CARIBBEAN DEVELOPMENT AND CO-OPERATION COMMITTEE

THE CARIBBEAN REGION

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
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USE OF ORIENTATION AND REORIENTATION

AS A MEANS OF USER EDUCATION

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Library orientation is a term that has historically been used to describe any attempt to instruct library users in the ways and means of using libraries. In recent years, however, it has taken on a special, more limited, and I feel somewhat negative, meaning. To quote from a recent textbook on the subject: "It is that portion of library instruction which introduces patrons to the physical layout of the library". This more restricted definition is most often found in the literature relating to academic and research libraries where the concept of orientation is many times considered passé.

I would like to suggest, however, that unless any library is completely self-explanatory to the uninitiated user when he enters the library building, room or rooms, an orientation programme is a necessary component of the total library programme and that the responsibility to educate the user, to promote the library, to promote a continuing awareness of library services, particularly in a special library, is as much a responsibility of the librarian as is the need to develop and organize the information resources and to manage their exploitation through the provision of services and the development of service products.

What then should be the proper ambit of orientation activities in a special library? And why have I titled this paper orientation and re-orientation?

Regarding orientation, let me expand a little on the definition quoted above. It is true that users and potential users must be given an introduction to the physical layout of the library but orientation should involve more. In Renford and Hendrickson's Bibliographic Instruction: A Handbook, the authors define orientation as "activities that introduce patrons to the facilities, services and policies of the library" [1] and refer to guided and self-guided tours as common examples. In a special

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1/   Beverly Renford and Linnea Hendrickson, Bibliographic Instruction: A Handbook (New York: Neal-Schuman, 1980) p. 185.

library I feel that this need be expanded even further, so that orientation
is seen not only as a process of capturing the new staff member and orient-
ing him toward the library as a primary and effective source for meeting
his information needs, but also a process of maintaining the library's
identity, of recapturing lost clientele, of re-orienting those who may have
fallen out of the practice of using the library. Hence, orientation and
re-orientation.

In total, then, I believe that in a special library, orientation must
be seen as those continuing activities aimed at insuring that users and
potential users remain orientated toward the library as a primary source
of meeting their information needs. It is not a one-time affair or event,
but a continuing process. Within this scope, the following activities and
techniques will be considered: group and individual tours, tape/slide
presentations, printed guides and other printed aids, displays, notice
boards and library signs and guiding.

Users

However, before going on to consideration of specific activities and
techniques, they must be placed within the context of information users,
particularly users of information for socio-economic planning, that is
practitioners, as distinct from the layman or the academic researcher.
Your libraries cannot justify their existence without users, and though
we are all aware of this, I believe that too often we have a tendency to
produce for other librarians, because this is the way we were taught it
should be done, rather than to produce for the user. When designing a
poster, when preparing a library guide, when considering what to include
in a library tour, the users reaction and response to the product must be
foremost in the design. Test some products and sample reaction with selected
users; modify and change.

The planning and implementation of library programmes must take into
consideration both the user and the potential user. Knowledge of your
clientele, whether gained formally through survey techniques, or informally

through critical observation, testing ideas or reading the relevant
literature, is an essential component of such plans. One must have a
thorough knowledge of the environment in which they work, their work, their
work patterns, their concept of information, their information demands, in-
formation needs, information-seeking behaviour and the uses to which they
put information. Why do they need information for their jobs? What type
of information?

In our context we are of course speaking of practitioners involved
in the process of governmental decision-making in the sectoral and national
levels of socio-economic planning, the formulation of development plans,
evaluation of programmes and projects and so forth, a relatively homo-
geneous group, though a group which has not been studied in depth.

What are some of the factors or characteristics of this set of people
which must be considered when formulating an orientation and continuing
library awareness programme?

Firstly, I should like to make mention of social scientists, both
researchers and practitioners, in a very general way. A major study, the
Investigation into the Information Requirements of Social Sciences (INFROSS)
was conducted in Britain in the late 1960's and early 1970's and though a
wealth of data was collected and analysed (much of which may not have a
great deal of relevance to our situation) I wish to bring to your atten-
tion one observation contained in a summarising article by Maurice Line,
the principal investigator, who has rather amusingly, though I think aptly,
commented that information users in the social sciences can be categorized
into three types (drawn on analogy from anthropology):

1. the hunters,

2. the grazers, and

3. the highly domesticated species that stays at
   home or in his office and waits to be fed. 2/

2/   Maurice Line, "The Information Uses and Needs of Social Scientists.
An Overview of Infross", Aslib Proceedings, vol. 23, no. 8, August
1971, pp. 412-434.

