Model statement of objectives for academic bibliographic instruction: Draft revision

Prepared by the ACRL/BIS Task Force on Model Statement of Objectives

Lori Arp, Chair

A *proposed revision of the 1979 model statement.*

The following draft document represents the efforts of a special Task Force within ACRL's Bibliographic Instruction Section to review and revise the 1979 Model Statement of Objectives for Academic Bibliographic Instruction. This revision was undertaken in the spirit of updating the original Statement so that it would more closely reflect current thinking and trends in bibliographic instruction. The original statement was intended to provide guidance in the development of instruction programs as well as to stimulate discussion about BI in the profession. Similarly, the revision seeks to achieve the same goals. While the document draws on the 1979 Statement, its scope has been expanded to encompass not only undergraduate instruction needs, but other user groups within academic libraries. It also differs from its predecessor in that its focus is on the conceptual processes of using information, rather than on tool specific or institution specific detail.

Those of us who have observed the growth of this document are excited about this new direction and we would like to share it with the profession through an open hearing in San Francisco. By holding this hearing we hope to confirm that the document represents the instructional needs of the Section so that it may then move forward in the process of becoming an official guideline of the Section. This work furthers our mission of developing policy statements that provide direction for instruction librarians. The hearing has been scheduled for Monday, June 29, 11:00 a.m.–12:30 p.m. The room location will be listed in the ALA schedule.

Readers are referred to: 1) "Towards Guidelines for Bibliographic Instruction in Academic Libraries," *C&RL News*, May 1975, pp. 137–39, 169–71; 2) "Guidelines for Bibliographic Instruction in Academic Libraries," *C&RL News*, April 1977, p. 92; and 3) *Bibliographic Instruction Handbook*, published by ACRL in 1979, for a review of the original Model Statement of Objectives and Guidelines for Bibliographic Instruction. We welcome your written comments on the revision. Please address these to: Betsy Baker, BIS Chairperson, Northwestern University Library, 1935 Sheridan Road, Evanston, IL 60201.

The Bibliographic Instruction Section would like to acknowledge the members of the Task Force: Lori Arp (chair), Barbara Beaton, Joseph Boissé, Julie Czisny, David Ginn, Roland Person, Jan Rice, and Beth Woodard.—*Betsy Baker, Chair, BIS.*

Introduction

The primary purpose of the Model Statement is to generate thinking in the discipline of bibliographic instruction concerning the direction of existing instructional programs. It is intended to help librarians articulate and focus on what their instructional objectives should be and stimulate research into whether existing programs are achieving these objectives. As such, the Statement is not designed to introduce the new librarian to the field, nor is it designed to introduce an outside faculty member to the relevant concepts within the discipline. Rather, it is intended to serve as a statement of general direction for practicing librarians to review when examining current instructional programs or developing the keystones of new programs.

The role of bibliographic instruction is not only to provide students with the specific skills needed to complete assignments, but to prepare individuals to make effective life-long use of information, information sources, and information systems. To this end, the Model Statement attempts to outline the pertinent processes individuals use when gathering information. The Statement does not attempt to be comprehensive. The content is designed as a set of examples or points of departure and is not intended to serve as an institution's primary document.

The Model Statement is comprised of a set of general and terminal objectives which describe the general processes used when gathering information. Three objectives are normally used to describe the learning activities desired for a particular instructional unit. These objectives include: general objectives; terminal objectives; and enabling objectives. General objectives describe the overall goals of the programs and what the program is intended to achieve. Terminal objectives break down the overall objectives into specific discrete measurable results. Enabling (behavioral) objectives define the specific knowledge or skills necessary to achieve the terminal objectives. They are associated with the behavior of the person who has to master the material. Since each institution must determine their own enabling objectives, they are not included in this document, which attempts to generalize the processes used to access information.

