

“Electronic Reference Services: Opportunities and Challenges”

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(presented at COMO/SELA Annual Conference, Jekyll Island, GA, October 12, 2000)

Keywords: *Electronic reference / Chat reference / Video reference / Digital reference / Virtual reference*

Abstract: *The contemporary academic library actively designs, implements, and markets alternative reference services to meet client needs and to retain its identity in the digital world. The purpose of this paper is to discuss the changing nature of reference services based on preferred information delivery styles, remote availability of information, and evolving technologies. The emphasis will be on electronic reference services such ASK, chat, and video/teleconferencing. The history, current models, collaborative services, marketing, advantages, challenges, and staff competencies required to succeed in the digital reference environment will be discussed.*

Electronic or digital reference services have been offered since the late 1980's. These services continue to evolve and are impacted by various new technologies and end-user preferences. This paper will briefly discuss the following five areas: 1) a brief history of electronic reference services; 2) models that are currently in use such as ASK services, chat reference, and video reference; 3) marketing the services; 4) advantages and

challenges; and lastly 5) library staff competencies and skills needed to survive in the digital reference environment.

A quote from P. H. Lewis in a May 13, 1990 *New York Times* speaks well to the challenging and yet opportunistic era in which we find ourselves -- “[T]omorrow’s library will not necessarily be a place to go.... but rather a focal point for a variety of services. Such libraries without wall[s] are beginning to appear in schools and businesses, and the silent, musty stacks are giving way to high-technology centers, available to personal computers everywhere.”¹ We’ve come a long way towards the library without walls in ten years since this statement was made, particularly with the advent of the Internet and the Web. Some of the services of the library without walls, to which P. H. Lewis alluded, are what will be discussed today. With so much available on the desktop, librarians are scrambling to keep up with the current information mentality. With a computer and an internet connection, an individual can get to the Library of Congress catalog – think of how far-fetched that was not very many years ago. But, of course, there’s more to finding information than having access to the Library of Congress. Users need the help of a librarian and that’s where virtual reference comes in – in order for the computer generation to obtain the “personalized help” they need from their computer, at their desktop, virtual reference services are opportunities librarians must consider.

Technology provides many options and possibilities which facilitate enhanced, convenient, value-added, and on-demand library services. For the library without walls, there is an evolving interest in information delivery and retrieval in its many forms and formats. Bernie Sloan states in a summer 1998 *Library Trends* article that “librarians

will continue to have a role in the future of networked information, serving as an intermediary, providing value-added information, much as we do in a physical setting or place, while experimental projects will test the extension of traditional reference services into the electronic world.”² Another quote to help guide us in this evolutionary time is from Stuart Sutton’s book, *Roles of Reference Librarians*. He states “The patrons no longer desire the full range of information available on a given topic, but only the best information . . . the librarian’s role shifts from advocate of a collection to a filter for the user.”³ In a July 2000 ALA presentation, Sara Weissman, librarian at Morris County Public Library in New Jersey, aptly described electronic reference services as “the search for the un-patron.” She reported that “patrons have no clue what’s in a library or what a librarian can do.”⁴ Reaching the un-patron can be accomplished through the electronic reference services that will be discussed today.

History

Electronic reference has only recently become the standard. Academic libraries began offering basic email reference services in the late 1980’s according to listserv discussions and journal literature dating back to 1986.⁵ A few e-reference services may have preceded this timeframe, but generally they became prevalent in the early 1990’s. Many services began as “Ask A Librarian” services; it remains the most common name used for these services. A unique name for one service is “Ask the NERD a Question” at Newcastle University Library in England. NERD stands for “The Newcastle Electronic Reference Desk.” Our first exposure to ASK services was at the summer 1994 American Library Association Conference. The Head of Reference at Indiana University discussed and described their service at a RUSA Reference Services in Large Research Libraries

Discussion Group meeting. The idea was a good one and it was proposed that Georgia Tech begin such a service, which was initiated in October 1994.

In addition to the traditional ASK services in academic and public libraries, there are ASK services that are much more specialized and subject-based. Two of them are AskERIC (askeric.org) and The MAD Scientist Network at Washington University Medical School in St. Louis (www.madsci.org).⁶ A web site that provides an ASK locator service by subject is www.vrd.org. This site covers a broad range of specialized subjects, e.g. there's an "Ask an Antarctic Expert" link.

