

The service formerly known as reference: A changing paradigm

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Abstract

In difficult budget times, libraries make difficult decisions about reference services which can lead to sacrificing quality. Rather than closing desks, reference services can be reinvisioned, reimagined and reinvigorated. Attendees examined their individual and institutional philosophies of conducting student research assistance i.e. reference. Participants worked to 'backward engineer' their reference services and philosophy using central concepts from educational psychology, developmental psychology, learning theories, as well as evidence based librarianship. Participants were challenged to consider the way they, individually, and/or their institution 'does reference' using data collection and analysis that could justify or change their 'reference assumptions.' The central outcome of this session was for participants to articulate the assumptions that govern their own or their institution's reference work and consider the evidence/theory for underlying assumptions.

Introduction

In difficult budget times, libraries are asked or forced to make difficult decisions about reference services which can lead to sacrificing quality. Rather than closing desks, the service of research help can be reinvisioned, reimagined and reinvigorated. The session opened with a discussion question posed to the attendees: Is reference a service or a pedagogy? After discussion, attendees agreed that it can be both and is 'situational.'

Reference is changing

There are three main trends in academic libraries effecting reference models: distance education, increase in e-resources and the declining use of the reference desk. As more colleges offer online courses or full distance education programs, students prefer or need access to library resources virtually. This, along with other factors, have lead to an overall increase in the use of e-resources, by distance and traditional students, which has been correlated to decreased reference statistics. However, while ARL libraries have seen declines in their reference statistics, there has been an increase, at master's-level institutions (Applegate, 2007). In the last decade, chat or instant messaging (IM) virtual reference services have become widespread in academic libraries.

Learning theories

Identifying learning theories and educational psychology relevant to reference services should be a vital part of analyzing reference services. Many of the common practices and frequent observations by librarians during reference work can be traced back to the core concepts of theorists such as Jean Piaget (dis/equilibrium, empirical/reflexive abstraction), Lev Vygotsky

(zone of proximal development), John Dewey (learner's responsibility, and Paolo Friere (banking education, conscientization), and Ernst Glaserfeld (constructivism, décalage).

Evidence-based librarianship

The most common technique of data gathering utilized in libraries are satisfaction surveys. A popular survey utilized by many libraries is a proprietary survey, LIBQual+, that focuses on user opinions of library service quality. Although these satisfaction surveys can be helpful in measuring whether library users feel their needs are met, there are many other types of data and evidence that could be gathered in order to understand student information needs and to design library services.

The presenters proposed that librarians utilize evidence-based librarianship by collecting data and conducting analysis when making library decisions and creating policies in order to best serve library patrons. Evidence-based librarianship is modeled after evidence-based medicine in which systematic reviews and data are used to make patient health decisions (Eldredge, 2000). In addition to literature reviews, other types of evidence gathering and analysis were briefly discussed, such as: cost analysis, user feedback through focus groups and usability testing, chat transcript analysis, and ethnographic research methods.

Case Study

CSUSM Reference Model Shift

When the CSUSM Kellogg Library began re-structuring the reference unit to a tiered, or triage model, a core goal was that in all interactions, get the most effective person to assist the student. Prior to the restructure, librarians staffed a physical reference desk during most of open library hours. It was determined for basic questions (i.e. directional and technology), a trained student information assistant was ideal. For anything beyond basic questions, a reference librarian was best. In the case of complex, in-depth research projects, a subject specialist librarian would be more helpful to a student than the librarian that happened to be scheduled at that time.

At CSUSM, the physical reference desk is called a "Research Help Desk" (RHD) and is mainly staffed by student information assistants while an on-call librarian is monitoring virtual reference in their office. These students are highly and continually trained to assist library users with basic questions. If at any point during their interaction, it appears the user needs greater expertise, the on-call librarian is contacted to come out immediately. A strong 'referral culture' is also in place among the librarians. Should the librarian on-call determine that the student would be best assisted by the subject specialist, the student is advised as such. Many times, the subject specialist is immediately available and if not, contact information is given. Students follow-up at a high rate while sometimes the subject specialist will make the initial contact after the student's interaction with the Research Help Desk.

