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Library Orientation Practices in Special Libraries

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Library Orientation Practices in Special Libraries

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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.

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3 The planning, structure, and delivery of library orientations and other library training
4 sessions in academic and school library settings have been explored extensively in the
5 academic and practitioner literature (for example Goodfellow & Galloway 2018, Rust &
6 Brown 2018, Brown 2017, Rod-Welch 2017, Goldman et al 2016, Craft & Ballard-
7 Thrower 2011, Currie 2009, Mills & Mitchell 2009, Rhoades & Hartsell 2008). The topic
8 of library orientations in special libraries, however, has received very little attention. This
9 article explores library orientation practices in special libraries and information centres
10 with the goal of surveying current practices and identifying guidance for successful
11 orientation program design and delivery.
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14
15 Special libraries and information centres offer information and knowledge services
16 related to a specialized subject or to a specialized population and are found in a variety
17 of sectors (for-profit, not-for-profit, and public). There are sub-categories within the
18 special libraries field, including medical libraries, law libraries, government libraries, and
19 corporate libraries. Special libraries may exist within a larger academic or public library
20 system. Special libraries' mandates and services are always guided by those of their
21 host or parent organization, which leads to significant variation in their collections and
22 services. Despite these differences, special libraries have many shared concerns and
23 practices, and marketing their collections and services is one of these.
24
25

26 **Literature Review**

27
28 While there are large bodies of literature on orientations inside and outside of the library
29 sectors, very few articles on library orientations in special libraries are available.
30 Because of the lack of resources on library orientations in special library settings,
31 literature on both academic library orientation sessions and corporate employee
32 orientations were examined. The literature on corporate employee orientations was
33 generally written from a human resource management perspective and is relevant
34 because special libraries may be given the opportunity to present as part of a larger
35 corporate orientation session.
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37

38 **Corporate Employee Orientation Sessions**

39
40 Because special libraries are often situated within larger organizations literature on
41 corporate employee orientation sessions was examined. The focus of the orientation
42 sessions featured in this literature is as a tool for integrating new employees into the
43 workplace. This is different from the type of orientation examined in this study which is
44 meant for users of the special library rather than employees of the special library.
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48 Understanding the theoretical foundations of new employee orientation can help special
49 librarians understand how to integrate their library orientations into their host
50 organization's larger new employee development programs. New employee orientations
51 have two objectives: socialization (the process through which new employees become
52 integrated into their workplace culture) and training (the mechanisms through which
53 employees acquire the skills and competencies required to complete their workplace
54 tasks) (Herrington 1998, Holton III 1996). Socialization has been linked to higher
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3 satisfaction and better employee retention rates while skill and competency
4 development is required for employees to perform their work roles (Lewis, Thomas &
5 Bradley 2012, Rocchetti 2006, Holton III 1996). Library orientation generally focus on
6 training by providing clients with information about library resources that can assist them
7 in performing their jobs, but they may also be linked to socialization. For example,
8 special librarians may frame their library orientations in terms of an evidence-based
9 organizational culture.
10

11 12 **Academic Library Orientations** 13

14
15 Library orientations share the socialization and training objectives of organizational
16 (typically corporate) orientation and new employee development programs. Library
17 orientations seek to socialize library users into the skills and competencies required to
18 navigate the modern information environment. Several authors have linked participation
19 in library orientation programs with later collection and service use and improvements in
20 information literacy skills (Goldman et al 2016, Lei Hsieh & Holden 2010).
21