For convenience, the series of general and terminal objectives listed in the Model Statement has been broken into four broad areas of concern with corresponding objectives listed in each of the areas. The Statement outlines how information is:

a) identified and defined by experts;
b) structured;
c) intellectually accessed;
d) physically organized and accessed.

The section headings represent significant areas or topics of concern to instruction librarians. No set order is intended.

When developing the Model Statement, the Task Force was guided by the following principles:

1. *User groups targeted by the objectives.* The Model Statement is designed to address the needs of all potential user groups within academic libraries. This was done for two reasons: 1) Experience has shown that there is no homogeneous group of "students" or even "undergraduates," but rather there exists a diverse student body whose members operate on a continuum of research sophistication; 2) Increasing sophistication in the field of bibliographic instruction has resulted in the development of many excellent programs of instruction for students, faculty and university staff alike. The revised document attempts to reflect the needs of these user groups also.

2. *Ordering of the objectives.* Depending on the information need of the individual or group in question, the librarian may find instruction in "highly sophisticated" information access skills essential for the undergraduate, while the graduate student or even the faculty member may need training in basic skills. In order to provide the greatest flexibility, the objectives are not ordered; rather, it is for the librarian to determine what objectives fulfill the needs of the specific user group in question.

3. *Institution and tool specific information.* It would be literally impossible to list all the objectives which describe institutional and tool specific differences. The Model Statement reviews the similarities within these sources and focuses on the process of using information and information sources, recorded and unrecorded, rather than focusing on library processes. The document is therefore conceptually based and does not include tool specific or institution-specific detail. The Task Force feels that tool specific or institution specific information is more appropriately placed within enabling objectives.

4. *Language used.* The Model Statement uses very specific language to describe generic processes. Since common terms used by librarians have different and often divergent meanings, it is recommended that the attached glossary be consulted when using the document.

5. *Incorporation of technological advances.* Advances in technology have been incorporated into various sections of the document where appropriate rather than examined separately. For example, the methods used to retrieve information sources from an online catalog are explained in the "Intellectually Accessed" section, and the explanation that a catalog is a holding list is detailed in the "Physically Organized and Accessed" section. By describing processes rather than tools, it is hoped that the Statement will remain effective long after the present "new" technology becomes old.

6. *Evaluation of information sources and systems.* It was felt that evaluation of information, information sources, and information systems is something that occurs throughout the search pro-

cess. To this end, evalution issues have been incorporated into each section of the document where appropriate.

7. *Evaluation of objectives.* Specific attention was not devoted to developing evaluation designs for the attainment of objectives in an instructional setting, as it was felt that guidance in this matter was available through *Evaluating Bibliographic Instruction: A Handbook,* published by ACRL's Bibliographic Instruction Section in 1983.

8. *Structural flexibility.* The structure of the document has been designed to permit as much flexibility as possible. It consists of four major areas of concern, each with its own general and terminal objectives. It is probable that no one library's program will include all the objectives listed; rather, each objective is suggested as an element related to the area of concern. The flexibility of the document lies in its "mix and match" nature: terminal objectives of one section may be matched with terminal objectives of another section depending upon the program being designed. In addition, the Model Statement simply lists suggested areas of interest; when designing a program, the librarian may find that additional terminal objectives must be created in order to reflect the needs of the group in question.

Using the Model Statement

The Model Statement is designed to be used in two ways. First, it is intended to serve as a checklist through which to assess and examine present programs. Second, it is intended to serve as a resource through which to develop new programs. To use the Statement effectively for the latter purpose, the following steps are recommended:

1. Define the user group and the present level of sophistication;

2. Determine the purpose of instruction;

3. Determine which overall sections of the document are relevant to the proposed program;

4. Select the relevant terminal objectives from each section;

5. If needed, create additional subpoints to the terminal objectives selected.

6. Develop enabling objectives.

Model statement of general and terminal objectives

1. How information is identified and defined by experts.

General Objective: The user understands how information is defined by experts, and recognizes how that knowledge can help determine the direction of his/her search for specific information.

