

REFERENCE AS A PLACE IN THE LIBRARY

Reading Rooms, Mixing Chambers, and Information Commons

Until the advent of the Internet, reference librarians depended solely on a print collection of reference titles. Because reference books are typically consulted for specific information and do not circulate, most library buildings have traditionally designated a reference area or reading room to house these titles and provide reference service. Though digital reference sources are proliferating, an encouraging trend in the past few years has been the restoration and refitting of classic reference or reading rooms. The Library of Congress, Harvard University, the New York Public Library, and other institutions have invested considerable sums in restoring and updating these physically impressive areas. These magnificent reading rooms represent the library as a seat of learning and scholarship and as a repository of recorded knowledge. Often incorporating a time-honored print collection (e.g., many of the titles described in this book), archetypal furnishings, and wireless technology, they combine past and present with oak tables and wireless networks, with classic print titles and computer screens, to provide a space that supports individual productivity and contemplation.

The concept of a reference area is also alive and well in new library buildings, though the area may no longer be called a “reference room.” The Seattle Public Library, for example, inaugurated an award-winning building that boasts a “Mixing Chamber.” In this 21st-century library space, glossy metal workstations have replaced stately oak tables, but at its essence, the Mixing Chamber sounds remarkably like a reference room (see Box 11.2)

BOX 11.2 THE MIXING CHAMBER

At the Seattle Public Library,

The 19,500-square-foot Mixing Chamber is where patrons go for help with general questions or in-depth research—a “trading floor for information.”

In the Mixing Chamber, librarians are able to serve patrons as a team. Staff members are equipped with wireless communication devices, which allow them to contact librarians in the Books Spiral for additional help. Librarians have nearby access to large reference collections and online resources, as well as a dumbwaiter to quickly deliver items from the Books Spiral.

The character of the space is silvery and high tech—the ceiling is black and the floor aluminum. This floor also has the largest configuration of technology in one spot—145 computers—and is the entry to the Books Spiral. The Quick Information Center provides telephone reference service on this floor. Ask a Librarian—virtual reference service via online chat also takes place here.

Description of the Seattle Public Library’s Mixing Chamber, http://www.spl.org/default.asp?pageID=branch_central_visit_floor&branchID=1.

Though computer workstations and wireless networks are a common feature, reference rooms were originally built around a print collection and remain generally conducive to solitary research. A different vision of library space, however, is embodied in the evolving notion of the *information commons*, particularly in academic libraries. Although definitions and terminology vary—for example, permutations include “learning commons” or “scholarly commons”—the concept generally refers to a designated area that provides a variety of digital resources, productivity tools, and other technologies to facilitate both research and production. The goal is to provide a place where users can find information, utilize computing and communications technologies, and obtain a variety of services, either individually or in groups.

The information commons includes a large number of computer workstations and a team of staff, including librarians, information technology specialists, and assistants, generally in partnership with the campus computing unit. Here, reference service is provided within the context of a holistic research experience. Users can explore, learn, and create using a variety of library resources and productivity software and other IT tools.³ Ideally, writing labs, advising centers, and other student services are also collocated into an area that expands the traditional notion of information or learning—or the library.

Will the information commons replace the reference room? Librarians ignore technology at their own peril and risk becoming curators of book museums if they

do not acknowledge evolving user preferences for accessing information and modes of working. A library is conceptually and substantively different from a computer lab, but partnerships between libraries and computing centers can capitalize on the respective strengths of each. The challenge for librarians is to create spaces and services that are flexible, responsive to user needs and preferences, and faithful to the principles on which libraries have been built.

Location of Reference Services

Although the place of reference within an information commons is a relatively new concern, the question of optimally configuring reference services within the library has long been debated. Large public and academic libraries frequently provide subject-based departments, such as business, genealogy and local history, music, and science and technology. Medium-sized libraries occasionally follow this model as well. Proponents of decentralized services cite advantages to library users, arguing that the quality of reference assistance is improved because subject specialists are better equipped to provide in-depth, subject-based service. With a smaller and more homogeneous unit, librarians enjoy greater autonomy and control, and user studies have indicated a preference for more focused units of library service and small, client-centered work groups. Proponents of centralizing reference also claim advantages to library users. By providing greater efficiency and fewer referrals elsewhere, libraries are able to extend service hours; offer more consistent availability of professional staff, particularly on nights and weekends; and reduce duplication of resources. As a matter of practicality, however, budgetary constraints often serve as the primary catalyst for reducing service points.

