

If We Change It – Will They Come?

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The conference theme, “Recognizing the Success of Reference,” seems to call for a celebration. We would definitely want to celebrate if we have achieved what we entered this profession to accomplish. We strive to bring people and ideas and knowledge together to meet an individual’s information needs and desires. But I would suggest a certain amount of caution. Would you characterize reference in your academic, school, or public library as being successful? How do you know? Are you sure? And when did you last revisit your definition of success, anyway?

I recall a time when I was speaking a great deal about adult literacy and how libraries might help to deal with this national challenge. I adapted a speech title at the time that might be relevant to today’s discussion – “If the answer is literacy, what is the question?”

Perhaps the added question is more about the change in the person that we strive to serve in the library today. Our categories—academic, school, public—all keep us segregated into false silos of attention and thinking. This reinforces the view our customers have of us as being less-essential than Google and other sources of information. Libraries are often viewed as an option of last resort for those seeking information. But we all share a common priority--to provide consistently high quality service to our customers. A conference like today’s brings us together in a way only few such opportunities afford for broader discussion and understanding of our shared challenges.

Libraries represent a fundamental public good in our democracy. They assure the right, privilege, and the ability of an individual to choose and pursue any direction of thought, study, or action one wishes. Libraries provide the capital necessary for us to understand the past, operate successfully in the present, and plan for the future. They are also our collective memory, since history and human experience are best preserved in writing and in the types of cultural materials that libraries collect. But to be relevant into the future, libraries must be dedicated to understand and serve their diverse communities. They must reflect those communities, advocate and support the use of appropriate technologies, build

excellent collections, have a staff that is committed to serving the library's customers¹, and be committed to the very highest ideals of library service.

We must believe deeply in equity and in our fundamental role in empowering people to take charge of their lives, their governments, and their communities. If we do this, we fulfill the essential role we should play in the community, on the campus, and in the classroom. The collections we build, the access we provide, and the technologies that we embrace will help move people in our communities – and our society at large -- into more productive and creative futures.

Can we agree that we share a set of common values? Are we service-oriented, designing services and programs that are both relevant and responsive to people's needs? Are we customer-oriented, concentrating on and responding to the needs that have been and are expressed by our customers? Do we create programs that are relevant to the needs of our academic and public communities?

Do we value quality service and work to provide staff with the tools they need to maintain quality? Do we use appropriate technology and electronic tools to identify and meet the needs of customers and to bring customers into our buildings and electronic spaces? Do we anticipate and service the individual needs of our customers in their pursuit of knowledge and information delivered when and where they want it to be delivered? Do we value teamwork and collaboration and work effectively, ethically, and efficiently?

Reactions to these values are always interesting to me. I am often hit with the comment, "Well, don't you value librarians any more?" Of course I do; librarians are the fundamental glue holding this all together. It is not that we value our customers more than librarians. We are the engines that bring static packages of knowledge and bytes of information into scope and context, making them useable. And librarians answer questions, give advice and counsel. Our library places allow for solitude and reflection. We are beginning to understand, however, that as the world's knowledge becomes a network accessible to a large part of the world, we will not exist unless we too are accessible.

Beyond these common values, why are we here today? When I scan the agenda, I see that it is filled with the topics and concerns in which we should be interested. But let's stand back a moment from specific issues and think about the context in which we provide reference services today.

If we are truly customer-centered, we will guide customers at their point of need to resources that accelerate the process of identifying and retrieving information for study or personal use any time, any place. But have we changed our physical or virtual libraries and modified our service portfolios to do just that?

We still schedule ourselves at reference desks; hide behind both print collections and our desks, shy away from customer engagement. We argue that collections must be next to us in order to give good service. When we designed our traditional reference rooms, we did

¹ The author will use the term "customer" to refer to user, client, patron, or other term for one who uses the library and its services. Its use is not meant as a value judgment or preference.

not have the digital nor electronic environment. Young people who did not have our models for service must expand beyond what has been to what can be like the unexamined life; unexamined constricts become stale.