T1*.The user understands that individuals or groups identify themselves as belonging to specific areas and or disciplines.

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*T = Terminal Objective.

T2. The user recognizes that individuals within these groups may combine information from information sources with original thought, experimentation, and/or analysis to produce new information.

T3. The user recognizes that disciplines use specific methods to communicate information.

a. The user recognizes that information sources can be recorded or unrecorded sources which may appear in different physical formats.

b. The user recognizes that information sources go through various review processes to be accepted as credible by the research community.

c. The user understands the processes through which information sources are accepted and disseminated in the research community.

T4. Once a topic of interest is selected, the user understands how it can be refined and can formulate a question.

a. The user recognizes when a question is discipline-specific or interdisciplinary.

b. The user understands that the initial question may be too broad or narrow to investigate effectively and that adjustment in scope, direction, or timeframe may be needed.

T5. The user understands how to construct an approach or strategy appropriate to the scope and complexity of the question and appropriate to the anticipated result of the research process.

a. The user understands that the indentification of specific information sources will depend on the individual question and the strategy devised.

b. The user recognizes that the audience of the end product will in part determine the direction and type of search conducted.

c. The user understands that the form and the purpose of the end product will in part determine the direction and type of search conducted.

2. How information sources are structured.

General Objective: The user understands the importance of the organizational content, bibliographic structure, function, and use of information sources.

T1. The user understands how the organizational content of recorded information sources is structured and how this knowledge can help determine the usefulness of the source.

a. The user understands the importance of evaluating the author's credentials.

b. The user understands how the timeliness or the date of publication may determine the value of a source.

c. The user recognizes that the publisher's reputation may affect the usefulness of the source. The user recognizes that in periodical publications, the editorial review process is as important as the publishing information.

d. The user recognizes the importance of title, thesis, preface, introduction, table of contents, appendixes, summary, and/or abstract in evaluating the scope, limitations, and special features of the

information source and thereby its usefulness.

e. The user recognizes that the purpose of the author in presenting ideas, opinions, or research may in part determine the usefulness of the source.

f. The user recognizes the organization or arrangement of an information source may affect its value (hierarchical, alphabetical, chronological, tabular, regional, classified, schematic, or numerical).

g. The user recognizes that the amount and type of documentation used may affect the value of a recorded information source.

T2. The user recognizes that unrecorded information sources exist and can evaluate their potential usefulness.

a. The user recognizes the importance of the individual's or group's credentials and is able to evaluate this information to determine the source's credibility in relation to the topic.

b. The user recognizes the importance of evaluating the timeliness of the information.

c. The user recognizes the importance of correctly identifying the source's thesis and arguments to determine whether the information provided is pertinent to the topic.

T3. The user understands how information sources are bibliographically structured and how this knowledge can help determine the usefulness of the source.

a. The user recognizes that the information needed to identify information sources is manipulated into systematic sequences called citations and that the amount of information required and the form of a citation may vary from field to field.

a. 1. The user recognizes that the bibliographic structure of recorded information sources may vary among disciplines and within subject areas.

a. 2. The user recognizes the major types of citations and knows where they typically occur (documentary notes, in-text citations, bibliographic entries, etc.).

a. 3. The user recognizes that the form of a citation varies for different subjects areas and disciplines.

a. 4. The user recognizes that the amount of information required in a citation varies for different subject areas and disciplines.

b. The user understands the relationship of citations to other information sources.

b. 1. The user understands that the purpose of a citation is to enable others to identify and locate pertinent information sources.

b. 2. The user understands that some sources may indirectly refer to other sources through the use of incomplete citations (implicit vs. explicit footnotes).

b. 3. The user understands the significance of identifying information sources which are repeatedly cited by more than one source.

b. 4. The user understands the link between the information provided within a citation and the organizational structure of the source cited and recognizes the importance of the link in evaluating the usefulness of the source identified.