The University System of Georgia libraries have recently initiated a cooperative electronic reference service initiative. It uses the name Ask A Librarian and can be found on the GALILEO home page. Susan Curtis at University of Georgia libraries is coordinating this project. The project is open to all libraries in Georgia, however only University System of Georgia libraries are currently participating. Other libraries invited to participate decided against it at this time, mainly out of concern for the time involved. In its present form, this service will generally be used by librarians to find librarian experts and/or to locate and utilize resources that are not readily available at home libraries.

One national collaborative electronic reference initiative is the Collaborative Digital Reference Service (CDRS) www.loc.gov/rr/digiref/. At the ALA Annual Conference this summer, Diane Kresh, one of the developers of CDRS, described it as "providing professional service anytime, anywhere...." CDRS is currently limited to libraries; in

July 2000, there were thirty libraries participating. Libraries have three options for participation. They can: 1) ask and answer questions; 2) ask questions only; or 3) answer a limited number of questions. Request manager software is being used to manage the Q&A receipt, referral, and administration. Some of the benefits of the service are that it provides quality reference service 24 / 7 and a searchable Q & A database or FAQ is being developed.⁷

In addition to ASK services, there are chat reference and video reference services which will be discussed briefly later. Now more specifics about Georgia Tech's electronic reference initiatives will be discussed.

Ask A Librarian Services

Georgia Tech's Ask A Librarian service has proven a success since its 1994 inception due to its consistency, quality of service, and availability. ASK is located on the Georgia Tech home page and is also linked throughout the Library's web pages. The use of ASK is restricted to Georgia Tech students, faculty, and staff and requires a password. The Reference Department is also forwarded questions from individuals not affiliated with Georgia Tech, if their questions are related to Georgia Tech. ASK is staffed seven days per week by eight librarians and four library assistants; each day, there are primary and backup staff answering questions. The backup assists the primary when the volume of questions is high and assumes responsibility for the assigned day when the primary person is absent. Questions receive a response within one working day.

In the past eighteen months, three new components, an ongoing assessment survey, a client form, and a FAQ database, have been developed to enhance Georgia Tech's Ask A Librarian reference service. An ongoing ASK Assessment Survey was implemented in spring 1999. ASK clients are emailed at the end of the month in which they ask a question, with their original question included in the email. They are asked to complete an anonymous Web-based survey consisting of both open and closed-end questions. ASK questions are archived electronically until the end of the month in which they occur, at which time statistics are compiled and questions are assessed for their suitability for the Frequently Asked Questions or FAQ database.

The FAQ database is an Access database that will be available on the ASK homepage during fall 2000. This database will search three fields: the email subject line, the original question, and the answer. Questions included in the FAQ Database are from various sources, including archived ASK questions, selected questions from an older frequently asked questions database called REFQ, and questions that staff have answered electronically from their individual PCs. Client identifying information is stripped from transactions that are selected for the FAQ database.

The new ASK client form was implemented in spring 2000 after surveying digital reference literature and looking at other ASK sites that use forms. The form replaces a previous client question text box, and is used to standardize transactions and to approximate the information gathered from the traditional in-person reference interview. Because of the limitations of using only written language in the ASK reference format, a standardized form is essential in order to collect pertinent information from clients and to

reduce the “high dialogue penalties,” loss of relevancy, and timeliness resulting from multiple communications between the client and staff. Use of a form also reduces the assumptions made by staff about client needs due to lack of vital information.⁸

Real Time Reference

The more interactive electronic reference services such as “Chat” or “Real-Time” have begun in only the last two to three years. Implemented in May 1999, Georgia Tech’s “Real-Time Reference” service uses AOL’s Instant Messenger chat software to enable clients to ask and receive answers to questions while online. The service is currently installed on a Reference Desk PC, with a bell to announce incoming messages, and is available during all Library hours – 95 hours per week. Questions are archived on the PC’s hard drive for statistical and assessment purposes. Cornell calls a similar service “LiveHelp.” Morris County Public Library in New Jersey has a unique chat service called “AOL Homework Chat Room,” which they are testing from 3 – 5pm this fall. Web sites for identifying other library chat services are www-sul.stanford.edu/staff/infocenter/liveref.html and web.uflib.ufl.edu/hss/ref/chat/cc3.html. These sites also list various chat products and listservs.