Regarding the hunters, we do not have to worry too much: with a brief orientation to the physical layout of the library (which nevertheless must be provided) they can be left to hunt on their own and with likely productive results. Unfortunately, the hunting practitioners are few in number. The grazers, we must spend more time with, orienting, directing and encouraging them toward the fertile resources and services provided by the library. The third proposed category, that highly domesticated species who wishes to be fed, provides the far greater challenge and unfortunately may exist in greater numbers than either of the previous two groups. Orientation and library awareness techniques must take all three categories into consideration, even those who wish to stay home and be fed. You may not be able to breast or bottle feed them with information to the extent that they would wish, however, you should miss no opportunity to remind them that you do operate an information-feeding station. If your orientation and awareness activities aim at this group, the other two categories will not be ill-served.

Secondly, your users and potential users are very busy people who are unlikely to drop in to the library and browse around as one might in a public library. Unless they are of that class of hunters, it is unlikely that they would have the time or motivation to find the time for such things as scheduled orientation tours, group lectures on use of the library and other such activities perhaps more geared for academic and school libraries. There are two implications here which I wish to stress:

(1)   the personal touch and contact in orientation acti-
        vities is a prerequisite for a dynamic special
        library and though at times difficult to accomplish
        with slender staff resources, is not impossible;

(2)   continuing programmes of maintaining library identity,
        library awareness or re-orientation, as I have phrased
        it, depend on effective utilization of outreach acti-
        vities.

I will return to these themes later when discussing specific techniques.

Thirdly, your users are graphically sophisticated, having been exposed to television commercials, advertisements and the aggressive selling of products of all sorts which pay great attention to the presentation of the product through subtle means, whether they be psychologically based or

identificationally based. This graphic sophistication, particularly when coupled with the pressing nature of much of your clientele's work, means that in order to be effective, your own orientation activities, informational and promotional brochures, printed guides and so forth must display a measure of graphic sophistication if they are to be effective, that is to elicit desired responses.

One further point I wish to make regarding information users, and this observation is again from Maurice Line:

> "The real aim of libraries, I would argue, is to see that
> users get the information they need; and we can and should
> often enable them to do so without attempting to educate
> them. When I want to go somewhere quickly, I call a taxi,
> and do not expect or want to be taught how to drive. Never-
> theless, I may not always be able to call a taxi, there may
> not be one at hand, or it may cost too much, or I may want
> to have my movements more under my own control. It is there-
> fore useful to learn how to drive, whatever balance I may
> eventually strike between driving and being driven.
>
> I have chosen this analogy with care, because library in-
> formation use is, like driving, a practical skill, not some-
> thing to be taught like history. It is a skill one picks
> up and acquires facility in through continued practice. For
> this reason, occasional users will probably neither wish to
> learn it nor be able to do so very effectively, as they will
> not have sufficient practice." 3/

My point in bringing this observation to your attention is not to downplay any user education and bibliographic instruction activities but to point out that the occasional user, the one who wishes to call a taxi rather than learn to drive, the one who is unlikely to profit greatly from intensive bibliographic instruction programmes, must still know where to find that taxi, must still be made aware of and constantly re- minded that the library can provide an information taxi service. This is an essential aspect of orientation and re-orientation.

In summary, know your clientele, know your users, know your potential users, and build your orientation programmes and techniques around those people.

3/   Maurice Line, "The Case for Information Officers", in John Lubans, Educating the Library User (New York: Bowker, 1974) pp. 384-85.

Specific Techniques

I indicated earlier that a number of specific techniques would be considered in this paper. No one technique by itself could comprise an effective orientation programme but several, developed and implemented in conjunction with each other and in conjunction with other user education programmes, will be necessary. The decision to use one or another, and the content and format of each, will largely be determined by the mix of conditions which obtain in each of your individual settings. Objectives will vary but should be precisely formulated particularly from the behavioural objective point of view, that is what is it about the users information seeking behaviour that you wish to influence, modify, or change.