3. How information sources are intellectually accessed by users.

General Objective: The user can identify useful information from information sources or information systems.

T1. The user understands that although any information about an information source could be used to help identify and locate it, there are certain elements of information called access points which are accepted by the research community as the most pertinent through which to identify a source.

a. The user recognizes that the "author" entry is a commonly used access point.

b. The user recognizes that the title of a recorded information source is another commonly used access point.

c. The user recognizes that a "subject" topic, or description field is a commonly used access point.

d. The user recognizes that the use of additional access points depends on the structure and format of the source used to identify new information.

d. 1. The user recognizes that each element of information found within a citation may potentially be used as an access point.

d. 2. The user recognizes that information found within an abstract or summary may potentially be used as access points (usually through the method of key word searching where each word can be used as an access point).

d. 3. The user recognizes that additional access may be available through codes, categories, or mapping which may not be obvious in the information source or system.

e. The user understands that some sources use controlled vocabulary assigned by an indexer, cataloger, or computer programmer as access points.

e. 1. The user recognizes that most controlled vocabulary describes the subject or author of the information source.

e. 2. The user recognizes that the rules governing indexing practices may influence the process of retrieval.

e. 3. The user understands that there may be printed or online lists or thesauri which may aid in the identification of these access points.

e. 4. The user recognizes the relationship of broader, narrower, and related terms.

T2. The user understands that there are a variety of information sources called access tools whose primary purpose is to identify other information sources through the use of access points.

a. The user recognizes that access tools used vary by discipline or subject area.

b. The user recognizes that access tools used vary by the type of information source needed.

c. The user recognizes that access tools vary in format and recognizes the implications of format as it relates to the availability of access points.

d. The user recognizes the importance of the organizational content of the access tool in determin-

ing whether or not it is a good information source.

e. The user understands that no access tool is comprehensive in scope.

f. The user understands the importance of selecting the appropriate access tool in order to identify useful information sources.

T3. The user understands how to manipulate access points to identify useful information or information sources.

a. The user understands when it is appropriate to search for information through the use of a single access point.

b. The user understands the concept of Boolean logic and its importance in searching for information under more than one access point.

c. The user understands the importance of browsing.

d. The user understands the importance of proximity searching (looking for two or more words in the same sentence, paragraph, record or file).

e. The user understands that given insufficient information to identify a particular access point, there are steps which may help identify it.

e. 1. The user understands truncation.

e. 2. The user understands key word searching and knows when it may be appropriate and possible.

T4. The user can evaluate the citation retrieved or the accessed information and determine whether or not it is at the appropriate level of specificity.

T5. The user recognizes the absence of recorded information sources on a specific topic, realizes the implications and recognizes the alternatives.

a. The user realizes that the lack of recorded information sources does not preclude the existence of unrecorded information sources.

b. The user recognizes that the lack of recorded information may suggest the necessity of original analysis or data collection.

c. The user recognizes that he/she may have to change the direction of the search if the use of unrecorded information sources or the gathering of primary data is not feasible.

5. How information sources are physically organized and accessed.

General Objective: The user understands the way collections of information sources are physically organized and accessed.

T1. The user understands that libraries and library systems may group information sources by subject, author, format, publisher, type of material, or special audience.

a. The user recognizes that many library systems are decentralized and the materials at each location may be distinguished by subject, format, publisher, type of material, or by special audience.

b. The user recognizes that materials in like formats are usually housed together in special areas of the library or in particular units of the library system along with the appropriate equipment needed to utilize these materials.

c. The user understands that a library may choose to house materials by one publisher together in one location or disperse them throughout the library's holdings.

d. The user recognizes that types of materials may be grouped together in order to provide ease of use or because of preservation and maintenance concerns.

e. The user recognizes that some libraries provide separate collections for special user groups.

f. The user understands that materials on like subjects are usually housed together.

f. 1. The user recognizes that some branches of a library system may be designated by the subject area or discipline.

f. 2. The user understands that classification schemes are designed to enable libraries to locate materials on the same subject in the same discipline in close proximity to each other.

