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Library Orientation Practices in Special Libraries

Abstract

Purpose: The library orientation session is an important marketing tool because it offers the first opportunity for library staff to connect with new clients (Craft & Ballard-Thrower 2011, Rhoades & Hartsell 2008). This article explores library orientation practices in special libraries and information centres with the goal of surveying current practices and identifying guidance for successful orientation program design and delivery.

Design/Methodology/Approach: This study explored library orientation practices in special libraries and information services through an electronic survey. The survey questions were developed based on themes that emerged from case studies on library orientations from the academic library literature. These themes included (1) reasons for library orientation program redesigns, (2) the importance of partnerships in orientation design and delivery, and (3) the tools and techniques used in the delivery of orientation sessions.

Findings: The results revealed that library orientations are taking place in special libraries, but there is no consistent approach to library orientation delivery. Even within a single library, multiple approaches to library orientations are taken based on client availability, demand, and information needs observations of library staff. Participants responses were analyzed to develop recommendations for special library orientations. These include developing partnerships (particularly with human resource departments), using technology strategically, considering the timing of orientations for new potential clients in relation to their start as new employees in the host organization, customizing library orientations based on client segment, engaging in ongoing outreach, and being flexible in design and delivery methods.

Originality/Value: While academic and practitioner literature exists detailing library orientation activities in academic and school libraries, there are very few articles on special library orientations. This study fills a gap in the literature by investigating library orientation practices in special libraries and information centres.

Introduction

Libraries of all types strive to communicate their value and build relationships with current and potential client groups. They employ a variety of marketing tools and techniques in order to achieve this goal. A key tool for many libraries is the library orientation session. The library orientation session is an important marketing tool because it offers the first opportunity for library staff to connect with new clients (Craft & Ballard-Thrower 2011, Rhoades & Hartsell 2008). It offers not only opportunities to share information about the resources that the library has to offer, but also for clients to provide feedback about their needs and expectations.

The planning, structure, and delivery of library orientations and other library training sessions in academic and school library settings have been explored extensively in the academic and practitioner literature (for example Goodfellow & Galloway 2018, Rust & Brown 2018, Brown 2017, Rod-Welch 2017, Goldman et al 2016, Craft & Ballard-Thrower 2011, Currie 2009, Mills & Mitchell 2009, Rhoades & Hartsell 2008). The topic of library orientations in special libraries, however, has received very little attention. This article explores library orientation practices in special libraries and information centres with the goal of surveying current practices and identifying guidance for successful orientation program design and delivery.

Special libraries and information centres offer information and knowledge services related to a specialized subject or to a specialized population and are found in a variety of sectors (for-profit, not-for-profit, and public). There are sub-categories within the special libraries field, including medical libraries, law libraries, government libraries, and corporate libraries. Special libraries may exist within a larger academic or public library system. Special libraries' mandates and services are always guided by those of their host or parent organization, which leads to significant variation in their collections and services. Despite these differences, special libraries have many shared concerns and practices, and marketing their collections and services is one of these.

Literature Review

While there are large bodies of literature on orientations inside and outside of the library sectors, very few articles on library orientations in special libraries are available. Because of the lack of resources on library orientations in special library settings, literature on both academic library orientation sessions and corporate employee orientations were examined. The literature on corporate employee orientations was generally written from a human resource management perspective and is relevant because special libraries may be given the opportunity to present as part of a larger corporate orientation session.

Corporate Employee Orientation Sessions

Because special libraries are often situated within larger organizations literature on corporate employee orientation sessions was examined. The focus of the orientation sessions featured in this literature is as a tool for integrating new employees into the workplace. This is different from the type of orientation examined in this study which is meant for users of the special library rather than employees of the special library.

Understanding the theoretical foundations of new employee orientation can help special librarians understand how to integrate their library orientations into their host organization's larger new employee development programs. New employee orientations have two objectives: socialization (the process through which new employees become integrated into their workplace culture) and training (the mechanisms through which employees acquire the skills and competencies required to complete their workplace tasks) (Herrington 1998, Holton III 1996). Socialization has been linked to higher

satisfaction and better employee retention rates while skill and competency development is required for employees to perform their work roles (Lewis, Thomas & Bradley 2012, Rocchetti 2006, Holton III 1996). Library orientation generally focus on training by providing clients with information about library resources that can assist them in performing their jobs, but they may also be linked to socialization. For example, special librarians may frame their library orientations in terms of an evidence-based organizational culture.