Library Tours

Group library tours are unlikely to be an effective method of introducing new staff members to the special library because new staff usually do not join the organization at the same time. They may, however, be an efficient means of introducing members of the organization to a new library facility (should you be lucky enough to acquire new and more functional premises). This is particularly true if coupled with a general open house, perhaps scheduled with refreshments or other enticing features, though this should be a distinct activity, separate from any formal opening of the new premises. Scheduling should be flexible enough to accommodate busy work patterns: for instance, scheduling open house activities when perhaps half of your clientele are in the midst of working on a major project would result in little attendance. Schedule it after the completion of a major project - and here it is clear that the effective special librarian must be in tune and aware of the work, the work loads and timing of project reports being generated from the organization.

Staff members are normally joining your organizations throughout the year. In order to capture these potential users, the librarian must be aware of who is coming in, of what their job-related information needs are likely to be, whether they be permanent staff or temporary project staff. In order to accomplish this some procedure must be established whereby the

library is notified promptly of new staff members with an indication of
the nature of the work assignments. If there is a general orientation
programme for new staff members to the ministry or department, the library
should ensure that this opportunity is effectively utilized, not just with
a quick point at the library's door or peek through it, while the new
staff member is being conducted on a general tour through the building.
This general orientation programme, if it exists, should be utilized to
motivate the new staff member to have a personal orientation to the library
at a later date, remembering that most new staff members are primarily
concerned about finding their way around their new work milieu and their
substantive duties. The packing of too much information into a short
period will result in selective retention of that information: the in-
formation retained, being that for which the person is most highly moti-
vated, and within the first few days of a new staff member's tenure, in-
formation services are likely to be low on his motivation scale. A note
from the librarian or better a telephone call or other personal contact
during the second or third week, after the new staff member has settled
in to some degree, is likely to be more effective in motivating the user
for a library introduction.

There are, however, situations in which the individualized tour is
not practicable, but yet some form of individual user orientation is
desirable. A self-guided tour, in which the patron uses either a printed
handout or a portable audio-tape player directing him from place to place
in the library is sometimes used in academic and large public libraries,
though I think that this would not be an effective device for your
libraries because of their relatively small size and because extra effort
is required on the part of the user. I would suggest that a stationary
audiovisual presentation is likely to be more effective because it is
easier to use. Film, synchronized tape/slides and video cassettes are
options, though I wish to comment on the synchronized tape/slide presen-
tation in particular.

Tape/Slide Presentations for Orientation

Tape/slide presentations, which consist of 35mm slides synchronized with an audio tape narration, are among the most popular and useful audio visual formats for library orientation and for bibliographic instruction.

Tape/slide or other audio visual methods for orientation purposes must be library-specific, that is an individual production for each library, for bibliographic instruction, cooperative production - say in use of CARINDEX or CARISPLAN Abstracts - would allow a number of libraries within this network to benefit, but such cooperative productions would be of little use for orientation purposes except for ideas and the lessons learned from production.

There are several often cited reasons for the popularity of tape/slide programmes - and though to a large degree popularity is at present confined to academic and large special libraries, there is no good reason why this format cannot effectively be used in smaller libraries, given the will and resources to produce such programmes.

The often cited advantages of tape/slide presentations have been summarized by Frank Earnshaw of the University of Bradford as follows:

(1)   The cost, in production and equipment, is relatively
        low compared with film or video-tape.

(2)   The presentation is easy to update by replacing one
        or two slides or re-recording part of the commentary,
        whereas an out of date film must be completely remade.

(3)   The equipment is easy to operate and robust in terms
        of normal handling, making it possible for users to
        use equipment with minimal guidance. 4/

4/   Frank Earnshaw, "An Example of Cooperative Development of Library Use Instruction Programmes", in John Lubans, Educating the Library User (New York: Bowker, 1974) pp. 392-393.