22
23 The vast majority of library instruction literature focuses on the experiences of students
24 (secondary or post-secondary) offered by school or academic librarians. Several
25 authors, however, have explored the experiences of adults (Lange 2015, Turcotte 2015,
26 Hoyer 2011, Nielsen & Borlund 2014, Lai 2011). One example of an article that
27 addressed special library orientations was Hurst's (2003) article about the development
28 of library services for campus administrators and described the development of an
29 orientation session for this population. The orientation sessions considered specific
30 information seeking behaviour among this population who would use library services to
31 fulfil work tasks rather than for research or study in ways that align with adult learning
32 research. In particular, it was noted that they sound information in order to find answers
33 to specific questions, worked to tight deadlines, searched for information on behalf of
34 others, and were unfamiliar with the library's research resources (Hurst 2003, p. 232).
35 Special libraries would primarily serve adult clients, most of whom would access library
36 services in order to fulfil specific work or professional tasks such as the preparation of a
37 work report or presentation, responding to a question from a client or manager, or
38 engaging in professional development or training.
39
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42
43 Fostering partnerships in order to develop, promote, and deliver library orientations was
44 another theme in the literature. Goldman et al (2006) and Mills and Mitchell (2009)
45 discussed creating a team of people with a variety of skillsets to develop a revised
46 library orientation program. Rhoades and Hartsell (2008) discussed collaboration
47 between the library and the university orientation office. Rust and Brown (2018)
48 emphasized the importance of collaborating with non-academic departments in
49 universities. Finally, the most commonly mentioned partners in the academic library
50 literature were university faculties and departments or individual faculty members, who
51 partnered with library staff to incorporate library instruction into the curriculum (Dhawan
52 & Chen 2014). The survey included a question about partners in special library
53 orientations to determine what types of partnerships were created to develop or
54 promote orientation sessions.
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4 Case study articles tended to describe situations in which librarians redesigned their
5 library orientation programs in response to external or internal forces. Motivations for
6 library orientation redesigns included the reduction in available time for library
7 instruction (Lange 2015), reduced availability to engage on the part of partners (for
8 example, difficulty in scheduling classroom visits) (Diekema, Gerrity & Mitchell 2019,
9 Brown 2017), and a desire to improve the effectiveness of sessions (Witek & Spirito
10 Dalgin 2019). The survey included a question about whether participants had recently
11 modified their approach to new client orientations in order to understand whether
12 special library orientations are in a state of transition and to determine if any of the
13 change forces impacting academic libraries were also impacting special libraries.
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16
17 There was also a large collection of articles focused on educational theories,
18 approaches, and techniques informing library orientation design and delivery in
19 academic libraries. Common library orientation activities include group activities,
20 resource demonstrations, and tours (Goodfellow & Galloway 2018, Brown 2017, Rod-
21 Welch 2017, Goldman et al 2016, Lange 2015, Rice & Gregor 2013, Thrower 2011,
22 Hurst 2003). Some authors focused on types of learning, such as cooperative learning,
23 active learning, learner-centered programming, and problem-based learning (Brown
24 2017, Simard 2009), while others explored specific instructional methods and
25 techniques. These methods included online learning modules (Parramore 2019, Goldman et al
26 2016, LeMire 2016), flipped classes (Rodriguez 2016), the inclusion of games,
27 competitions, and escape rooms (DiNardo & Snyder Broussard 2019, Kirk 2019, Veach
28 2019), choose-your-own adventure flipbooks (Korber & Shepherd 2019), and
29 collaborative speed drawing (Brier & Lebbin 2015). Although the content of client
30 orientation sessions differs from library to library, a multiple-choice question offering
31 orientation activities featured in these academic library case study articles was included
32 in the survey. Because many of the techniques used in academic libraries focused on
33 information literacy, special librarian participants were also asked whether they included
34 information literacy training in their orientation to determine whether this key focus of
35 academic libraries' orientation sessions also informs special library orientation session
36 design.
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41 An examination of the literature on library orientations reveals a key gap regarding
42 library orientation practices in special libraries. There is a lack of research or practitioner
43 literature available to help special library workers to understand what practices are
44 currently being employed in the field and what strategies have proven successful in the
45 design and delivery of orientation sessions. The literature did, however, reveal several
46 themes that were built into this study's survey: (1) reasons for library orientation
47 program redesigns, (2) the importance of partnerships in orientation design and
48 delivery, and (3) the tools and techniques used in the delivery of orientation sessions.
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51 **Methodology Selection**

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

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3 It could not be taken for granted that special libraries offer library orientations. As
4 outlined in the participants section, many special libraries are staffed by a single library
5 worker who must respond to the information needs of hundreds of clients. 89.1% of
6 participants reported that they offered orientations with a few reporting that they had
7 initiated the practice of offering orientations to clients.
8
9

10 The timing and structure of orientation sessions offered by participants varied. Twenty-
11 six participants reported offering orientation sessions whenever new clients arrived at
12 the host organization while seven offered self-paced or online training available to
13 employees at any time in addition to scheduled orientations and training. Higher
14 frequency scheduling (weekly or monthly) of orientation sessions was more commonly
15 selected than lower frequency scheduling (annually or semi-annually). Half of the
16 participants in the study (27 participants) reported orientation sessions of 30 minutes or
17 less.
18
19

