

Using Information Literacy Instruction Techniques in Alma Training

IGELU 2022 (Virtual/Dora Stoutzker Hall)

Jharina Pascual
Electronic Resources Acquisitions Librarian, University of California Irvine
13 September 2022

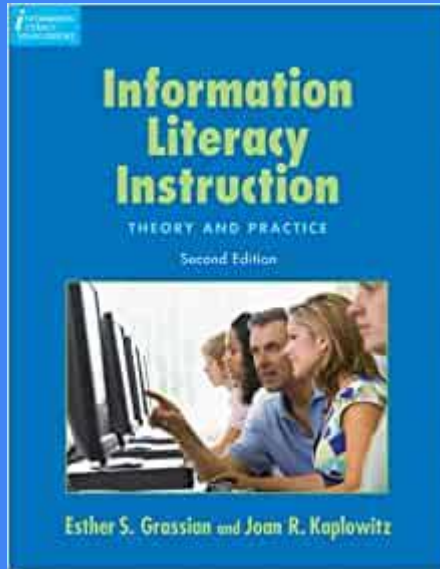
E-resources management concepts

- TERMS (Emery, Stone, McCracken)
- “Core Competencies for Electronic Resources Librarians” (NASIG)

- Carter/Trail:

1. Overview of discovery and access environment
2. Common points of failure
3. Authentication and authorization
4. OpenURL and link resolvers
5. Differences and similarities between access for OA/free resources and licensed/paid resources
6. Discovery index content, activations, and linking mechanisms
7. Metadata sources, quality, and impact on access
8. Detailed interaction between link resolver, discovery index, discovery layer, and LMS
9. Distinguishing isolated issues from widespread problems
10. Effective communication with system vendors and content providers

Mental Models and the Integrated Library System



Grassian, Esther S., and Joan R. Kaplowitz. 2009. *Information Literacy Instruction: Theory and Practice*. 2nd edition. New York: Neal-Schuman.

*Image from Amazon.com

UC Irvine Libraries: Hierarchies and staffing

- A. UCI/UC-systemwide
- B. Librarians/Staff
- C. Technical services/Public services
- D. Research/Operational

UC Irvine - Land acknowledgement

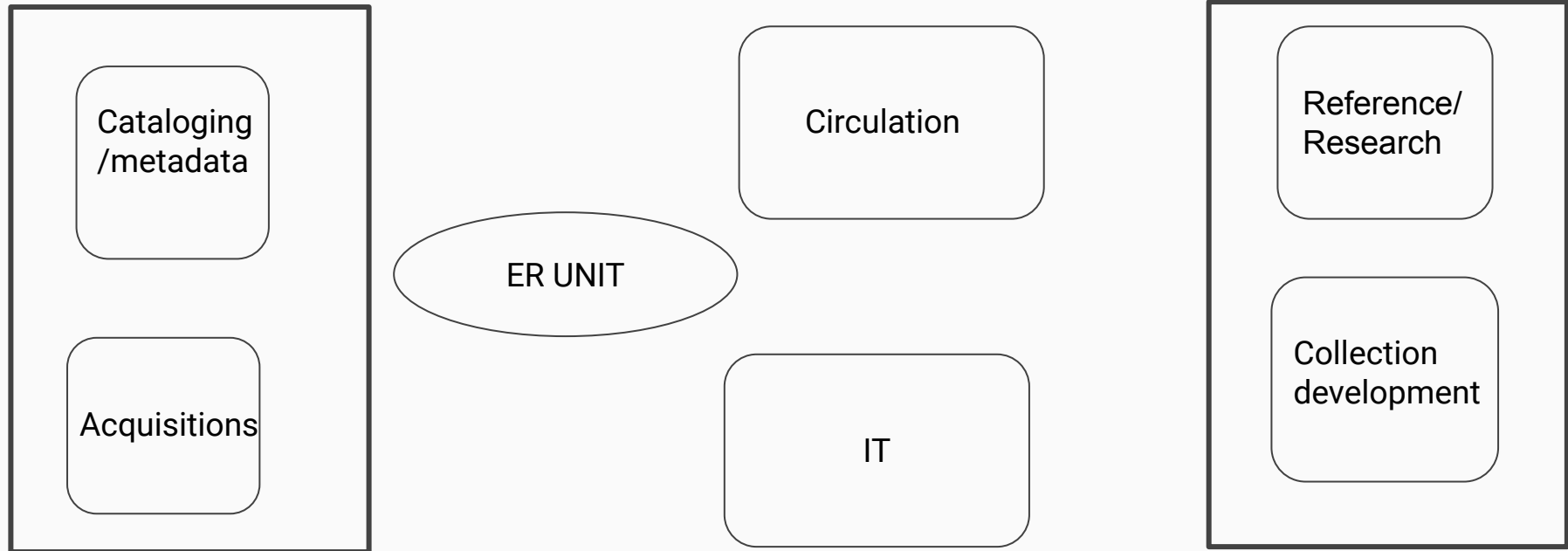
“The UCI Libraries acknowledge our presence on the traditional, ancestral, and unceded territory of the Acjachemen and Tongva peoples. And we respectfully honor and recognize the original and current caretakers of this land, water, and air: the Acjachemen and Tongva peoples and all of their ancestors and descendants, past, present, and future. Today this meeting place is home to many Indigenous peoples from all over the world, including UCI faculty, students, and staff, and we are grateful to have the opportunity to live and work on these homelands.”