It is interesting to note that the debate over physical service points has cooled considerably in recent years as networking has shifted emphasis from the *location* of services to the *delivery* of services. Increasing demands on library budgets, coupled with increasing demand for networked collections and services, is causing librarians to rethink their library's physical organization. The user-centered library is the ultimate goal of library design. If librarians hope to attract and retain users, they must learn how users prefer to work and organize collections and services accordingly.

The Reference Desk: Critical Mass or Trivial Pursuit?

Historically, the focal point of the reference area is a desk, staffed by one or more librarians, in proximity to a reference collection that holds many of the titles described in this book. Long a cornerstone of reference service, to many the reference desk reflects the values that Charles Bunge and Chris Ferguson identify as being core to reference librarianship: convenient and equitable service to users, individually tailored personal assistance, and high professional standards.⁴ Patricia Swanson described the reference desk as representing a “critical mass of resources—human, printed, and now electronic, so configured for a convenient and predictable location so that library patrons can find the service and can find someone to help them.”⁵

Not all agree. Writing more than 25 years ago, Thelma Freides asserted that “by establishing the desk as the focal point of reader assistance, librarians not only expend professional time on trivial tasks, but also encourage the assumption that the

BOX 11.3

A GOOD USE OF PROFESSIONAL SKILLS?

“Every library that I have worked in over the last twenty-plus years has had at least one staff member grumbling about how often they have to give directions to the restroom . . . My question is this: Why grumble? This is our chance to shine, to invite people in. While it’s true that any trained monkey could point in the correct direction, I would like to believe that human beings aspire to be a bit more helpful than this. In the current economy, with declining numbers of reference transactions and dwindling budgets, every patron encounter is important.”

Lorraine J. Pellack, “First Impressions and Rethinking Restroom Questions.” *Reference & User Services Quarterly* 49 (Fall 2009): 4.

low-level, undemanding type of question handled most easily and naturally at the desk is the service norm.”⁶ Her studies of user behavior indicate that users do, in fact, perceive the reference desk as intended for quick replies. When the opportunity arises for providing detailed bibliographic assistance or research consultation, both user and librarian experience frustration when ringing phones and queues of users with short-answer questions compete for the librarian’s attention.

A review of library literature during the past two decades indicates that the desk has been the focus of much reflection. To many, it epitomizes problems with reference service: questionable use of staff expertise, dependence on a physical location, undifferentiated service, and unawareness of user needs. These critics charge that the ideal of the reference desk, staffed by competent professionals whose expertise is consistently challenged by informed library users, is elusive at best. Repetitive and routine questions, such as how to use the library catalog or, worse, how to fix a printer jam, ignore librarians’ expertise and contribute to job dissatisfaction. Some have questioned whether the reference desk makes users less self-sufficient and more dependent on library staff.

Although the necessity of a central desk staffed by librarians is best addressed within the context of individual libraries, as the next section illustrates, librarians are moving beyond discussions of furniture to meet the challenge of designing effective service models in a rapidly changing environment.

SERVICE MODELS

In designing the excellent service experience, librarians are rapidly adapting to changing practices of information access and use. A recent approach to service models in libraries of all types is the empathetic concern of designing the user experience.⁷ User experience pushes librarians to look at all elements (signage, desk

configuration, available resources) of in-person library service and all its components as well as virtual service and its components. Essentially, user experience design critiques the library's service anywhere the user interacts with any attribute of the library. The totality of in-person and virtual services produces a complete "experience" of service for the library. This next section looks at past and emerging models and the issues driving them.

In-Person Service

The holy grail of staffing a reference service is to maximize use of the librarian's expertise. One staffing model that attempts to achieve this, particularly in large public or research libraries, uses *tiered* service. Considerations underlying the notion of tiered service include optimizing the use of the librarian's time and expertise, reduction of stress and burnout, presentation of an appropriate professional image, and more efficient use of human resources. A separate service point, which may be called a help desk or information desk, staffed by paraprofessionals or students, is set up to address directional and quick-answer questions. Complex or in-depth questions are then referred to librarians at the reference desk. Ideally staffed by well-trained individuals who make informed referrals, a separate information desk, preferably near the entrance, can free librarians to focus on questions that require professional expertise.

