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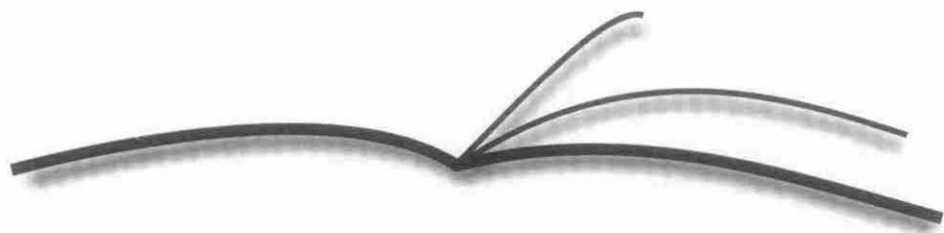
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Professional Competencies for Reference and User Services Librarians

RUSA Task Force on Professional Competencies

The purpose of the guideline that follows is to provide librarians, libraries, and information centers with a model statement of competencies essential for successful reference and user services librarians. Competencies must be relevant to the particular job requirements. Therefore, individuals and organizations applying these guidelines may wish to select those strategies for meeting the competency goals that are most appropriate to their situation.

These competencies are focused on the abilities, skills, and knowledge that make reference and user services librarians unique from other professionals. The competencies assume a basic infrastructure of competencies required by all professionals, such as skills related to communication, reading, writing, and mathematics. This statement also elaborates upon the more generic statement on core competencies developed by the

American Library Association (ALA) for all types of librarians, including librarians specializing in reference and user services. Finally, the "Guidelines for Behavioral Performance of Reference and Information Services Professionals" on approachability, interest, listening and inquiring, searching, and follow-up are incorporated through specific references below.¹

Definitions

Reference and User Services Librarians: Librarians who assist, advise, and instruct users in accessing all forms of recorded knowledge. The assistance, advice, and instruction include both direct and indirect service to patrons.

Competencies: Behaviors that excellent performers exhibit more consistently and effectively

than average performers. A behavioral basis is necessary because effective assessment of competencies depends on observed behavior. The task force has focused on identifying the underlying behaviors that lead to successful performance in organizations providing reference and user services to patrons. The competencies provided in this document are only those that are critical to excellent reference and user services to patrons. These competencies for reference and user services librarians are designed to be understood and used in the broader context of the ALA statement of core competencies.

Strategies: Strategies are specific plans of action that excellent performers typically employ to achieve competency goals.

Access

The primary focus of this section is on understanding information

Developed by the **RUSA Task Force on Professional Competencies:** Jo Bell Whitlatch, chair, Nancy E. Bodner, Muzette Z. Diefenthal, Nancy Huling, and Kathleen M. Kluegel. Approved by the RUSA Board of Directors, January 26, 2003.

needs and information behavior of primary users and developing the skills to effectively meet those information needs. Access includes competencies related to coping with user information overload, recognizing the importance of user time and convenience, and removing barriers to service. Access competencies include the ability to identify documents through a knowledge of bibliography and indexing, the ability to identify and provide solutions that minimize cognitive and physical barriers to access, and the ability to assess for individual users materials that provide the appropriate level of linguistic and conceptual access.

Responsiveness

Goal: A librarian provides services that are responsive to user needs.

Strategies:

1. Determines the situational context of the individual information needs of users when interacting with each user in person or through another communication channel
2. Analyzes information sources recommended to users in the context of the attractiveness, interests, and content level for each user
3. Suggests specific works that relate to what the user said is important
4. Uses the "Guidelines" statements on approachability, interest, and listening/inquiring when providing reference service in a traditional in-person service setting
5. Engages users in discussions about experiences related to their information needs and communicates interest in every user's experiences
6. Respects the right of users to determine the direction of their research by empowering them to pursue their own preferences

Organization and Design of Services

Goal: A librarian effectively designs and organizes reference and user services to meet the needs of the primary community.