20 **Redesigning Library Orientations**

21

22 The literature review suggested that approaches to library orientation sessions in
23 academic libraries has been changing. Participants were asked if they had modified
24 their approach to new client orientations recently and the reasons for these changes.
25 This was a free text response and was not mandatory. Fourteen participants indicated
26 that they had not modified their approach and 23 left the question blank. The final
27 question in the survey asked participants to share other comments about new client
28 orientation. As with the other non-mandatory free text question, the majority of
29 participants either left the question blank (28 participants) or simply wrote that they had
30 no comments (6 participants). Some shared themes emerged across these two
31 questions, so the responses to both of these questions will be presented together here.
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35 The first theme that emerged was challenges related to running orientation programs.
36 The first challenge was identifying and reaching new clients. Not all participants had
37 partnerships in place with human resources or other organizational units that send lists
38 of new employees to the library. Those that did not receive new employee lists had to
39 resort to multipronged promotion approaches to attract new potential clients to library
40 orientation session:
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43 “We advertise the monthly sessions via all-building email blast, rotator on our
44 website, and stand-up easel posters in the lobby of our main building. We also
45 advertise the sessions as "coffee and questions" and we serve coffee and
46 snacks.”
47
48

49 Some participants reported recently developing new arrangements within the
50 organization to make library orientation programs mandatory for certain user groups. In
51 some cases, library orientations are embedded in organization-level orientation
52 programs, in some they are part of departmental or team orientations (for example,
53 orientations for new interns), and in other cases library orientations are incorporated in
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3 specific training sessions offered by other units in the organization (for example, one
4 participant reported that the library presents as part of a Record Sealing clinic).
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7 A second challenge that was discussed by participants was that of creating efficiencies
8 in the orientation process. Many participants reported conducting library orientations
9 whenever new employees arrive, which although it allows for individual attention and
10 relationship building, creates significant work for library staff. One approach that
11 participants have taken to address this issue is to use technological tools to support
12 library orientations. Several participants reported switching to online training videos and
13 webinars to facilitate group sessions for staff across work locations and to save staff
14 time.
15

16
17 Timing of orientation sessions was another discussion topic. Several participants
18 reported waiting between two weeks and a month after a new employee started with the
19 organization in order to allow the library client time to develop a sense of the information
20 needed to fulfill their new work role. Multiple participants also reported staggering the
21 library orientation process. They initiated contact with new clients through an
22 introductory email or preliminary meeting with new library clients and then providing
23 either structured training at later dates or ad hoc sessions based on clients' requests:
24
25

26 "For new staff orientations, the entire SL team meets to introduce themselves
27 and their specialty. Then only our director and the librarian who will be most
28 directly supporting the new staff member have a longer conversation about the
29 type of support we provide."
30

31
32 "I schedule a calendar reminder to follow-up with new employees in six months,
33 to ask if they have any questions; if they are finding anything confusing; if they've
34 had any trouble using library resources, etc."
35

36
37 "We receive a list of all new hires monthly and email them an overview of our
38 services along with an invite to the orientation (we provide three 30 minutes
39 sessions to address global time zones)."
40

41 Several participants advocated this staggered approach including smaller group or
42 individual sessions because they encouraged active participation and could be more
43 closely tailored to new clients' needs. Shorter and more tailored sessions were, for
44 some participants, direct responses to low participation rates in longer, large group
45 orientation sessions.
46

47
48 Another theme that emerged from several participants' responses was that of the fluid
49 nature of library orientations. In addition to tailoring library orientations to the information
50 needs of different client groups, participants also reported modifying library orientations
51 based on the latest tools, trends, and developments in libraries, information access, and
52 retrieval.
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3 A final topic raised by participants was the value of library orientations. The goal of the
4 library orientation is to inform library clients of the library resources available to them in
5 order to encourage their use. Librarians cannot assume that new employees will be
6 aware of these resources: "Some percentage of the customers are always astonished at
7 the resources the library presents to them". One participant reported that even if only a
8 small portion of new employees participate in the orientation sessions, those that do are
9 likely to become regular library users.
10