- <https://diversity.lib.uci.edu/land-acknowledgement>
- <https://www.humanities.uci.edu/history/land-acknowledgement>
- <https://admission.universityofcalifornia.edu/tuition-financial-aid/types-of-aid/native-american-opportunity-plan.html>
- <https://www.universityofcalifornia.edu/about-us/information-center/disaggregated-data>

Mental Models: iii Millennium/AntPAC

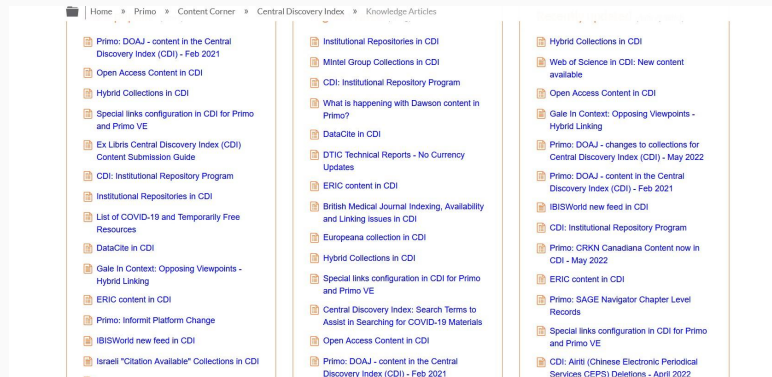
- Print-centric
- Title-level search-centric
- Bibliographic record-centric
- Modules operate independently
- Departmental silos
- Library catalog (not “discovery”)
- Systemwide catalog separate from the campus catalog
- Limited article- and database-level searching

UC Irvine Libraries: Silos



Mental Models: Alma/Primo

- Interconnected licensing, acquisitions, metadata functions
- Electronic resource- centric
- Database- centric
- Web-scale discovery
- Article- and chapter-level searches
- OpenURL/Seamless access

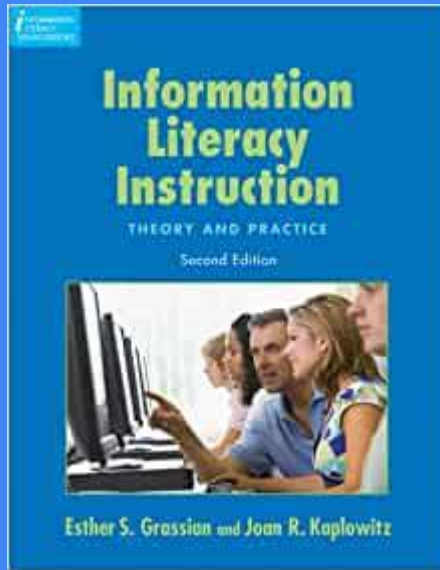


Migrating to new
systems/models/
frameworks =



"Panic Alarm sign, toilet, NYU Campus, Personal Democracy Forum, New York City, NY, USA" by gruntzooki is licensed under CC BY-SA 2.0. To view a copy of this license, visit <https://creativecommons.org/licenses/by-sa/2.0/?ref=opensearch>.