To these reasons I would add a further advantage, particularly for the small special library situation:

The flexibility of modern tape/slide synchronized equipment allows the programme to be presented before a group of people or an individual patron may view the programme as his motivation and time schedule dictate. In terms of bibliographic instruction the latter is referred to as point-of-use instruction. In terms of orientation we may refer to it as point-of-demand instruction. The situation I have in mind, and I'm sure you may have encountered it, is when a new member of staff seeks to discover what the library can do for him and requests a full tour of facilities, resources, their organization, services provided, etc. and you are fully engaged on a high priority project or involved in a meeting, have an important appointment, in other words just not available to provide that individualized tour and explanation requested by a potential user. Two options are open: the potential user could be asked to make an appointment for a tour at a future date, in which case his motivation may well be lessened or he may be more occupied with substantive work and commitment of his own at that time. Once the motivation has evidenced, it is foolhardy to let the opportunity pass by and here the other option that you have for this self-motivated individual is to have an introductory tape/slide presentation available at the point or time of his demand. Such a programme will not answer all questions but the potential user with that immediate impulse can be satisfied that the library services are worth further investigation. When the motivation for use of the library is evident do not let the opportunity pass by.

The individualized tour definitely has advantages over a tape/slide presentation in that it can be tailored for the individual and questions can be answered. Also personal contact can be established. None of these can be as effectively present in a tape/slide presentation, though pictures of staff members and an invitation for further questions can and should be built into the programme.

Whether a tour or a tape/slide is chosen as a technique for library orientation, both must begin with a clear statement of purpose and with an outline of the information to be covered: the physical facilities to be described, the services to be described, the resources to be described and the depth of the information to be provided. A library orientation should not be too exhaustive in depth but should serve primarily to motivate the staff member to come to the library when seeking information and to make him feel comfortable in doing so. A tape/slide presentation should be about ten minutes; certainly not more than fifteen minutes and in order to hold attention there should be a fairly rapid change of the slides, say roughly every ten to twenty seconds.

Develop an outline for a library tour; develop a script for a tape/ slide presentation. You may have some ideas on the slides to go with the narration but it is perhaps best to leave some of the script writing and pictures to a professional. It may cost more but a lively and well done project is required. A sloppily done presentation may alienate more poten- tial users than motivate them. Of course, you will wish to retain final editorial decisions on both the script and the pictures.

You might well have to spend $500.00 for such a programme and you may well ask where the money is to come from. I can only suggest that you will have to be creative, convince your department head that orientation acti- vities are an essential component of your library programme and that they must be funded as are salaries and resources. You might also look for ex- pertise within your ministry or another ministry which has an audio visual production unit for assistance at perhaps reduced rates. Equipment might be another $700.00 to $800.00 though such equipment may already exist within your organization.

The informational content of an orientation tour will vary according to the perceived needs of your clientele, but brevity with motivational elements for the potential user should be foremost in the design.

Library Guiding and Signs

A carefully thought out and imaginatively executed system of signs
and graphics can be extremely useful in getting users acquainted with the
system of self arrangements, special files and collections, service points
and so forth.

Graphics that go beyond the verbal listings can do much to untangle
a library's complexities and such complexities are not only characteristic
of large library buildings. In fact to the uninitiated, a relatively
small and overcrowded special library may appear as a jumble of books and
pamphlet boxes, catalogues and files. Clear and effective guiding can go
a long way in destroying the impression that only a librarian can find
anything, gives a sense of order and an impression of organization, so
important if we wish to capture the new user, the new staff member of the
organization. There is a commercial on Jamaican television which includes
the line "You never get a second chance to make a first impression", and
though not an advertisement for libraries, I think it is not without its
applicability to the library orientation situation. A clear and consis-
tent set of signs and labels not only makes for a good first impression
but provides the more experienced user with a means of maintaining his
orientation while in the library. Your potential user and continuing
users are graphically sophisticated and will respond more positively to
the library as a primary source of information if they have the impression
of a well organized set of information resources, clearly labelled in
terms they can understand; details and further instruction can come at a
later date.

Notice Boards

Within the library, the bulletin board should have a prominent
position, visible from the door or information counter. It should provide
an attractive focal point to keep timely information before your library
users. Timeliness is the key word: new acquisitions lists, forthcoming
calendar of events, news clippings about the organization, or the organi-
zation's personnel, cartoons, photographs, new dust jackets and other

attention grabbers. The dynamic bulletin board can invite and encourage
the user, as well as convey direct information.