Academic Library Orientations

Library orientations share the socialization and training objectives of organizational (typically corporate) orientation and new employee development programs. Library orientations seek to socialize library users into the skills and competencies required to navigate the modern information environment. Several authors have linked participation in library orientation programs with later collection and service use and improvements in information literacy skills (Goldman et al 2016, Lei Hsieh & Holden 2010).

The vast majority of library instruction literature focuses on the experiences of students (secondary or post-secondary) offered by school or academic librarians. Several authors, however, have explored the experiences of adults (Lange 2015, Turcotte 2015, Hoyer 2011, Nielsen & Borlund 2014, Lai 2011). One example of an article that addressed special library orientations was Hurst’s (2003) article about the development of library services for campus administrators and described the development of an orientation session for this population. The orientation sessions considered specific information seeking behaviour among this population who would use library services to fulfil work tasks rather than for research or study in ways that align with adult learning research. In particular, it was noted that they sound information in order to find answers to specific questions, worked to tight deadlines, searched for information on behalf of others, and were unfamiliar with the library’s research resources (Hurst 2003, p. 232). Special libraries would primarily serve adult clients, most of whom would access library services in order to fulfil specific work or professional tasks such as the preparation of a work report or presentation, responding to a question from a client or manager, or engaging in professional development or training.

Fostering partnerships in order to develop, promote, and deliver library orientations was another theme in the literature. Goldman et al (2006) and Mills and Mitchell (2009) discussed creating a team of people with a variety of skillsets to develop a revised library orientation program. Rhoades and Hartsell (2008) discussed collaboration between the library and the university orientation office. Rust and Brown (2018) emphasized the importance of collaborating with non-academic departments in universities. Finally, the most commonly mentioned partners in the academic library literature were university faculties and departments or individual faculty members, who partnered with library staff to incorporate library instruction into the curriculum (Dhawan & Chen 2014). The survey included a question about partners in special library orientations to determine what types of partnerships were created to develop or promote orientation sessions.

Case study articles tended to describe situations in which librarians redesigned their library orientation programs in response to external or internal forces. Motivations for library orientation redesigns included the reduction in available time for library instruction (Lange 2015), reduced availability to engage on the part of partners (for example, difficulty in scheduling classroom visits) (Diekema, Gerrity & Mitchell 2019, Brown 2017), and a desire to improve the effectiveness of sessions (Witek & Spirito Dalgin 2019). The survey included a question about whether participants had recently modified their approach to new client orientations in order to understand whether special library orientations are in a state of transition and to determine if any of the change forces impacting academic libraries were also impacting special libraries.

There was also a large collection of articles focused on educational theories, approaches, and techniques informing library orientation design and delivery in academic libraries. Common library orientation activities include group activities, resource demonstrations, and tours (Goodfellow & Galloway 2018, Brown 2017, Rod-Welch 2017, Goldman et al 2016, Lange 2015, Rice & Gregor 2013, Thrower 2011, Hurst 2003). Some authors focused on types of learning, such as cooperative learning, active learning, learner-centered programming, and problem-based learning (Brown 2017, Simard 2009), while others explored specific instructional methods and techniques. These methods online learning modules (Parramore 2019, Goldman et al 2016, LeMire 2016), flipped classes (Rodriguez 2016), the inclusion of games, competitions, and escape rooms (DiNardo & Snyder Broussard 2019, Kirk 2019, Veach 2019), choose-your-own adventure flipbooks (Korber & Shepherd 2019), and collaborative speed drawing (Brier & Lebbin 2015). Although the content of client orientation sessions differs from library to library, a multiple-choice question offering orientation activities featured in these academic library case study articles was included in the survey. Because many of the techniques used in academic libraries focused on information literacy, special librarian participants were also asked whether they included information literacy training in their orientation to determine whether this key focus of academic libraries' orientation sessions also informs special library orientation session design.

An examination of the literature on library orientations reveals a key gap regarding library orientation practices in special libraries. There is a lack of research or practitioner literature available to help special library workers to understand what practices are currently being employed in the field and what strategies have proven successful in the design and delivery of orientation sessions. The literature did, however, reveal several themes that were built into this study's survey: (1) reasons for library orientation program redesigns, (2) the importance of partnerships in orientation design and delivery, and (3) the tools and techniques used in the delivery of orientation sessions.

Methodology Selection

The literature review on library orientations revealed a number of case studies from academic libraries. These case studies offered qualitative data concerning how library

orientations were designed and delivered and what motivated these decisions. The lack of literature on library orientations in special libraries raised the question of whether academic library orientation practices would be relevant in the special library context.