Tiered service is not a panacea, however. Smaller libraries cannot always afford to designate separate staff and facilities for reference, let alone establish two or more service points. Experience shows that a separately staffed information desk requires a clearly defined mission and a considerable investment in training to operate successfully.⁸ Because the entire array of library resources is now available at each library desktop, it is difficult to define the limits of the assistance provided by staff at an information desk. The "simple/complex" dichotomy that once drove tiered service is increasingly blurred, and the public is rarely aware of the difference between the service points.⁹

The idea of eliminating a professionally staffed reference desk and replacing it with a *research consultation* service has received some traction, particularly in light of decreasing reference statistics. This model involves scheduling office hours or setting appointments when librarians can spend uninterrupted time working with a user to offer research assistance and targeted instruction. Although staff-intensive, research consultation takes optimal advantage of professional expertise, eliminates

BOX 11.4 **ONE SIZE DOES NOT FIT ALL!**

Discuss the comparative advantages and disadvantages of tiered service. Is it of primary benefit to users? To librarians? To both? Or to neither? Should librarians be divorced from routine library functions?

the competing demands that often accompany “on the fly” reference encounters, and offers librarians and users a more satisfying and productive encounter. In a much-discussed reorganization at Brandeis University Library several years ago, the reference desk was eliminated in favor of an information desk staffed by paraprofessionals and a research consultation service drawing exclusively on librarians with a combination of office hours and appointments. In an article evaluating this model, Douglas Herman concludes that the project is a “mildly qualified” success.

Though faculty and students enthusiastically endorse the consultation service, informed referrals are not always made from the information desk, and users might not have ready access to the librarians’ expertise.¹⁰ However, a more recent study, analyzing Dickinson College’s replacement of the reference desk with a consultation service, found the new service model to be beneficial to librarians as well as to users.¹¹ Other service configurations for desks include a “one desk” model whereby reference librarians answer research questions from the circulation desk; this introduces a seamless experience for the user in which one desk is a “one stop shop” for all the user’s information needs.¹² Models will depend on typology of user population as well as library size and mission. What works for a smaller public library may not find similar uptake in an academic setting of any size.

With the convergence of decreasing staff, a reduction in the number of reference questions, and virtual service (see later section), librarians will increasingly experiment with configuring their reference services in upcoming years. However it is configured, in-person reference service offers the personal assistance that most people value and provides a rich opportunity for instruction as well as research assistance as long as people are in the library. In a world of massive networked access to information and data, librarians must meet these users where they are (i.e., on campus, in the community, in cyberspace). To this end, reference librarians have ventured into “embedded librarianship” as well as cyberspace and accompanying social networking platforms as complements to traditional service.

Mobile Librarians and Embedded Service

Entrepreneurial and intrepid, reference and outreach librarians have moved outside the library building literally and virtually. Academic librarians in particular have moved beyond the desk by taking reference service to where users work. These “mobile” librarians move not only beyond the desk but also beyond the library, setting up outposts in student unions, academic departments, campus computing centers, undergraduate dormitories, and wherever their users gather or work. Reports of pilot projects by librarians from Rutgers University, University at Buffalo, and other university libraries describe these various outreach initiatives. Experiences vary, with some services in such sites as student centers and computing labs providing primarily quick-answer service, whereas others report that users indeed take advantage of the opportunity for research consultation.¹³ The common denominator of these efforts, however, is positive public relations for the library and the promotion of library research assistance to those who might otherwise be unaware of this service.

At a deeper level, Martin Kesselman and Sarah Watstein discuss the notion of the embedded librarian, who “brings the library and the librarian to the user, wherever they are . . . embedding themselves into research and learning environs.”¹⁴ These roles

BOX 11.5 EMBEDDED PUBLIC LIBRARIANS?

The literature on embedded librarians has mostly focused on academic libraries. Can public librarians be embedded as well?

include involvement in course-integrated instruction, participation in research teams, and collaboration with faculty in scholarly communication activities, and they offer exciting and professionally satisfying opportunities for librarians to share their expertise. If reference services could be plotted along a continuum, the embedded librarian represents the apex of successful outreach and user service.

Digital Reference Service

While librarians struggle to optimize service they provide to their respective communities, they are also keenly aware that large segments of their population never come through the library's doors. Digital reference service encompasses service that can be delivered at the user's point of need. This entails instant messaging (IM) reference services and SMS reference service (also referred to as a Text-a-Librarian service), as well as proprietary online chat platforms, known simply as chat. Twenty-first-century digital culture is such that most people now work and communicate primarily in front of a computer screen and spend a majority of their day connected to the online world. Digital reference service occurs online as a means to meet the needs of users where they are.

