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# Research topics from the program - Unanswered questions: Gaps in research on reference effectiveness

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At the 1991 Annual Conference, the RASD Research and Statistics Committee sponsored a presentation and small group discussion to explore topics of needed research in the areas of reference and adult services. Last issue (Winter 1991), we published James Rettig's keynote speech, "Unanswered Questions." Presented below are the questions that resulted from the brainstorming session that followed Rettig's talk. Some of these will be explored further at the committee's Preconference on Reference Effectiveness, to be held in conjunction with the 1992 Annual Conference.

The RASD Research and Statistics Program at the ALA Annual Conference in July 1991 generated many ideas for future research. [1] The following topics were generated from group brainstorming and have not been edited by the RASD Research and Statistics Committee to select the most suitable topics for future research.

#### Collections--Both Automated and Printed

##### Core Collections

\* Are there certain reference tools

without which a reference service cannot

function effectively? Significant

variables in a study of this question might

be country, urban vs. rural libraries,

and type of library (academic or

public).

\* What is an optimum reference

collection size? Is there a threshold to

reference collection size above which

effectiveness declines? Are there variables

that modify this threshold? At what

point does more produce less and why?

\* How does optimum collection size

relate to the mission of the library or

the characteristics of the population it

serves?

\* How have increasing serials prices

and resulting serials cuts influenced

the utility of reference collections?

\* What allocation of funds between

reference sources and circulating

collections provides the most effective

library service?

\* How can use studies of reference

sources be utilized to identify core

collections? In addition to reference

collection use, what other factors should be considered?

#### Organization of Collections

\* What is the optimum way of organizing reference collections? Indexes? Do these differ by type of library?

\* How does the physical accessibility of a source to the librarian influence the probability that the answer will be found?

\* To what extent does the way in which a reference collection and its various parts are arranged become a self-fulfilling prophecy about which items will receive the most use?

\* Which indexing systems/subject terms within the same discipline are most effective?

\* What is the utility of reference sources in different media (e.g., CD-ROM, online, or printed materials)?

\* Will the same database be a more effective reference source when locally mounted or remotely accessible?

#### Collection Use

\* Who uses the reference collection and what sources do they use?

\* Is frequency of use of a source related to value of information provided by the source?

\* How do patrons use reference collections?

\* Do patrons (unassisted by reference librarians) and librarians tend to use different reference sources? If they do, how does their use differ?

\* How do reference librarians select sources they use to provide answers to

queries? What are the major factors that influence their decision?

#### Electronic Sources

\* Do users' expectations of electronic reference sources differ from their expectations of printed sources? If so, how do their expectations differ and why?

\* In searching electronic systems, do librarians make a difference to users in value added to search results?

\* What factors influence the librarian's success as a human interface between an electronic system and a user?

\* Do reference staff really understand how each electronic system works?

\* How do the increasing number and complexity of electronic information sources with different search strategies and interfaces affect delivery of effective reference service?

\* What is the most effective design for screen displays?

\* How do librarians decide how much to teach a user?

\* How do people learn to use electronic sources? How do people's varied learning styles affect their success in using an electronic system? How do users make the translation from one electronic system to another?

\* What motivates librarians to select an electronic source? What motivates patrons to use a particular electronic source?

\* What variables are most influential in user evaluations of search results? In evaluating search results, is more

better? Or is less better?

#### External Resources

- \* Under what circumstances should a reference librarian turn to external resources? A significant variable in such a study might be type of library (e.g., academic, public, or special).
- \* What is the most effective method for librarians to identify the most appropriate external resources?

#### Personnel Performance Management

##### Performance Appraisal of Individuals

- \* What peer review methods are the most effective?
- \* What is the most effective method of observing reference librarian performance without disrupting service to patrons?
- \* For academic librarians in faculty status situations, how can performance management systems be combined with established peer review systems?
- \* How does performance evaluation change when there are no perceived rewards available?

#### Environment and Organizational Climate

- \* What working conditions, managerial practices, and reward systems yield the most effective reference performance?
- \* What personnel evaluation systems are the most informative and helpful to both the individual being evaluated and the employing organization?
- \* Does the administrative climate (e.g., supportive and involved vs. unresponsive and remote) affect the quality of reference service provided? If so,

what is the impact of different  
managerial levels (e.g., department heads  
vs. top managers)?