Theories of Learning



Grassian, Esther S., and Joan R. Kaplowitz. 2009. *Information Literacy Instruction: Theory and Practice*. 2nd edition. New York: Neal-Schuman.

*Image from Amazon.com

Cognitive model of learning

- Recognizing patterns:
workflows, structures
- “Discovery” method
- Holistic training



- Confidence,
- Critical thinking skills
- Flexibility
- Construction of meaning:
social, personal

Presentation (advanced organizing)

- Introduction to Alma/Primo structures, metadata, and inventory
- Draft procedures
- Analogies to SFX/Millennium/AntPAC
- Comparisons to Google, Amazon for web-scale discovery

Application (1)

- Group discussion/decision-making
- Allow time for reflection and feedback

Behaviorist model of learning

- Task analysis (chunking)
- Modeling behavior
- Active learning
- Modifications (corrections through feedback)
- Repetition/practice
- Trial and error

Application (2)

- Modeling examples/workflows
- Hands-on practice of draft procedures
- Mastering procedures one by one
- Mastering different functions

Presentation - Application- Feedback

Feedback

- Regular individual and group meetings
- Survey
- Inter-unit and inter-departmental communication
- Informal assessment of procedures and workflows

Assessment

Assessment: workload for managers

- Meetings and presentations require time to prepare
- Procedure writing must be prioritized
- Manager cannot control when staff have sufficient confidence in their skills to move forward
- Manager may need to make unpopular decisions about workflows
- Manager may be required to justify staff time on surveys and assessment

Assessment: presentations and meetings

- Conceptual frameworks and analogies support understanding of ILS
- Meetings (individual/group/inter-unit or department) are helpful for new procedures/workflows/policies
- Real-time advice on improving workflows/training methods

Assessment: staff learning and productivity

- Independence and increased productivity in routine work
- Independent decision-making in e-resources troubleshooting
- Drafting new procedures
- Identify missing areas of training

Assessment: complex tasks and technology

- Flexibility/adaptability to Alma/Primo changes
- Build and complete (non-routine) project work
- Integration of new non-ILS technology over time

Assessment: migration priorities and the library mission(s) (1):

<https://diversity.lib.uci.edu/diversity-statement-and-plan>

As the heart of UCI's academic community, the UCI Libraries celebrates the diversity of our patrons and **staff**

We do this by:

- **Striving to recruit and retain a diverse and inclusive workforce**
- **Developing diversity awareness and sensitivity among library employees**
- **Promoting diversity values in our services to users**
- **Creating a welcoming and inclusive environment in our physical and virtual locations**

FOCUS AREA I: ENHANCING DIVERSITY EFFORTS IN THE RECRUITMENT AND RETENTION OF LIBRARIANS AND STAFF

- *Goal 1: Increase the diversity of applicant pools.*
- *Goal 2: Promote the importance of evaluating candidates' contributions and commitment to diversity and inclusive excellence during the recruitment process.*
- **Goal 3: Foster a welcoming environment for prospective candidates by being open to diversity and inclusive excellence.**
- *Goal 4: Incorporate diversity and inclusive excellence goals in the new employee orientation process.*
- **Goal 5: Promote contributions to diversity as an employee retention strategy**

The humanist model/learning styles and staff training

- Learner-centered teaching
- Respect for different learning speeds/styles
- Prioritizing employee engagement and retention
- Identifying areas where staff are in need of more support to meet library goals
- Surfacing technical services staff knowledge and skill-sets

Assessment: migration priorities and the library mission(s) (2)

Short-term
solutions

VS

Long-term
progress

“The skills staff have obtained from years of data and metadata work are critical for creating the next iteration of access and discovery services. For most of us there is no clear path. It may not even be possible to know an exact path to take to create innovative technical services work.”