Data were gathered using an electronic survey. The survey was constructed using Google Forms and was distributed through social media, the Special Libraries Association (SLA) listserv, and the American Libraries Association (ALA) listserv. The survey was selected due to its speed and ability to capture high-level information about orientation practices in order to begin identifying practice patterns.

The survey consisted of fifteen questions. The majority of the questions offered single or multiple-choice responses while three questions allowed a free-text response. The free-text format was used for questions in which response options were potentially too broad to be captured in a multiple-choice list. This design meant that while the majority of the questions yielded quantitative data that would be analyzed through frequency counts to determine the prevalence of options among respondents, the free-text responses yielded qualitative data. Content analysis was used to identify themes in these free-text responses. The content analysis categories were developed based on themes identified in the literature.

In addition to gathering profile information about the special libraries, the survey questions were developed based on themes that emerged from case studies on library orientations from the academic library literature. The survey attempted to triangulate the themes by determining the extent to which they reflect the orientation practices and experiences in special libraries.

The participants in this survey were employees of special libraries and information centres. The survey received 55 responses. This number is low in relation to the estimated number of special libraries in North America, but variations in responses to library profile questions shows that this group was heterogeneous and illustrates the variability that exists within the special library and information services community. When asked about library focus, the most popular selections (with multiple selections possible) were: (1) Science / Technology (25 respondents), (2) Business / Competitive Intelligence (19 respondents), (3) Government / Public Service (16 respondents) and (4) Law / Legal Resources (16 respondents). Libraries of all sizes were included in the participant group. Reflective of trends within the special library community, 70.9% of participants worked in libraries with between two and ten employees while 20% were solo librarians. The size of the client base served by these libraries and information services was also examined. Over half of the respondents reported serving 1000 clients or more.

Results

Library Orientation Offerings

It could not be taken for granted that special libraries offer library orientations. As outlined in the participants section, many special libraries are staffed by a single library worker who must respond to the information needs of hundreds of clients. 89.1% of participants reported that they offered orientations with a few reporting that they had initiated the practice of offering orientations to clients.

The timing and structure of orientation sessions offered by participants varied. Twenty-six participants reported offering orientation sessions whenever new clients arrived at the host organization while seven offered self-paced or online training available to employees at any time in addition to scheduled orientations and training. Higher frequency scheduling (weekly or monthly) of orientation sessions was more commonly selected than lower frequency scheduling (annually or semi-annually). Half of the participants in the study (27 participants) reported orientation sessions of 30 minutes or less.

Redesigning Library Orientations

The literature review suggested that approaches to library orientation sessions in academic libraries has been changing. Participants were asked if they had modified their approach to new client orientations recently and the reasons for these changes. This was a free text response and was not mandatory. Fourteen participants indicated that they had not modified their approach and 23 left the question blank. The final question in the survey asked participants to share other comments about new client orientation. As with the other non-mandatory free text question, the majority of participants either left the question blank (28 participants) or simply wrote that they had no comments (6 participants). Some shared themes emerged across these two questions, so the responses to both of these questions will be presented together here.

The first theme that emerged was challenges related to running orientation programs. The first challenge was identifying and reaching new clients. Not all participants had partnerships in place with human resources or other organizational units that send lists of new employees to the library. Those that did not receive new employee lists had to resort to multipronged promotion approaches to attract new potential clients to library orientation session:

"We advertise the monthly sessions via all-building email blast, rotator on our website, and stand-up easel posters in the lobby of our main building. We also advertise the sessions as "coffee and questions" and we serve coffee and snacks."

Some participants reported recently developing new arrangements within the organization to make library orientation programs mandatory for certain user groups. In some cases, library orientations are embedded in organization-level orientation programs, in some they are part of departmental or team orientations (for example, orientations for new interns), and in other cases library orientations are incorporated in

specific training sessions offered by other units in the organization (for example, one participant reported that the library presents as part of a Record Sealing clinic).

A second challenge that was discussed by participants was that of creating efficiencies in the orientation process. Many participants reported conducting library orientations whenever new employees arrive, which although it allows for individual attention and relationship building, creates significant work for library staff. One approach that participants have taken to address this issue is to use technological tools to support library orientations. Several participants reported switching to online training videos and webinars to facilitate group sessions for staff across work locations and to save staff time.