Students did not have IPODs or laptops. They often studied alone, wanting total solitude. There was no wireless access nor licenses to huge databanks of journals and other literature. All this has changed—along with the customers we serve—individuals who are more sophisticated, technologically oriented, time-strapped, and consumer-oriented. Today's users expect and demand more of us. And what have we done? To what extent have we met and anticipated their needs?

We have taken incremental, small steps by experimenting with email and virtual reference. But it seems we have added these services on top of all existing models and then complained that we have too much to do. I suggest to you that we have not been bold in redefining our priorities or in reconfiguring our services. We have not been bold in our positioning. We do not understand that electronic reference is a new paradigm. We have viewed it just like in-person or telephone reference, only in an online environment. But is this how the user approaches electronic reference? The information need and service scope may be entirely different and may require entirely new approaches.

While at Queens Library, we created a new paradigm. We created our first self-service branches by removing the circulation and reference desks. Librarians took to the “stacks” and interacted with customers at point of contact. We went to them; they did not have to approach a seated librarian who was paying attention to something else. We began to ask them, “Can we help you?” instead of waiting for them to approach us and ask for help.

Can we transform the academic library environment similarly, to interact with faculty and students on their terms instead of our own? Can we meet users in the setting where they each learn? At its simplest, this is customer-centered service.

The UCLA Library initiated its Digital Reference Service in April 2000, spearheaded by a group of seven librarians representing the College, Biomedical, and Research Libraries. Working with the 24/7 Reference Project of the Metropolitan Cooperative Library System (MCLS), they were given the charge to test the E-gain software's ability to work with the library's electronic indexes, full-text journals, and other electronic resources. It was envisioned that the software would extend the service beyond the walls of the library and beyond the hours of in-person reference service.

The service was implemented in April 2001 for 10 hours per week. Primary access was through a graphic linking to it located on the College and Biomedical home pages. By the spring quarter of 2004, service was available 46 hours per week; more than 40 staff members from 8 units had been trained; the “Need Help? Ask a Librarian” graphic was located on every central library web page, the Library Catalog, e-Reserves, and UC E-links on article databases; and 649 calls were fielded. Customers have clicked in from within the libraries, at computing labs across the campus, in campus offices and dorm rooms, at home,

and while doing field study in other countries.² Feedback from the customers who have used the service has been enthusiastic and positive to both the convenience of getting help while they are online and to the chat and escort technology.

In August of 2004, the Digital Reference Task Force stood back and assessed the Library's progress in implementing this new service. The resulting report addressed the successes of the program but also pointed out a number of issues, including quality of service, staffing, and administration.

The group proposed a new triage model for digital reference that was recommended and has been implemented. The model groups digital reference questions into three broad categories: 1) directional and inquiry; 2) strategy and tutorial; and 3) research assistance. Triage is done by library assistants at the first level, with directional and inquiry questions. General questions regarding library policies and services and technical and connectivity issues are answered here. Questions requiring further expertise with strategy or database selection are sent to the 2nd level librarian. Those requiring subject expertise are sent to the appropriate 3rd level subject specialist.³ But if the 2nd level librarian or 3rd level subject specialist is not also online, I can not help but feel that the customer is not well served in a virtual environment.

In reviewing UCLA's experience--not much different than that of other institutions I suspect--the greatest concern I have as University Librarian is that our digital reference service is not well integrated into the philosophy of reference and research support across the library units and does not carry the visibility in our virtual space that our traditional reference service has to someone coming into our buildings. Digital reference service is not well integrated into either our service portfolio across the library units or into our virtual portfolio. Because the hours of virtual reference service parallel the same hours of our reference service desks in the library units, we have not created a 24/7 presence for our customers, which is the promise of the online environment.

The Digital Reference Steering Committee transitioned to QuestionPoint during the summer of 2005. The Steering Committee was also working to stabilize the structure of the service with the new AUL for Research and Instructional Services. At the same time, the Group shared the results of their work with the UC Heads of Public Services for discussion across the entire UC system.⁴

I would like to leave those considerations for a moment, however, and ask you to think about the core components of customer-centered reference service. With Sarah Watstein's arrival at UCLA as the Associate University Librarian for Research and Instructional Services, we have focused on the context of how we provide our services. Sarah and I are committed to building and supporting customer-centered research and instructional services in both our physical and virtual spaces. Customer-centered reference service will concentrate on several elements.