Collins, Maria, and Kristen Wilson. 2018. “An Agile Approach to Technical Services.” *The Serials Librarian* 74, no. 1-4: 9–18.
<https://doi.org/10.1080/0361526X.2018.1443652>.

Thank you!

Contact me:

Jharina Pascual

jharinapascual@hotmail.com

@librarypj

University of California,
Irvine Libraries

United States

Breeding, Marshall. 2007. "Next-Generation Library Catalogs: Chapter 1 Introduction." *Library Technology Reports*, July/August. <https://librarytechnology.org/document/18344>.

Carter, Sunshine, and Stacie Trill. 2017. "Essential skills and knowledge for troubleshooting e-resources access issues in a web-scale discovery environment." *Journal of Electronic Resources Librarianship* 29 (1): 1-15. doi:<https://doi.org/10.1080/1941126X.2017.1270096>.

Collins, Maria, and Kristen Wilson. 2018. "An Agile Approach to Technical Services." *The Serials Librarian* 74 (1-4): 9-18. doi:<https://doi.org/10.1080/0361526X.2018.1443652>.

Emery, Jill, Graham Stone, and Peter McCracken. 2017. *TERMS ver2.0 Introduction*. March 24. Accessed September 6, 2021. <https://library.hud.ac.uk/archive/projects/terms/terms-ver2-0-introduction/>.

Grassian, Esther S., and Joan R. Kaplowitz. 2009. *Information Literacy Instruction: Theory and Practice*. 2. New York, NY: Neal-Schuman.

Hulseberg, Anna. 2016. "Technical communicator: A new model for the electronic resources librarian?" *Journal of Electronic Resources Librarianship* 28 (2): 84-92. doi:<https://doi.org/10.1080/1941126X.2016.1164555>.

Morales, Jessica M., and Christina A. Beis. 2021. "Communication across the electronic resources lifecycle: a survey of academic libraries." *Journal of Electronic Resources Librarianship* 33 (2): 75-91. doi:<https://doi.org/10.1080/1941126X.2021.1913841>.

Pascual, Jharina, and Sarah Wallbank. 2021. "Analyzing Workflows and Improving Communication across Departments: A Quick and Simple Project Using Rapid Contextual Design." *The Serials Librarian* 80 (1-4): 11-18. doi:10.1080/0361526X.2021.1877996.

Rathmel, Angela, Liisa Mobley, Buddy Pennington, and Adam Chandler. 2015. "Tools, Techniques, and Training: Results of an E-Resources Troubleshooting Survey." *Journal of Electronic Resources Librarianship* 27 (2): 88-107. doi:<https://doi.org/10.1080/1941126X.2015.1029398>.

Renaville, François, Laurence Richelle, and Paul Thirion. 2013. ""Where are my Marc records?": Librarians' perception of discovery tools." *IGeLU 2013 Conference*. Berlin. Accessed April 5, 2019. doi:<http://dx.doi.org/10.13140/RG.2.1.5096.2087>.

Richardson, Hillary A.H. 2013. "Revelations From the Literature:." *Computers in Libraries*, May. <https://www.infotoday.com/cilmag/may13/Richardson--How-Web-Scale-Discovery-Has-Already-Changed-Us.shtml>.

Sutton, Sarah, Eugenia Beh, Steve Black, Clint Chamberlain, Susan Davis, Katy Ginanni, Selden Lamoureux, Sanjeet Mann, Cynthia Porter, and Taryn Resnick. 2021. "Core Competencies for E-Resources Librarians." *NASIG*. April 5. Accessed September 6, 2021. <https://www.nasig.org/Competencies-Eresources>.