Timing of orientation sessions was another discussion topic. Several participants reported waiting between two weeks and a month after a new employee started with the organization in order to allow the library client time to develop a sense of the information needed to fulfill their new work role. Multiple participants also reported staggering the library orientation process. They initiated contact with new clients through an introductory email or preliminary meeting with new library clients and then providing either structured training at later dates or ad hoc sessions based on clients' requests:

"For new staff orientations, the entire SL team meets to introduce themselves and their specialty. Then only our director and the librarian who will be most directly supporting the new staff member have a longer conversation about the type of support we provide."

"I schedule a calendar reminder to follow-up with new employees in six months, to ask if they have any questions; if they are finding anything confusing; if they've had any trouble using library resources, etc."

"We receive a list of all new hires monthly and email them an overview of our services along with an invite to the orientation (we provide three 30 minutes sessions to address global time zones)."

Several participants advocated this staggered approach including smaller group or individual sessions because they encouraged active participation and could be more closely tailored to new clients' needs. Shorter and more tailored sessions were, for some participants, direct responses to low participation rates in longer, large group orientation sessions.

Another theme that emerged from several participants' responses was that of the fluid nature of library orientations. In addition to tailoring library orientations to the information needs of different client groups, participants also reported modifying library orientations based on the latest tools, trends, and developments in libraries, information access, and retrieval.

A final topic raised by participants was the value of library orientations. The goal of the library orientation is to inform library clients of the library resources available to them in order to encourage their use. Librarians cannot assume that new employees will be aware of these resources: "Some percentage of the customers are always astonished at the resources the library presents to them". One participant reported that even if only a small portion of new employees participate in the orientation sessions, those that do are likely to become regular library users.

Partnerships

Building partnerships within the university community was described as a success factor for academic libraries. A question was therefore included in the survey to determine if partnership were also important to the development and delivery of special library orientations. This question allowed for free text responses in order for participants to elaborate upon the types and nature of partnerships undertaken. 44 of the 55 participants responded to the question. The most common response was that the library did not engage in any partnerships in order to run or prepare orientation sessions (28). The most frequently cited partner was the human resources (HR) teams. In some cases, the partnership was created for the library to receive lists of new employees which the library would then use to organize their own orientations. In others, the library was included in an HR-organized orientation program. Some participants identified particular partnering units within their organizations. These libraries offer orientations only to employees within units that are most likely to use their services. These partnerships allow the library to tailor their orientations based on the needs of these client segments. Other partners included teams offering various types of management or membership services, the organization's training, corporate learning or talent development team, and the information technology department. Partnerships were also identified as helpful in promoting library orientation sessions. Libraries depended on referrals by human resources departments and managers and supervisors as key methods of attracting participants in library orientations.

Library Orientation Delivery Tools and Techniques

The academic library literature offered descriptions of numerous teaching techniques and tools used in either library orientations or bibliographic instruction sessions. A list was created based on the types of techniques and approaches found in the literature to determine which were used in special library orientation sessions. Participants were given the opportunity to select multiple options and very few respondents selected only a single type of activity. In cases where only a single activity was selected, live resource demonstration, physical tours, and links lists, handouts, or tip sheets were the most commonly selected. The most selected options among all participants were: (1) live resource demonstrations (36), (2) physical tours (27), (3) question and answer sessions, and (4) handouts / tip sheets (22).

Participants were asked if they include information literacy training in their orientations. The majority of respondents (63.5%) reported that they did not offer information literacy

training. 13.5% reported that they do offer information literacy training. The remaining 23.1% answered 'maybe' suggesting that elements of information literacy training may be included in the training, but that they were not a standard component of orientations.

Discussion

This study sought to understand the library orientation practices of special libraries and information centers and to determine whether the library orientation practices of academic libraries were applicable. The survey sample was small but reflected the variations in size, foci, and client bases that characterize special libraries. The results revealed that library orientations are taking place in special libraries, but there is no consistent approach to library orientation delivery. Even within a single library, multiple approaches to library orientations are taken based on client availability, demand, and information needs observations of library staff. For example, a special library may begin the library orientation process with a welcome email for new host organization employees and then offer both regularly scheduled structured group orientation sessions and ad hoc library instruction sessions tailored to different teams or to highlight different library products or services.

How applicable the literature on library orientations are to special libraries cannot be easily answered from this survey. The findings suggested that there are some structural differences in the way that academic and special libraries offer library orientations, but because of the differences that exist between special libraries, some special libraries orientation sessions may more closely resemble academic library orientations than those of other special libraries. Special libraries that offer library orientations for interns in research-focused organizations offer in-person, group training sessions that closely resemble the library orientation sessions than special libraries in the corporate sector that offer ad hoc library orientations to new host-organization employees on a one-on-one basis as they arrive.