T2. The user understands that the library uses call numbers to assign a unique physical address to each item in the collection.

T3. The user understands that individual items within a library system's collections are listed in special holdings or location files.

a. The user understands that there is usually a central holdings or location file for the library's collection and that might be in one or more formats.

b. The user understands that various special collections in the library or library system may have special holdings file and that they may or may not be subsets of the central file.

c. The user is aware that there are special files which can be used to identify the holdings of items available from other libraries.

T4. The user understands that the library staff is comprised of individuals with varying degrees and areas of expertise, who provide certain services through departments and who may be helpful in accessing information.

T5. The user understands the policies and procedures used by library departments and recognizes that these may vary.

T6. The user understands that the campus library is not the only location through which to retrieve necessary material.

a. The user recognizes that libraries do not have comprehensive holdings and that one library may lend an item from its collection, or furnish a copy of an item from its collection to another library not under the same administration.

b. The user recognizes that in order to facilitate library cooperation in resource sharing, many libraries have developed networks and consortia.

c. The user understands that information sources may be available for purchase by individuals through publishers and or document delivery services and that some information sources are only available on a purchase basis.

d. The user recognizes that personal networks may be essential to retrieving appropriate information.

Glossary

Access: to retrieve information.

Access points: specific pieces of information identified as being useful to the retrieval of information.

Bibliographic structure: the framework of explicit links of footnote references and bibliographic citations or implicit links of tacit relationships.

Citation: a bibliographic record (or systematic sequence) which includes the information necessary to access an information source physically.

Communication: the transfer of information in the various media from one person, place, or device to another.

Data: the symbols or characters of a language. Examples: the letters of the alphabet; numbers; etc.

Document (Recorded Information Source): a physical entity in any medium upon which is recorded all or part of a work or multiple works. Examples: book, journal article, etc.

Information: a grouping of data which has a particular meaning within a specific context. Examples: a word, a name; etc.

Information source: a single entity from which information is retrieved. Examples: a person, a book, a journal article, an index, etc.

Information system: an organized structure of interrelated information sources. Examples: an online catalog, etc.

Intellectual access: the isolating or selecting of useful information from information sources or systems.

Physical Access: the physical retrieval of an information source.

Process: manipulating, preparing, and handling information to achieve the desired results.

Structure: the logical arrangement or organization of information.

Unrecorded information: oral communication. ■■

ACRL meetings in San Francisco

A tentative schedule for ALA's San Francisco Conference, June 27–July 2, 1987.

ACRL BOARD OF DIRECTORS

First meeting: Saturday, June 27, 2:00–4:00 p.m.
Second meeting: Tuesday, June 30, 2:00–5:30 p.m.
Executive Committee and Section Officers luncheon: Saturday, June 27, 12:30–2:00 p.m.
Orientation for new Committee Chairs and new Section Officers Continental Breakfast: Sunday, June 28, 8:00–9:00 a.m.

ACRL GENERAL

President's Program/Membership: Monday, June 29, 2:00–5:00 p.m.

ACRL DIVISIONAL COMMITTEES

Academic Library Statistics: Saturday, June 27, 9:30–11:00 a.m.; Monday, June 29, 9:30–11:00 a.m.
Academic Status: Sunday, June 28, 9:00–11:00 a.m.; Monday, June 29, 9:00–11:00 a.m.; Tuesday, June 30, 2:00–4:00 p.m.
Academic Status—"Terminal Degree" Hearing: Sunday, June 28, 8:00–10:00 p.m.
Audiovisual: Sunday, June 28, 9:30 a.m.–12:30 p.m.
Audiovisual—Hearing on Standards: Saturday, June 27, 2:00–4:00 p.m.
Books for College Libraries **Advisory**: Sunday, June 28, 11:30 a.m.–12:30 p.m.