\* What is the impact of different  
supervisory styles upon reference  
effectiveness?

\* What can the different levels of library  
management do to increase quality of  
reference service?

\* How do different physical  
arrangements of the reference desk influence  
reference service effectiveness?

#### Staff Skill and Knowledge

\* What are the skills and what is the  
body of knowledge a reference  
librarian must have to be an effective  
reference service provider?

\* What effect do various types of  
continuing education programs have on  
performance?

\* To what extent is type of library a  
variable, especially in terms of knowledge  
and skills required to render effective  
service?

\* Do peer/mentor counseling systems  
improve reference service quality?

#### Responsibilities

\* Does a division of labor by type of task  
among the reference librarians of a  
department result in better service  
overall or not?

\* Does the work performed in reference  
service lend itself to specialization and  
a team approach? Would reference  
service be conducted more effectively  
by teams than by the solitary  
individual usually found staffing a reference  
desk, especially at peak demand times

such as evenings and weekends?

## Managing Workload--Volume and Desk Staffing

### Type of Personnel

\* What sort of personnel are most

effective--specialists or generalists?

\* What is the role of library assistants in

providing reference service and what

are the limits, if any, on the services

they can provide effectively?

\* How can reference responsibilities be

assigned to the various levels of library

staff to balance needs for high quality

and cost effective reference service?

\* Do librarians and library assistants

differ in their approaches to seeking

answers to reference questions? If so,

how do these differences influence the

quality of service provided?

\* What variables are most important in

successfully utilizing staff, who are not

librarians, to provide effective

reference service? Important variables to

include in a study might be: type of

training, education, questions

answered, referral process, and staff

levels (e.g., graduate students, clerical,

library technicians, undergraduate

students).

\* What sort of services or tasks are best

performed by various classes of

personnel?

\* How many hours should the reference

desk be staffed relative to the library

building hours? If the reference desk

is not staffed for all library building

hours, how do users satisfy reference

information needs when the reference

desk is not staffed? What building and

system designs promote effective independent use?

#### Workload and Staffing

\* What is the optimum amount of personnel needed in a given setting for effective reference service?

\* Do individual libraries even know, other than in an impressionistic way, when their peak demand periods are?

\* Is there a relationship between the length of time a librarian spends on a question (or with a patron) and the likelihood of success? If longer amounts of time are related to greater success, is there a point after which likelihood of success diminishes?

\* What method of handling a crowd at the reference desk is more effective--dealing with quick questions first or the first-come-first-served method?

\* Just how long are patrons willing to wait for reference service? What makes reference service different from other services (e.g., auto repair, medical appointments, or parent-teacher conferences) that people routinely wait for, often without a word of complaint?

\* What are the most important workload variables influencing quality of reference service? Variables that should be studied include: hours scheduled at the desk per week, intensity of demand per hour, and other factors creating chronic stress, such as poor equipment maintenance, inadequate signage, poor building design, and telephone service demands



conflicting with in-person service demands. How can appropriate workload norms/standards be developed for reference librarians?

\* How should recommendations for the optimum number of hours spent at the desk or in online search, or other reference tasks, take into consideration not just the physical and psychological limits of the librarian, but also the librarian's needs for self-esteem and a sense of control over his or her own professional conduct?

#### Evaluation of Success/Quality/Accuracy of Reference Outcomes

##### Types of Service Outcomes

\* What are the strengths and weaknesses of various measures of effectiveness that have been used (e.g., user satisfaction, expert review, self-evaluation, unobtrusive measures, obtrusive measures, and comparisons of patron and librarian assessments of the same encounter)?

\* What are the limits of unobtrusive testing of the accuracy of answers to reference questions?

\* Do patrons know enough about the potential of reference services to evaluate them properly?

\* How can patron and librarian assessments be combined?

\* How can we design more effective methods of obtaining feedback from users?

\* How is quality of service provided influenced by librarian attitudes concerning teaching and assisting students? How can you evaluate

librarian attitudes?

- \* How can we go beyond output

measures, which look only at information

supplied to users, and measure the

benefit of the service to the user (i.e.,

how did it affect the user's life)?