11 12 **Partnerships**

13
14 Building partnerships within the university community was described as a success factor
15 for academic libraries. A question was therefore included in the survey to determine if
16 partnership were also important to the development and delivery of special library
17 orientations. This question allowed for free text responses in order for participants to
18 elaborate upon the types and nature of partnerships undertaken. 44 of the 55
19 participants responded to the question. The most common response was that the library
20 did not engage in any partnerships in order to run or prepare orientation sessions (28).
21 The most frequently cited partner was the human resources (HR) teams. In some
22 cases, the partnership was created for the library to receive lists of new employees
23 which the library would then use to organize their own orientations. In others, the library
24 was included in an HR-organized orientation program. Some participants identified
25 particular partnering units within their organizations. These libraries offer orientations
26 only to employees within units that are most likely to use their services. These
27 partnerships allow the library to tailor their orientations based on the needs of these
28 client segments. Other partners included teams offering various types of management
29 or membership services, the organization's training, corporate learning or talent
30 development team, and the information technology department. Partnerships were also
31 identified as helpful in promoting library orientation sessions. Libraries depended on
32 referrals by human resources departments and managers and supervisors as key
33 methods of attracting participants in library orientations.
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39 **Library Orientation Delivery Tools and Techniques**

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41 The academic library literature offered descriptions of numerous teaching techniques
42 and tools used in either library orientations or bibliographic instruction sessions. A list
43 was created based on the types of techniques and approaches found in the literature to
44 determine which were used in special library orientation sessions. Participants were
45 given the opportunity to select multiple options and very few respondents selected only
46 a single type of activity. In cases where only a single activity was selected, live resource
47 demonstration, physical tours, and links lists, handouts, or tip sheets were the most
48 commonly selected. The most selected options among all participants were: (1) live
49 resource demonstrations (36), (2) physical tours (27), (3) question and answer
50 sessions, and (4) handouts / tip sheets (22).
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54 Participants were asked if they include information literacy training in their orientations.
55 The majority of respondents (63.5%) reported that they did not offer information literacy
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3 training. 13.5% reported that they do offer information literacy training. The remaining
4 23.1% answered 'maybe' suggesting that elements of information literacy training may
5 be included in the training, but that they were not a standard component of orientations.
6
7

8 **Discussion**

9

10 This study sought to understand the library orientation practices of special libraries and
11 information centers and to determine whether the library orientation practices of
12 academic libraries were applicable. The survey sample was small but reflected the
13 variations in size, foci, and client bases that characterize special libraries. The results
14 revealed that library orientations are taking place in special libraries, but there is no
15 consistent approach to library orientation delivery. Even within a single library, multiple
16 approaches to library orientations are taken based on client availability, demand, and
17 information needs observations of library staff. For example, a special library may begin
18 the library orientation process with a welcome email for new host organization
19 employees and then offer both regularly scheduled structured group orientation
20 sessions and ad hoc library instruction sessions tailored to different teams or to highlight
21 different library products or services.
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23

24
25 How applicable the literature on library orientations are to special libraries cannot be
26 easily answered from this survey. The findings suggested that there are some structural
27 differences in the way that academic and special libraries offer library orientations, but
28 because of the differences that exist between special libraries, some special libraries
29 orientation sessions may more closely resemble academic library orientations than
30 those of other special libraries. Special libraries that offer library orientations for interns
31 in research-focused organizations offer in-person, group training sessions that closely
32 resemble the library orientation sessions than special libraries in the corporate sector
33 that offer ad hoc library orientations to new host-organization employees on a one-on-
34 one basis as they arrive.
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36

37 **Implications for Practice**

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39
40 The responses to this survey revealed information about key practices and challenges
41 that can be used by special library practitioners seeking to implement or redesign a
42 library orientation program in their library. Some of the key findings are highlighted
43 below.
44
45

46 **Partnerships.** A useful practice among participants was to develop a partnership with
47 the human resources department in order either to receive lists of new employees when
48 they arrived in order to contact them to participate in library orientations or to be
49 included in the HR organized new employee orientation program.
50