Variably referred to as *electronic*, *digital*, or *virtual* reference service, the salient feature is that communication between user and librarian takes place online. Virtual reference services developed in response to a number of interrelated factors: the ubiquitous popularity of the Internet as an avenue of communication, increasing availability of networked digital resources and the corresponding need for service, reports of decreasing numbers of in-person reference transactions, and librarians' continuing efforts to respond to user preferences. As illustrated by the number of articles and programs it has generated, virtual reference has sparked a lively discussion within the profession.¹⁵ Proponents wax enthusiastic about increased responsiveness and outreach capabilities, and opponents decry the decline of the reference interview and increased reliance on online sources. Nonetheless, librarians are increasingly embracing virtual reference, not as a substitute for traditional service, but simply as another means of reaching users. As with in-person service, however, different models of virtual service have developed in response to varying user needs, philosophies of service, and staff resources.

Asynchronous versus Synchronous

The two basic modes of digital service, asynchronous and synchronous, differ substantially in their immediacy, interactivity, and cost. Asynchronous service—that

is, service via e-mail—offers many immediate advantages. Software costs are negligible, and the medium is familiar to nearly all users of the Internet. It offers advantages to users who are less technically savvy or who use slow Internet connections. Likewise, users with limited English skills or typing skills might prefer composing at their own pace. This service works particularly well for short-answer or known-item questions: How can I reach the local Internal Revenue Service office? Does the library have any travel books on Belize? A short answer, however, does not necessarily translate to a short amount of time spent finding the answer. As librarians know, a considerable amount of time might be spent in tracking down an address, determining a death date, finding a specific poem, and so forth. Thus, from the librarian's perspective, communicating via e-mail provides an opportunity to work on a question with less time pressure, eliminates telephone tag, and lends itself well to collaborating with colleagues.

On the downside, e-mail does not lend itself well to instructing users in finding or using resources on their own, and questions received via e-mail can be maddeningly vague or open-ended. Though it is possible to engage in a reference interview through a series of e-mail exchanges and clarifications, efficiency and effectiveness can be compromised.

Synchronous reference service offers a partial solution. Though "chat" service implies a casual conversation, in its more sophisticated incarnations, it has the potential to provide a more effective communication and learning tool than e-mail. Useful as a means of humanizing and enhancing online communication, chat can facilitate collaboration between the user and the librarian, particularly through the co-browse feature. In this scenario, the librarian can share screens with users, guiding them to appropriate databases and teaching effective search strategies.

The ideal and the reality, however, are often at odds. Librarians frequently experience frustration with software performance: connections are inexplicably dropped, co-browsing or other features do not work, and users have a difficult time following what is happening. Taking a "less is more" approach, some librarians have adopted instant messaging as a medium for providing real-time reference.¹⁶ Here, librarians are taking advantage of a popular method of communicating via computer. At its most basic level, IM is considerably less sophisticated than chat software, but it offers the advantage of ease of use, speed, reliability, and negligible cost. Though this medium is not optimal for every type of question or every type of user, it offers a good opportunity for librarians to investigate real-time reference service without a significant investment in software.

In further lowering the barriers of online direct engagement with librarians, widgets can be used to create near instant communication. Chat widgets are made up of snippets of HTML code that can be dropped into a library's reference department Web page in order to connect the user directly with that reference staff's IM window. This immediacy of reference service is a new way to engage with users as they experience a service at their point of need.

Librarians are justifiably concerned with the video quality of the user's virtual experience when compared with face-to-face transactions. To that end, some librarians experiment with video chat reference service, and one pilot use is Skype reference services. Skype is a type of video conferencing service whereby librarians and users can converse over video chat, with librarians setting up video kiosks to answer

reference queries from users at a distance. Skype applications exist for the iPhone and other mobile devices such that users may be able to get nearly the same type of video service virtually as is available in person. The same network issues may arise with this service as well; that is, depending on the stability of the connection, users may get dropped, or quality may become poor if the user is on a low-bandwidth connection for video chat.

Delivering virtual reference service poses unique opportunities and challenges. Although reference librarians have long grappled with issues such as the level of service that will be offered, the clientele who will be served, the length of time spent on a specific question, how and where to staff, and user privacy and confidentiality, virtual reference brings these questions into sharper relief. When users are physically present, question negotiation and user–librarian collaboration tend to be more straightforward. In the virtual environment, however, responsibilities are more ambiguous, questions can consume significantly more time, users may have unrealistic expectations, staff levels may be too thin to consistently staff virtual reference, and transcripts potentially pose risks to user privacy. On the other hand, users appear to be enthusiastic about the service, and it is gratifying to be considered “awesome.”¹⁷ As with in-person transactions, there is no “best” way to run a virtual service, and each institution ultimately needs to establish a model and policies that work for its users.