Strategies:

1. Organizes presentation of information resources to match the process users typically use in seeking information to meet their needs
2. Creates bibliographies, book talks, displays, tutorials, electronic documents, and other special tools to increase access to information resources and to motivate users to use them
3. Organizes and effectively displays information so that it is meaningful to the primary user group
4. Uses the "Guidelines" statement on searching when providing reference service
5. Designs services to meet the special access needs of primary users, including those with disabilities, and those with English as a second language
6. Compiles and maintains information about community resources of interest to primary user groups so that users can be referred to appropriate sources of assistance

Critical Thinking and Analysis

Goal: A librarian provides high quality services by carefully analyzing both information sources and services.

Strategies:

1. Uses electronic and printed media to connect users with highly recommended, carefully selected sources for topics of greatest interest to primary users
2. Synthesizes a variety of information sources in order to pro-

vide the most relevant information to each patron

3. Evaluates information use patterns based on data collected as a result of information service operations and uses the results to enhance services to users
4. Applies knowledge about the process of information seeking to structure information services for users
5. Uses the "Guidelines" statement on follow-up when providing reference service

Knowledge Base

The areas of knowledge essential for reference and user services librarians are: (1) the structure of information resources in areas of knowledge central to primary users; (2) knowledge of basic information tools, including online catalogs, search systems, databases, Web sites, journals and monographs in both printed and electronic formats, videos, and sound recordings; (3) information seeking patterns and behaviors of primary users; (4) communication principles involving interaction with users both in person and through other channels; (5) the influence of technology on the structure of information; (6) copyright and intellectual property law; and (7) information competency standards.

Important skills include understanding assessment techniques, methods of continuous learning, how to apply knowledge to practice, and how to plan and implement enhanced services for users. Core knowledge is acquired as part of basic professional education. However, knowledge must be continuously updated. Therefore, this section of the competencies establishes goals and strategies for remaining current in domains of knowledge for reference and user services.

Environmental Scanning

Goal: A librarian monitors the most relevant information sources to routinely update knowledge of current developments in reference and user services.

Strategies:

1. Reads, views, and listens to media to keep current in areas of knowledge relevant to primary users
2. Attends exhibits at local, regional, or national professional conferences at least once a year when the institution provides support
3. Scans the environment for emerging technologies that are relevant to delivery of reference and user services
4. Keeps current on new information resources by consulting a wide variety of reviewing sources and publishers catalogs, including those of small presses, by attending professional meetings, by reading, viewing, and listening
5. Reads reviews in both print and online media concerning works in all formats of greatest interest to primary users

Application of Knowledge

Goal: A librarian effectively uses new knowledge to enhance reference and user services practices.

Strategies:

1. Reads the reference and research literature in user services and applies the knowledge gained to improving professional practice
2. Integrates use of latest technology and tools into everyday practice
3. Explores available technologies and their application to reference and user services
4. Experiments with latest available innovations to assist users in meeting their information needs

Dissemination of Knowledge

Goal: A librarian shares expertise with colleagues and mentors newer staff.

Strategies:

1. Teaches classes in areas of expertise
2. Prepares presentations in areas of expertise
3. Creates Web pages in areas of expertise
4. Discusses issues with colleagues
5. Mentors colleagues through listening, coaching, and serving as a role model
6. Reviews draft manuscripts for colleagues
7. Participates in professional discussions through meetings, videoconferences, electronic discussion lists, and other available communication methods and forums

Active Learning

Goal: A librarian actively contributes to improving professional practice through engaging in projects with colleagues and enhancing individual skills through independent learning.

Strategies:

1. Participates actively in professional organizations and works with librarians from a wide range of organizations
2. Acquires skills through technology-based learning modules when available and appropriate

Marketing, Awareness, Informing

A planning process is essential to identify and promote services to users. A strategic plan of operations provides a framework for goals and objectives to be formal-

ized. This road map for service functions provides means and methods by which services and information are delivered. A marketing plan, an aspect of strategic planning, is a promotional mechanism by which goals, objectives, and strategies can be measured in a quantitative manner. Who is providing reference services, what services are being provided, and the effectiveness of the services are the issues that need to be addressed.

Assessment

Goal: A librarian conducts research to determine what types of reference services to provide and to what types of users these services will be provided.

