company information were addressed. These topics included company history, financials, SEC filings, stock information, company products, company rankings and company philanthropy. In the area of SEC filings, the discussion focused on two types of filings, the Annual Report and the 10-K, which is an annual report filed 90 days after the end of a company's fiscal year. These two SEC filings were chosen because of the depth of information covered in each report. For each topic, two or three Tier II resources, both print and electronic, were demonstrated. In addition, four products that are considered "core" resources were identified (Appendix III).

Industry Information

The second workshop involved training on industry information and began with a discussion about the organization of industry information in business resources. Business resources are not consistent in the way they present industry information. Some resources have their own "classification" system and organize information in more broad industry areas, while other resources use either the Standard Industrial Classification

(SIC) or North American Industry Classification System (NAICS) or both. Due to the fact that business resources have organizational differences, there was an emphasis on compiling a list of keyword terms. For example, if someone is looking for information on the beer industry, the person should create a list of alternative keywords such as "alcoholic beverages" or " brewing industry." To address the issue of the SIC and NAICS classifications, each classification system was defined and analyzed. The author explained how the SIC system was developed by the U.S government to organize businesses by their primary activities. The author also explained the NAICS system and how it was created by the governments of the United States, Mexico and Canada to provide new comparability in statistics about business activity across North America. Staff were also informed of the fact that the NAICS system is replacing the SIC classifications.

After discussing keyword and classification systems, the types of industry information needed by students were identified. Industry topics included industry snapshots, industry statistics, financial ratios, and industry rankings. When discussing industry statistics, there was a segment on the importance of trade associations and regulatory agencies. Trade associations and regulatory agencies compile a vast amount of statistics and other information that may not be readily available in other resources. Trade associations also produce industry-specific publications, such as trade magazines and journals. For each industry topic, Tier I and Tier II resources were described. The list of resources for this workshop is available in Appendix IV.

Market Research

The final training workshop involved market research. The beginning of the

workshop involved a discussion on identifying key terms in market research. Next, there was a discussion of the types of information needed to perform a market research project. The types of information included demographics (local, national and international), consumer spending, and market share. The training program placed an emphasis on demographic resources. Who are the potential customers? What are their consumption behaviors? What are their buying habits? In addition to market research, this workshop also discussed advertising. With advertising, the emphasis was placed on spending and format. How much money do certain companies spend on advertising? What formats (print, Internet, television, radio) do companies use to advertise their message? The list of resources for this workshop is available in Appendix V.

Assessment

The final phase of the training program involved assessment. Assessment is extremely important to ensure that the training program meets all of its goals. The training program was assessed in two ways. First, after each session, library staff were assigned homework questions that mirrored research assignments in business classes. For each session, library staff were provided five questions to answer using various print, electronic and Internet resources discussed during the workshop. Staff were given two weeks to answer each set of questions. Homework assignments were placed on the UNLV Libraries network shared drive for easy access. In addition, the library staff received homework assignments throughout the semester to keep their knowledge base up-to-date. Second, library staff were given a survey to further assess the workshops and to provide staff with a vehicle to provide feedback on ways to improve the training program (Appendix VI).

Future Considerations

The business training program described is an ongoing project. Although library staff received training on the three of the most often asked business questions, there are many more areas of business reference that need to be covered. Future workshops include investing (stocks, bonds, futures, etc.), small business and international business. Workshops will also be scheduled for new librarians and staff as needed. Additional workshops will also be necessary as new business resources are acquired.

Conclusion

The training program for business reference at UNLV Libraries was created to improve the library staff's basic knowledge of business resources and increase the quality of service to patrons with business queries. Establishing this type of training program was important because business students are one of the largest populations served by UNLV Libraries. A training program ensures staff are well-trained and feel comfortable answering many types of business questions. Patrons who have a pleasant and informative experience at the library will more than likely be repeat customers.

Any type of business training program should be a continuous process because libraries hire new staff and purchase new resources. Although this article only discusses the area of business, training programs are also essential for other disciplines. For the same reasons, training programs that cover disciplines from the most often served populations is vital.

Training programs serve the needs of library staff by developing their research skills in broad areas and helps serve the needs of patrons by employing a well-educated staff. Training programs help promote an environment of staff development and success.

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Appendix I

I. COMPANY INFORMATION HOMEWORK

1. I'm looking for some basic information about Proctor & Gamble. How many employees does the company have? What is the ticker symbol for Proctor & Gamble? On what exchange is the company's stock traded? Who is the company's auditor?

2. Where does MGM conduct business outside the United States?

3. I am interested in getting revenue figures for 2000 and 2001 for Park Place Entertainment. More specifically, I want revenues from there Mid-South Region casinos.

4. I would like to know more about Mars, Incorporated. On which stock exchange the company is traded? Besides candy, what other products does the company sell?

5. I need an article about General Electric and their company culture. Please provide the copy of an abstract for this article.

II. INDUSTRY INFORMATION HOMEWORK

1. Find an article on the "chemicals industry." Please provide an abstract of the article.

2. For the United States area, I would like the top beer brands by sales in 2000 or 2001. I would also like the top imported beer brands.

3. The biotech industry is growing in the Southern Nevada area. I would like some information on these categories:

   a. I would like information on biotech medicines in development by therapeutic category.
   b. Revenue figures for the top three public companies in the industry.
   c. Employment figures for the industry (1999-2001)

III. MARKET RESEARCH HOMEWORK

1. What is the target market for the Toyota Matrix? (Use *Simmons Market Database*).

2. I am interested in opening a restaurant in the Summerlin area. I would like a list of other restaurants in the area and a resident profile (marriage status, education, income, etc.)