Use of notice boards outside the library in some prominent place
where people pass often or where they congregate, such as a lunch room,
can also be effective but here is where you really need to design some-
thing that is "eye catching" and "people stopping". Do not include too
much information on external notice boards. Keep the message quick and
to the point and the main message you may be interested in getting across
may simply be one of increasing awareness of the library and maintaining
an identity as well as keeping your clients oriented toward the library.

The use of posters should not be overlooked and again here, graphic
sophistication with a simple yet effective message is important. The
importance of posters in a library's public relations programme was recently
highlighted at the American Library Association's annual conference this
year which included for the first time a poster exhibition, review and
criticism. Under the general theme "Responsiveness: the key to Developing
Library Awareness, Awareness: the Key to Meeting Fiscal Challenges",
posters and other promotional or public relations devices were seen as
critical to the development of awareness, and the development of motivation
to use a library. Invariably, the most effective posters were those with
simple messages, combining a direct informational content with motivational
underpinnings aimed for a specific set of users and whose graphics were
attention-grabbing for the intended audience. The most unsuccessful were
those that no matter how sophisticated and colorful the graphics, tried
to convey too much information that one had to absorb before discovering
what it was that the library was offering that would be of useful benefit
to the reader of the poster. Too much information and the lack of motiva-
tional elements commonly result in ineffective posters, which are not only
a waste of staff time and fiscal resources, but may also build a negative
image of the library.

Library Handbooks and Other Printed Aids

Printed guides or handbooks to the library are another often used technique for the orientation function. A library handbook is the most common example and we are all familiar with either the large, many-paged, photograph-filled and glossy-paper production from some academic libraries complete with floor plans, outlines of the classification system used, extensive descriptions of resource and services, reproductions of borrowing cards, catalogue cards and photographs of a librarian interacting with an obviously satisfied user; or the imitation of this done cheaply but scruffily, mimeographed and stapled with no cut edges, and done on a shoestring budget.

I suggest that neither approach is appropriate for the clientele of your libraries; the former, because it would not be cost effective, the latter because it would probably be alienating to the user.

Nevertheless a printed product of some sort is a necessary component of orientation and of maintaining orientation toward the library. The term "handbook" is not without its implicit meaning: something that can be kept at hand, at home or office, for quick reference to obtain information and should not duplicate information better conveyed through more direct contact between the user and the librarian, whether that be accomplished through individualized orientation tour methods, effective signs and guiding at the point of resources in the library, direct reference service in the traditional sense, or direct information/data supply. The question "what then should such a guide contain?" Certain basic information such as location, hours, staff, telephone numbers, brief description of the basic and special resources and services offered would appear as essential ingredients. It is a good idea to try out suggestions on content, writing style and format with some of your known users, after all, the handbook is to be for them and most of all you need to develop a product that will be used because it is useful. If your ministry or department has a staff manual, it might be a good idea to incorporate descriptive information on the library in it however a separate publication may be useful in addition.

Almost every writer who has anything to say about library bulletins or publications of any sort, stresses that quite apart from the need for the contents to attract the reader's attention, the first impact must come from the cover. If this does not have the necessary effect, the bulletin may go unheeded among other papers competing for attention. This is particularly true of the mimeographed document that looks so much like everything else on one's desk or in one's files.

Covers may take one of several forms, the neatest of which consists of a complete wrap-around sheet such as that used for periodicals generally. A simpler cover consists of a single sheet preceding the text, while the simplest of all, and not strictly speaking a cover at all, is a sheet headed with the bulletin title, name of organization, etc.

Colour is the factor most likely to attract attention and at least a band of colour should be provided. Basically the need is for a good splash of colour to attract attention, and a clear title to permit quick identification. The design is best left to a professional designer for printed colour design, including a distinctive logo, which can become an identification symbol for the library. Bold design, unusual concepts, original typography can all make a cover appealing.

The use of an attractive and consistent logo for all library publications, notices, stationery of all kinds, from letter-heads to "with compliments" slips which may be used when sending photocopies to individuals, literature searches done, and all other written communications from the library is important.