- \* Which reference evaluation

instruments are most effective in diagnosing

reference service problems and

appropriate changes in services to correct

problems?

- \* What are the major variables

influencing reference service quality?

Variables which should be studied

include: librarian knowledge of

sources, level of demand for service,

interpersonal interview skills, staff

training and education, morale and

motivation of reference librarians,

use of electronic vs. printed sources,

and teaching information sources vs.

providing the answer.

Library Users

- \* How should evaluations of reference

librarian service be appropriately

weighted? Balance results such as

locating needed information with other

outcomes (e.g., user satisfaction with

librarian helpfulness).

- \* Does patron satisfaction last over

time?

- \* How much do we know about users'

information-seeking behavior? What

implications does this behavior have

for rendering effective service?

- \* What do users assume about the

library's resources and services?

- \* What are users' expectations

concerning library resources and services?

How do those expectations compare with the library's vision for service programs?

\* Do patron expectations and behavior vary in relation to some identifiable variables? If so, what are the most influential variables? To what extent can libraries through their behavior (e.g., type of service offerings, organization of services, and service policies and procedures) shape and modify patron expectations and behavior? Just how much plasticity is there to patron expectations and behavior?

\* How much value does the mediation of a reference librarian add to patrons' information searches, and how much time does it save?

\* How well can patrons judge their success?

\* What conditions must exist for users to be motivated to learn how to use references sources rather than simply obtaining the desired information from the sources?

\* How many patrons follow-up on referrals? What conditions must exist for a patron to act on a referral? For patrons who do follow-up on referrals, how much of a difference does it make? How much added value do users receive for effort expended?

\* How successful are users who act on their own behalf?

\* It appears that, despite the complexity of libraries, most library users do not use reference services. If not, why

not?

## Reference Services New Program Development

### Types of Services Offered

\* What effect will emerging technology

have on the shape and mode of

delivery of reference services and,

consequently, on patron expectations and

patron assessments of effectiveness?

\* How will the development of expert

systems that can handle many of the

routine information questions

influence the nature of reference services?

\* As electronic information sources

proliferate, as their effective use

continues to require a broad knowledge of

the characteristics of various

databases and command languages, and

as options multiply, will reference

service abandon the desk and the walk-in

demand pattern it has known for

decades?

\* Will future reference service come to

resemble consultations between

clients and service providers in other

professions such as law or medicine?

If librarians lead in the direction of

research consultations by

appointment, will users follow? What is the

demand for and acceptance by users

of research consultations by

appointment as a supplement to reference

desk service? What conditions must

exist for users to be willing to wait for

service appointments?

\* Is the familiar on-demand, walk-up,

over-the-telephone arrangement for

providing reference service the most

effective way of doing it?

\* What is the most effective method of identifying target audiences for new services?

For all of these topics we need to ask the following questions:

\* What fields of study, in addition to library and information studies, might provide models of inquiry for seeking answers to such questions?

\* With what sort of specialists ought reference librarians and researchers collaborate to study these issues?

\* Does the answer to any research question differ when it is asked about a particular type of library, or a library in a particular country?

Through publication of research topics generated by the recent conference program, the Research and Statistics Committee hopes to stimulate research on reference effectiveness. As a follow up to the program, the Committee is sponsoring the Preconference on Reference Effectiveness (ALA Summer 1992 meeting in San Francisco) where refereed papers will address this understudied area.

#### REFERENCES AND NOTES

[1] This list of possible research topics was developed by the many participants in the July 1991 program titled "Unanswered Questions." However, the following people made major contributions to the ideas listed above: James Rettig, Margaret Joseph, Geraldine King, Eleanor Mathews, Marjorie Murfin, and Beth Sandore, as the program keynote speaker and group discussion leaders. Special thanks are also due to the following group discussion notetakers: Tom Cashore, Prudence Dalrymple, Kimberly Spyers Duran, Susan Klingberg, Virginia Moreland, David Null, Charles Patterson, Tom Tollman, and Marilyn Von Seggern.

Jo Bell Whitlatch, Chair 1990-1991 RASD Research and Statistics Committee.

#### Abstract:

A group brainstorming session was held at the July 1991 ALA conference to select topics for future reference service research. Topics were suggested in the general areas of collections, personnel management, evaluation of reference services and new program development.

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