3. How much money did people aged 18 to 34 spend on pet products in 2002?

4. I am interesting in starting a business in Boise, Idaho. I would like to obtain a list of lifestyle characteristics for the population in that area.

Appendix II

BUSINESS SUBJECT GUIDES

I. Company Information:
    < http://www.library.unlv.edu/subjects/business_company.html>
II. Industry Information:
    < http://www.library.unlv.edu/subjects/business_industry.html>
III. Market Research Information:
    < http://www.library.unlv.edu/subjects/business_market.html>

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Appendix III

COMPANY INFORMATION RESOURCES

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Company History

Company's Website
International Directory of Company History
U.S. Corporate Histories
Business & Company Resource Center*****

Financials

Academic Universe*****
Business & Company Resource Center
Hoovers Online (http://www.hoovers.com)
Mergent Online*****
Standard & Poor's NetAdvantage*****

SEC Filings

Academic Universe
Edgar Online
Mergent Online

Stock Information

Business & Company Resource Center
Investext
Mergent Online
Standard & Poor's NetAdvantage
Valueline

Company Rankings

Business & Company Resource Center
Business Rankings Annual
Forbes
Fortune
Market Share Reporter

Company Philanthropy

Corporate Giving Directory
The Corporate 500: Directory of Corporate Philanthropy
The Foundation Directory

* denotes "core" resource

Appendix IV

INDUSTRY INFORMATION RESOURCES

Industry Classifications

NAICS
SIC

Industry Norms/Financial Ratios

Almanac of Business & Industrial Financial Ratios
Industry Norms & Key Business Ratios
RMA Annual Statement Studies
Standard & Poor's NetAdvantage

Industry Reports

Investext
Valueline

Industry News

Abi/Inform
Academic Universe
Business & Company Resource Center
General Business File ASAP

Industry News

Abi/Inform
Academic Universe
Business & Company Resource Center
General Business File ASAP

Industry Associations

Associations Unlimited
Business & Company Resource Center
Industry Link
Standard & Poor's NetAdvantage

Industry Rankings

Business & Company Resource Center
Business Rankings Annual
Forbes
Market Share Reporter
Price's List of Lists

Industry Overview

Business Week Online
Business & Company Resource Center
Fortune
Hoovers Online
Standard & Poor's NetAdvantage
U.S. Census Bureau
Wetfeet

Appendix V

MARKETING RESEARCH RESOURCES

Demographic Resources (Print)

2001 City & County Extra
American Demographics Magazine
American Marketplace: Demographics & Spending Patterns
American Men & Women: Demographics of the Sexes
Demographics USA
Demographics of the U.S.: Trends & Projections
Sourcebook of Zip Code Demographics
Rand McNally Commercial Atlas & Marketing Guide

Demographic Resources (Internet)

American Factfinder
FedStats
Statistical Abstract of the United States

Consumer Behavior/Lifestyle Interests

Generation X: Americans aged 18 to 34
The Baby Boom: Americans Ages 35 to 54
Americans 55 & Older: A Changing Market
Lifestyle Market Analyst
Statistical Portrait of the United States: Social Conditions & Trends

Buying Power/Spending Habits

American Incomes: Demographics of Who Has Money
American Marketplace: Demographics & Spending Patterns
The Official Guide to Household Spending
Household Spending: Who Spends How Much on What?
Who's Buying for the Home
Consumer Expenditure Survey (http://wwwbls.gov/cex/)

Market Research & Survey

Editor & Publisher Market Guide
Broadcasting & Cable Yearbook
Encyclopedia of Major Marketing Campaigns
Marketing Research Guide
U.S. Market Trends & Forecasts
Marketing Virtual Library (http://www.knowthis.com/)

Market Share

Business Rankings Annual
Dun & Bradstreet's Business Rankings
Market Share Reporter

Ward's Business Directory
Ad Age Data Center (http://www.adage.com/datacenter.cms)

Advertising

Advertising Ratios & Budgets
Broadcasting & Cable Yearbook
Direct Marketing List Source
Gale Directory of Publications & Broadcast Media
Standard Directory of Advertisers
Standard Directory of Advertising Agencies
Standard Rate & Data Service:
- Business Publication Advertising Source
- Circulation
- Community Publications
- Consumer Magazine
- Direct Marketing List
- Newspaper
- Print Media
- Radio TV & Cable

Ad Age Data Center (http://www.adage.com/datacenter.cms)
Green Book: International Directory of Marketing Research & Services (http://www.greenbook.org/)
Advertising World (http://advertising.utexas.edu/world/)

Advertising Articles

ABI/Inform
Academic Universe
General Businessfile ASAP
Business & Company Resource Center

Local Demographic Resources

Las Vegas Perspective
Prime Prospects

Appendix VI

Company Information Workshop Survey

1. What is a useful fact or technique you learned during the session?

2. What was covered during the session that you already knew?

3. What was not covered in the session that you would like to know more about?

4. What topic(s) were unclear?

5. Is there a topic you would like covered in more detail?

6. I found the information covered in the session to be helpful?

__ Strongly Agree __ Agree __ No opinion __ Disagree __ Strongly Disagree

7. I believe I have a better understanding about company research as a result of this session?

__ Strongly Agree __ Agree __ No opinion __ Disagree __ Strongly Disagree

8. I feel more confident performing business reference as a result of this session?

__ Strongly Agree __ Agree __ No opinion __ Disagree __ Strongly Disagree