Strategies:

1. Conducts surveys within and beyond the library building to address the needs of users in the area of reference services
2. Conducts focus groups to meet and interact with users and to discuss and gather information about users' information needs
3. Consults with other libraries to network and brainstorm concerning the programs and services that are provided in the area of reference
4. Meets with community leaders to bridge the gap between the library reference service and the individuals and groups that make up the community that the service addresses
5. Evaluates information gathered from the research and background preparation for the development of the reference service program
6. Determines the user focus and reference service that will be provided
7. Implements the reference and user services program that meets the information needs of users in the designated community

Communication and Outreach

Goal: A librarian effectively communicates the nature of the reference and information services that are provided to users being served.

Strategies:

1. Develops a written marketing plan as part of a strategic plan of services and operations to set goals and objectives of service
2. Develops a public relations plan for staff that trains individuals and addresses the importance of publicity and promotion of reference services
3. Creates a physical environment that encourages users to visit the physical library setting or use the virtual library and its services
4. Promotes reference services via electronic media such as Web sites, e-mail, mail lists, radio, and television
5. Uses print media such as newspapers, brochures, newsletters, displays, and posters to communicate the reference services being provided
6. Determines community relationships and develops partnering models of services with groups within the community
7. Engages users through lectures, programs, tours, school visits, departmental addresses, and press conferences to promote the reference services offered

Evaluation

Goal: A librarian consistently and systematically evaluates the effectiveness of the marketing of reference and information services.

Strategies:

1. Conducts in-house meetings and training sessions to gather

feedback from reference librarians regarding the success of the reference services being provided and products being offered

2. Engages users in focus groups, surveys, and feedback forms as a user follow-up for reaction and perception of reference services
3. Evaluates the current and changing trends in reference and information services and adjusts the services being provided and the promotion of these services
4. Identifies the strengths and weaknesses of the products being offered as part of reference services delivery
5. Identifies new methods of service, new products, and potential new users by participating in conferences, workshops, and professional associations
6. Decides what reference services and products will be retained and what changes will be implemented, if any
7. Continues the evaluation process as a periodic review set in a timeline that allows all reference service providers to participate

Collaboration

According to *Webster's*, to *collaborate* is "to work jointly with others or together especially in an intellectual endeavor"; the *Oxford English Dictionary* definition is "to work with another or others, to co-operate."² Although librarians have always worked together, collaboration has assumed new importance in a world that has witnessed a phenomenal growth in information, new knowledge, and sophisticated technology, all within a relatively short time-frame. Because of the expansion of information and the increasing variety of ways to access information, librarians must work with

colleagues, professional organizations, agencies, and other groups to ensure that users receive the information service they need at the time of need and in the most suitable format. Librarians need to recognize and respect the role played by the user in the information interaction. Librarians must actively pursue collaborations that enhance services for their users.

Relationships with Users

Goal: A librarian treats the user as a collaborator and partner in the information-seeking process.

Strategies:

1. Uses the "Guidelines" statements on listening/inquiring, searching, and follow-up
2. Asks user's opinion and advice while working through the information transaction
3. Involves the user in the process and in making decisions.
4. Acknowledges the knowledge brought by the user to the interaction
5. Acknowledges the limits of local resources and refers to an appropriate resource base

Relationships with Colleagues

Goal: A librarian works closely with colleagues to provide quality service to users.

Strategies:

1. Recognizes that colleagues have unique knowledge, skills, and strengths that can assist in responding to inquiries
2. Elicits assistance from a colleague when appropriate
3. Seeks opportunities to share knowledge and expertise with colleagues
4. Facilitates and participates with colleagues in team development efforts to improve user service

5. Works effectively as part of a team
6. Models effective team process behavior, including listening, discussing, and trust
7. Develops with colleagues shared goals and values for excellent user services

Relationships within the Profession

Goal: A librarian develops collaborative relationships within the profession to enhance service to users.

Strategies:

1. Takes advantage of the networking opportunities provided by active participation in local, regional, state, national, and international professional organizations
2. Identifies and seeks out possible partners in order to expand services to users
3. Volunteers for and participates in state and national collaborative efforts that will benefit local users
4. Uses the "Guidelines" statement on follow-up

Relationships beyond the Library and the Profession

Goal: A librarian develops and maintains partnerships beyond the library and the profession to strengthen services to users.