During the reference model shift, data collection was essential in order to guide implementation and for continual improvement of services. Student information assistants track each question asked at the RHD and mark down their librarian referrals. This data is evaluated

and discussed at weekly information assistant meetings. In the following section, data collected by librarians will be discussed.

Reference Data/Evidence gathering

As previously mentioned, CSUSM does not have a traditional "reference desk" and the shift occurred after a thorough analysis of reference statistics and examining library literature. In order to effectively deliver and to evaluate library reference service, data collection is vital. There are various ways in which reference data is captured by CSUSM reference librarians.

Individual librarians collect research consultation statistics outside of assigned on-call reference hours to capture subject specialist workload. Time spent working with students on in-depth research questions "off the desk" is closely related to information literacy instruction. This important student contact time can be documented for tenure/promotion files and other performance evaluations. Subject specialists note the inquiry, dates, type of involvement with course (instruction, web site, etc.), method of contact, and approximate time spent. A workshop participant suggested that such individual statistics could be used to train other reference librarians.

Librarians also track each "on-call" reference question by date/time, type of question, and method of contact. Previously done by hand, statistics tracking software is now used. At the end of each semester, compiled charts are created the number of questions by each reference hour and by week of the semester. This analysis identifies trends for high and low reference use which can be useful for double staffing during busy times. If there is a need to cut reference hours, which is becoming much more common with shrinking academic library budgets, it can be done when there are fewer questions in order to lower impact on student learning.

An example of an evidence based decision made at CSUSM was to no longer have scheduled reference hours on weekends after years of anecdotal experience that weekends were "slow" at the reference desk. Using "cost per question analysis," an entry-level librarian salary, the number of reference hours, and the average number of research questions, it was calculated that reference question "cost the library" \$56.68/per question from Monday to Friday. Because of low numbers of reference interactions on weekends, the average cost of a reference question was \$111.15/question on Saturdays and Sundays. This analysis provided justification to library administration that it was not efficient to schedule reference librarians on weekends.

More recently, as a result of the current budget issues in California and 2009-10 mandatory furloughs, CSUSM librarians needed to reduce their individual workload and cut reference hours. After analysis of reference data for a few years, the "on-call" reference hours with the lowest total interactions, "less busy times," were cut. Reference hours availability was further reduced in Spring 2010 after losing a reference librarian. In order to ensure the best reference service possible for our students, the CSUSM librarians continually participate in data gathering and analysis to make decisions.

Local Chat Reference Pilot

In May 2008, local chat reference was piloted as an additional access point for students to contact CSUSM librarians for research help. During the pilot, Meebo chat widgets (<http://www.meebo.com>) were placed on the library website home page and on the 'Ask A

Librarian' page. Librarians staffed Meebo any time they were on-call, but participation in the pilot was voluntary. Because the CSUSM reference model does not have librarians at a physical reference desk, librarians monitored Meebo from office computers and marked their status as "Away" when called out to the Research Help Desk for reference questions.

The Meebo pilot was very successful and local chat reference was made a permanent reference access point after data analysis (Ly and Carr, 2009). IM interactions comprised about 35% of total librarian reference interactions (including in-person, phone, and email) during the pilot period. 74% of the questions asked on chat were quick reference or in-depth research questions and student satisfaction surveys were very positive. Librarians and users found local chat reference to be a useful contact method. However, there were challenges with Meebo technology (outlined in Meulemans, et. al 2010) and now open-source IM software, Spark (<http://www.igniterealtime.org/projects/spark/index.jsp>), is utilized. Spark offers many features available with proprietary IM chat software (QuestionPoint, LibraryH3lp, etc.), such as question queues, multiple logins, and transfer of questions. Also, when chat is not available, the library home page chat form automatically switches to the librarian email form, which has lead to a sharp increase in email reference questions.

Conclusion

Following the CSUSM case study, session participants convened in small groups to discuss which of the learning theories or data gathering methods could be employed to analyze and reconsidered the various issues from participants own experiences in doing reference.

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