Video Reference Services

Video reference services are the newest electronic reference option, tested since 1995 with varying degrees of success. There are few current implementations. A drawback to such high-tech services is that, in order to take advantage of the service, the user must install software and hardware at his or her workstation. From 1995 to 1996, University of Michigan tested videoconferencing software to provide electronic reference service to

residence halls for two hours per day. However, it has not become a permanent offering there. Another experiment in 1996 was the “See You See a Librarian” project. This project encouraged librarians “to install the CU-See Me software on their computers and connect to the echoing reflectors of the Sunsite at UC-Berkeley or the North Carolina State University (NCSU) Libraries.”⁹

Weblines chat software (the same software that Land’s End uses) is currently being tested at the University of California/Irvine. Using this software requires a fairly steep learning curve and requires extensive training for librarians, while the client side is generally easy. One of the benefits of Weblines is that it allows the librarian to push a page over to the client and the client to push a page to the librarian – e.g. the librarian can demonstrate a search strategy for a client or provide a web page for the client to consult, without the client having to go through all the steps. Compared to ASK and chat services, video reference most closely emulates in-person reference desk services. While UC Irvine is currently testing Weblines, Santa Monica Public Library implemented it in summer 2000. The conclusion from reading about these experiments is that video reference doesn’t appear to be readily feasible because it requires considerable technology expense for both the library and the library client.

Marketing

Georgia Tech uses the following methods for advertising reference services include posters and flyers in the Library, dormitories, and other campus buildings, brochures, marketing on the Library’s web site, and advertising as part of the signature in Ask A Librarian replies.

Advantages / Challenges / Staff Competencies

Some advantages of ASK services is that staff have the ability to confer with colleagues, think a question through, and potentially spend more time on research before responding to a question. This capability has made ASK a productive training opportunity for new Reference Department staff, working alongside experienced ASK staff. Advantages of electronic reference services, in general, are their provision of a record of the reference transaction, which facilitates cross training and evaluation. They also give clients alternatives for communicating with librarians in addition to the traditional reference desk and telephone inquiries. Lastly, it provides librarians the opportunity to assist the hard-to-reach patron or the “un-patron” in a reasonably convenient and expeditious manner.

Staff awareness of differing communication requirements and comfort in using them is imperative in providing quality e-reference services. Both ASK and chat reference consume more staff time than reference formats using verbal language because of the time it takes to construct and type a comprehensive answer. In addition, librarians may worry about written responses more than verbal ones at the desk (when there’s no written record).

Chat reference, on the other hand, has the same time pressures of other interactive reference formats - that of responding quickly to a question while the user is online, plus typing a response. Not everyone is equally articulate or fast at the keyboard and it’s

difficult to keep the patron happy or busy while the librarian tries to find the answer. Additional challenges are confidentiality, liability, and publicity.

Conclusion

A concluding anecdote will give you an interesting perspective about the advantages and challenges of electronic reference. A colleague was responding to a real-time reference inquiry that was taking considerable time and she got to the point where she was wishing she could discuss the inquiry via phone when, lo and behold, she discovered that the student asking the question was actually in our computer cluster adjacent to the Reference Desk where she was working. She didn't interject herself on this student in the computer cluster but completed the transactions in the manner the student preferred. One thing learned from this experience is that all individuals have preferred styles of information delivery and we should not force on them our preferred style of information provision.

This is one of the reasons Georgia Tech Library will continue to offer many information delivery options, although video reference is not on the near horizon unless the technology gets cheaper and easier. We encourage you to consider some or all of these electronic reference opportunities.

¹ Lewis, P.H. *New York Times*, 13 May 1990.

² Sloan, Bernie. "Service Perspectives for the Digital Library." *Library Trends* 47 (Summer 1998): 123-124.

³ Sutton, Stuart. "Future Service Models and the Convergence of Functions: the Reference Librarian as Technician, Author, and Consultant," in *The Roles of Reference Librarians: Today and Tomorrow* (New York: Haworth press, 1996). 131-133.

⁴ Weissman, Sara. "Reference 24 / 7: High Touch or High Tech." American Library Association Annual Conference, July 10, 2000.

⁵ Bushallow-Wilber, Laura, Gemma Devinney, and Fritz Whitcomb, "Electronic Mail Reference Service: A Study," *RQ* 35 (Spring 1996): 359-366.

⁶ Lankes, David R. and Abby S. Kasowitz. *AskA Starter Kit: How to Build and Maintain Digital Reference Services*. Syracuse: ERIC, 1998: p. 63.

⁷ Kresh, Diane. "Reference 24 / 7: High Touch or High Tech." American Library Association Annual Conference, July 10, 2000.

⁸ Sloan, Bernie. "Service Perspectives for the Digital Library." *Library Trends* 47 (Summer 1998): 131.

⁹ Morgan, E.L. *See You See a Librarian Final Report* . December 10, 1996.

<<http://sunsite.berkeley.edu/~emorgan/see-a-librarian>>