Implications for Practice

The responses to this survey revealed information about key practices and challenges that can be used by special library practitioners seeking to implement or redesign a library orientation program in their library. Some of the key findings are highlighted below.

Partnerships. A useful practice among participants was to develop a partnership with the human resources department in order either to receive lists of new employees when they arrived in order to contact them to participate in library orientations or to be included in the HR organized new employee orientation program.

Technology Use. Special libraries were very strategic in their use of technologies. Some used technologies to create training and orientation opportunities for remote workers. Others used technology to pre-record elements of their training and orientation in order to save time. Some revised their training approach to ensure that new clients

would be able to sit at workstations and actively engage in learning activities during their training sessions.

Orientation Timing. Delaying the library orientation is a strategy to ensure that new clients get the most out of the session(s). Several participants reported waiting between two weeks and a month after a new employee started with the organization in order to allow the library client time to develop a sense of the information needed to fulfill their new work role. Multiple participants also reported staggering the library orientation process. They initiated contact with new clients through an introductory email or preliminary meeting with new library clients and then providing either structured training at later dates or ad hoc sessions based on clients' requests.

Customization Based on Client Segment. Market segmentation was used to design orientation sessions, with many special libraries creating orientations that were tailored to clients based on their unit/division or employee type (i.e. sessions designed for interns).

Ongoing Outreach. The special library orientation is one point in an ongoing exchange between special libraries and their clients. Special librarians reported promoting the library orientation and training sessions through multiple channels (going through HR, divisions, promotional materials in public spaces, introductory emails, etc.). They then followed-up with new employees to see if they needed any additional training or support.

Fluid Design and Delivery. Special libraries approach to orientation sessions isn't static. In addition to tailoring library orientations to the information needs of different client groups, participants also reported modifying library orientations based on the latest tools, trends, and developments in libraries, information access, and retrieval.

Mixed Delivery Tools and Techniques. Special libraries employ a wide range of techniques and tools in their orientation tours. The most selected options among participants were (1) live resource demonstrations (72%), (2) physical tours (54%), (3) question and answer sessions (54%), and (4) handouts / tip sheets (44%).

Library Orientations Are Useful. The goal of the library orientation is to inform library clients of the library resources available to them in order to encourage their use. Librarians cannot assume that new employees will be aware of these resources: "Some percentage of the customers are always astonished at the resources the library presents to them". One participant reported that even if only a small portion of new employees participate in the orientation sessions, those that do are likely to become regular library users.

Limitations and Opportunities for Future Research

This study represents a starting step in an exploration of library orientation practices in special libraries. The key limitation of this study was the low response rate leading to a

small sample size. A larger sample of special libraries would be needed in produce a quantitative analysis of the prevalence of practices with an acceptable degree of statistical significance. Alternatively, smaller samples of special libraries organized by characteristics such as size or type (e.g. corporate libraries, law libraries, medical libraries) could be conducted to determine if distinctive trends exist within these special library types.

Other methodologies may also be employed to discover different aspects of library orientations in special libraries. A qualitative study to elaborate on the trends discussed in this paper using focus groups or in-depth interviews would help to validate and clarify results. Methods that offer detailed investigations into the practices within a single or small set of special libraries such as case studies could offer insights into the design and delivery of special library orientation sessions.

Finally, the study focused on the library orientation practices of special libraries but not on their results. Future research may focus on the impact and effectiveness of these sessions from either the library or the library clients' perspectives.

Conclusion

This study addressed a gap in the academic and practitioner literature regarding the library orientation practices of special libraries and information centers. Understanding what practices are currently being deployed in the field can benefit several stakeholders. This knowledge can assist current practitioners in designing and delivering library orientations in their own organizations. It can also assist professional associations and LIS educators in preparing training materials that address the trends and challenges identified in library orientation practices. This article serves as a starting point for investigating this subject. Several future research directions are possible. A first possibility is to compare library orientation practices between types of special libraries or between special libraries in different geographic regions. A comparison between the orientation practices of special libraries that serve local clients versus those that serve geographically distributed clients would also be possible with a larger participant set and questions that target these client factors. In addition, this study only explored the structure of orientation sessions. A deeper examination of the content and delivery methods may provide useful insights for practitioners and researchers. Finally, this study did not look at the impact of library orientations on end-users. Client perceptions of the effectiveness of delivery methods would also be useful to practitioners within and beyond the special library community.

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