The design and consistent use of such a distinctive logo, coupled with effective information provision can go a long way in keeping your users oriented toward the library, in maintaining their awareness of the library. "It is not enough for special library managers to develop superior, user oriented information services. These services must be promoted. The organization's employees have to be made aware of the information services that are available to them. And top management has to be

kept informed of what it is getting for its information dollar." 5/

In terms of format, a library guide need not be restricted to a booklet type but could also take the form of a bookmark, a desk calendar reminder of basic library information or other such creative formats intended to keep the information readily at hand.

Effective use of an established departmental or ministry-wide newsletter is yet another means at your disposal to keep your clients oriented toward the library. However, the content and style of presentation will largely be determined by the nature and scope of the publication itself. For instance accessions lists, descriptions of new services, networking arrangements and so on, should be avoided if the tone of the publication is light, chatty and staff news oriented; but do not miss the opportunity to bring library information before your users.

I understand that there remains a rather large question among this group as to the actual value and role of user education for your socio-economic practitioners, many of whom, particularly at the higher levels, are so busy or perceive themselves to be so busy that they cannot find time to seek information on their own, and not only prefer but require that they be fed (referring to Maurice Line's analogy mentioned earlier) distilled and highly relevant information or data, without questioning the complex processes, the means and the costs involved for that information to be given them. If librarians or information officers are in sufficient quantity to liase directly and effectively distil information for their primary clients, there is little need for bibliographic instruction as a component of user education: librarians should know how to do it from the beginning. However, if there is a second cadre of research officers, these may be a prime target for bibliographic instruction.

5/ John Kok, "Now that I'm in Charge, What do I do?: Six Rules about Running a Special Library for the New Information Manager", Special Libraries, vol. 71, no. 12, December, p. 525.

I myself would like to see a programme of user education with quite a
different emphasis from that of this workshop. I would like to see a
seminar bringing major decision-makers together with information specialists
so that the one group can better understand the other. This is still user
education but not at the level of research or utilization skills, rather
at the levels of defining the information needed for socio-economic planning,
the development of practitioner's skills in clearly articulating what those
needs are and the development of an awareness of the costs and cost effec-
tiveness of information services.

But I have strayed away from my major theme - orientation and
reorientation - capturing and maintaining a user. And this is what I think
the whole orientation process is about - initially capturing and then main-
taining library awareness.

Within the mix of your users' information seeking behaviour will be
those who hunt, those who gather and those who demand the breast-fed
platter. In general, user education techniques will have to take all into
consideration to varying and lesser degrees, though an initial orientation
and a continuing awareness is an essential feature of your library's total
programme.

ADDITIONAL-SUGGESTED READINGS

AIYEPEKU, W.O. The Perception and Utilization of Information by Policy-Makers in Nigeria. Lagos: National Library of Nigeria, 1980.

    A report of a major research study among the federal civil service;
    the author has written extensively on the information needs and
    uses of socio-economic practioners in Nigeria and the several user-
    oriented studies are worth perusing within the context of DEVSIS
    and CARISPLAN.

CAREY, R.J.   Library Guiding: A Program for Exploiting Library Resources.
London: Clive Bingley, 1974.

COPLAN, Kate. Effective Library Exhibits: How to Prepare and Promote Good
Displays. New York: Oceana, 1974.

HARDESTY, Larry. Use of Slide/Tape Presentation in Academic Libraries.
New York: Jeffrey Norton, 1978.

    Includes a special section "Sound/Slide Presentations: Six Faults" by
    John Murphy and also a lengthy bibliography on planning and production
    of slide/tape presentations.

POLLET, Dorothy and Peter Haskell. Sign Systems for Libraries: Solving
the Wayfinding Problem. New York: Bowker, 1979.

    A well illustrated collection of articles covering in part ideas for
    a small library.

U.S. FEDERAL LIBRARY COMMITTEE. Guidelines for Library Handbooks. Bethesda;
ERIC Document Reproduction Service, 1972. ED 067 137.

    A clearly written document helpful for designing a handbook, portions
    of which are particularly relevant for the smaller governmental library,
    though adaptations necessary for developing countries. Renford and
    Hendrickson refer to it as "required reading for every handbook designer".
    (Op. Cit., p. 45).