Strategies:

1. Identifies partners who have knowledge and expertise of value to the library's users
2. Communicates effectively with partners to ensure mutual understanding of goals, objectives, and values
3. Forms partnerships to improve existing systems and to develop new products and services

Evaluation and Assessment of Resources and Services

Consistent assessment of resources in the context of users' needs is essential to keep any information service vital and relevant. A parallel effort in assessing and evaluating the delivery of information services is equally important. A wide range of information services is provided to the users through a large and growing set of delivery channels. There are print collections visited on-site, print materials that are delivered to the user, electronic collections delivered over the Internet, information services provided through in-person, telephone, fax, e-mail, and Web-based virtual sessions. In all these services, the goal is to make the resources of the library available to the user in a way and a format that meets the user's needs.

The most critical element in any information service is the staff providing it. Using evaluation measures for performance of the staff is a challenge. Many aspects of the information service interaction are intangible and difficult to measure objectively. However, the goal of assessing and evaluating performance remains valid, if elusive.

Reference and user services librarians are required to have competencies in both formal and informal methods of evaluation and assessment. Assessment methods can range from effective use of closure questions in the reference interaction to a user feedback form on interlibrary loan documents and on through structured surveys and studies using unobtrusive observation. Use of these and other assessment and evaluation measures will vary across time and across institutions to fit particular needs, but the competencies required to conduct them will endure over time.

User Needs

Goal: A librarian effectively uses tools and techniques to survey users and their information needs.

Strategies:

1. Identifies the user population and the potential user population
2. Plans and conducts regular assessments of information needs of primary user groups, using various formal and informal methods
3. Translates user needs into a plan for services

Information Services

Goal: A librarian assesses the effectiveness of information services provided to users.

Strategies:

1. Develops and incorporates measures of evaluation into any new information service
2. Develops service standards for new and existing information services
3. Creates an organizational climate in which all existing and proposed services are measured consistently against a standard
4. Analyzes the resources available and uses the human and fiscal resources for service programs that most effectively meet the needs of users in the designated community

Information Resources

Goal: A librarian assesses and evaluates resources in all formats in terms of objective standards and how well it meets the library's user needs.

Strategies:

1. Assesses the content of resources in the print and virtual collections for accuracy and currency
2. Determines the authority of these resources

3. Identifies any bias or point of view in an information resource
4. Evaluates new information sources appropriate for the primary users
5. Reads reviews of new information resources to complement the librarian's own judgment
6. Writes and publishes reviews of new information resources

Service Delivery

Goal: A librarian evaluates new or existing services for a match between user capabilities and service technological requirements.

Strategies:

1. Determines the appropriate mix of technologies and delivery channels to meet the particular user group's needs
2. Assesses new technologies to see if they can meet the service needs more effectively than current methods, but not disenfranchise users
3. Experiments with and evalu-

- ates changes in services to users
4. Assesses the distribution of human and fiscal resources to ensure that resources are not tied to services or delivery methods that are no longer needed

Information Interfaces

Goal: A librarian evaluates the format, access, and presentation aspects of resources as part of the overall assessment of the value of tools.

Strategies:

1. Identifies any factors that impede the use of the resource
2. Determines if there are alternative information resources that have better user interfaces
3. Communicates with the information resource designers concerns about usability

Information Service Providers

Goal: A librarian effectively identifies and employs evaluation

techniques that measure staff performance.

Strategies:

1. Identifies and uses those measures that have been developed by the profession, for example, the RUSA "Guidelines for Behavioral Performance"
2. Works with the information service staff to develop a consensus of service standards
3. Develops measures that will be useful in assessing whether or not service standards are being met
4. Supports and encourages an *esprit de corps* that will work to evaluate and improve service behaviors ■

References

1. "Guidelines for Behavioral Performance of Reference and Information Services Professionals," *RQ* 36 (winter 1996): 200-3. Also available at www.ala.org/rusa under "Reference Guidelines."
2. *Merriam-Webster Online Dictionary*, s.v. "collaborate"; *Oxford English Dictionary*, 2d ed., s.v. "collaborate."