51 **Technology Use.** Special libraries were very strategic in their use of technologies.
52 Some used technologies to create training and orientation opportunities for remote
53 workers. Others used technology to pre-record elements of their training and orientation
54 in order to save time. Some revised their training approach to ensure that new clients
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3 would be able to sit at workstations and actively engage in learning activities during their
4 training sessions.
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7 **Orientation Timing.** Delaying the library orientation is a strategy to ensure that new
8 clients get the most out of the session(s). Several participants reported waiting between
9 two weeks and a month after a new employee started with the organization in order to
10 allow the library client time to develop a sense of the information needed to fulfill their
11 new work role. Multiple participants also reported staggering the library orientation
12 process. They initiated contact with new clients through an introductory email or
13 preliminary meeting with new library clients and then providing either structured training
14 at later dates or ad hoc sessions based on clients' requests.
15

16
17 **Customization Based on Client Segment.** Market segmentation was used to design
18 orientation sessions, with many special libraries creating orientations that were tailored
19 to clients based on their unit/division or employee type (i.e. sessions designed for
20 interns).
21

22
23 **Ongoing Outreach.** The special library orientation is one point in an ongoing exchange
24 between special libraries and their clients. Special librarians reported promoting the
25 library orientation and training sessions through multiple channels (going through HR,
26 divisions, promotional materials in public spaces, introductory emails, etc.). They then
27 followed-up with new employees to see if they needed any additional training or
28 support.
29

30
31 **Fluid Design and Delivery.** Special libraries approach to orientation sessions isn't
32 static. In addition to tailoring library orientations to the information needs of different
33 client groups, participants also reported modifying library orientations based on the
34 latest tools, trends, and developments in libraries, information access, and retrieval.
35

36
37 **Mixed Delivery Tools and Techniques.** Special libraries employ a wide range of
38 techniques and tools in their orientation tours. The most selected options among
39 participants were (1) live resource demonstrations (72%), (2) physical tours (54%), (3)
40 question and answer sessions (54%), and (4) handouts / tip sheets (44%).
41

42
43 **Library Orientations Are Useful.** The goal of the library orientation is to inform library
44 clients of the library resources available to them in order to encourage their use.
45 Librarians cannot assume that new employees will be aware of these resources: "Some
46 percentage of the customers are always astonished at the resources the library
47 presents to them". One participant reported that even if only a small portion of new
48 employees participate in the orientation sessions, those that do are likely to become
49 regular library users.
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51 **Limitations and Opportunities for Future Research**

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54 This study represents a starting step in an exploration of library orientation practices in
55 special libraries. The key limitation of this study was the low response rate leading to a
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3 small sample size. A larger sample of special libraries would be needed in produce a
4 quantitative analysis of the prevalence of practices with an acceptable degree of
5 statistical significance. Alternatively, smaller samples of special libraries organized by
6 characteristics such as size or type (e.g. corporate libraries, law libraries, medical
7 libraries) could be conducted to determine if distinctive trends exist within these special
8 library types.
9

10
11 Other methodologies may also be employed to discover different aspects of library
12 orientations in special libraries. A qualitative study to elaborate on the trends discussed
13 in this paper using focus groups or in-depth interviews would help to validate and clarify
14 results. Methods that offer detailed investigations into the practices within a single or
15 small set of special libraries such as case studies could offer insights into the design
16 and delivery of special library orientation sessions.
17
18

19 Finally, the study focused on the library orientation practices of special libraries but not
20 on their results. Future research may focus on the impact and effectiveness of these
21 sessions from either the library or the library clients' perspectives.
22
23

24 **Conclusion**

25
26 This study addressed a gap in the academic and practitioner literature regarding the
27 library orientation practices of special libraries and information centers. Understanding
28 what practices are currently being deployed in the field can benefit several
29 stakeholders. This knowledge can assist current practitioners in designing and
30 delivering library orientations in their own organizations. It can also assist professional
31 associations and LIS educators in preparing training materials that address the trends
32 and challenges identified in library orientation practices. This article serves as a starting
33 point for investigating this subject. Several future research directions are possible. A
34 first possibility is to compare library orientation practices between types of special
35 libraries or between special libraries in different geographic regions. A comparison
36 between the orientation practices of special libraries that serve local clients versus
37 those that serve geographically distributed clients would also be possible with a larger
38 participant set and questions that target these client factors. In addition, this study only
39 explored the structure of orientation sessions. A deeper examination of the content and
40 delivery methods may provide useful insights for practitioners and researchers. Finally,
41 this study did not look at the impact of library orientations on end-users. Client
42 perceptions of the effectiveness of delivery methods would also be useful to
43 practitioners within and beyond the special library community.
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