² Milestones: Digital Reference at UCLA, May 2003.

³ Digital Reference at UCLA. Working Group Recommendations, August 2004.

⁴ Digital Reference Service at UCLA, Annual Report for 2004/2005.

Such services should be responsive, recognizing and responding to different customers' needs and learning styles. We need to empower customers to become increasingly independent users of information and knowledge resources. Whenever possible, staff should proactively take the opportunity to help customers refine their inquiries, understand the range of available tools for answering questions, select and evaluate appropriate resources that will help them discover the rich collections of the library, identify and use electronic and print tools, formulate research strategies, and locate research materials worldwide. And of course, they should also answer specific informational questions. Our role is a facilitative one.

For services to be high quality, they must be delivered by a knowledgeable and well-trained staff that provides accurate, comprehensive information to customers. Answers to questions will be cited from printed or electronic resources, and staff will not offer their own interpretations or opinions regarding the information provided. Any opinions that are offered will be within the staff member's area of library expertise and will be identified as such when offered.

Customers will come to rely on services supported by established policies and procedures for access and services that treat all customers in a consistent manner. Services will be standards-based, treating all customers with courtesy, dignity, and respect by library staff who are approachable and who communicate in a receptive, cordial, and encouraging manner and who make each reference interaction as simple, enjoyable, and positive as possible. Staff will listen attentively and respond to each question or concern.

We will build systems for feedback, monitoring, and assessment in order to monitor the quality of research and information services provided to see that they meet or exceed customer needs. We will invite customers to offer feedback and recommendations regarding public services and will respond to this feedback in an appropriate and timely manner.⁵

As we restructure our services within constant budget restraints, we face challenging questions and concerns. Foremost among them for me is how we redeploy our efforts to balance the reference, research, and instructional services that we provide in our traditional physical spaces and those we provide in our virtual spaces. A recent quick survey of UCLA graduate students revealed that 63% of those responding came to the Research Library once a week or more often. An additional 17% came once a month or more.⁶ Seventy-four percent of those responding were continuing or returning graduate students. This cohort of graduate students still values the physical presence of the library in the academic experience.

On the other hand, we know that many graduate students live within their virtual environments and engage the library's resources in their dorm rooms, offices, and research laboratories. This is an element of the reality that the traditional graduate student no longer exists in American higher education. Often without knowing it, they enter the virtual library and access journal articles, databases, and other electronic services. They communicate by email, blogs, and listservs. They are gamers who are focused on the game. They build and

⁵ Watstein, Sarah. *Got service? Thinking Service Forward at the UCLA Library, Core Components*. June 7, 2005

⁶ Charles E. Young Research Library Space and Service Design Survey. October 10, 2005.

support virtual communities that are relevant to them personally and professionally. They walk between classes text-messaging with friends and colleagues. They access course management systems that deliver rich library content embedded in course curricula. They multi-task—studying, listening to music, text-messaging friends and family, word process, and plan social activities—all at the same time. And their role as “graduate student” is one of many they fulfill.

The emergence of commercial reference and tutoring services, such as Tutor.com, are a mouse click away for the enterprising student or parent. Many public libraries have embraced this type of service, realizing that students relate well to the virtual environment and that an individual library cannot provide this level of personalized service. What are the implications of this service for the academic library environment, especially for serving undergraduate students?

Given this context, the development of a digital reference service that will be relevant or used by students in the future must be our goal. There are a number of questions that deserve discussion and consideration during this conference and in each of our home libraries.

- Do libraries position themselves to relate to users who do not come into their buildings?
- What are the criteria that we are using to determine whether our reference service is being successful, when we all admit that the numbers of questions and customer contacts are decreasing?
- Should we create virtual communities for live interchange embedded within course management systems that allow undergraduates to interact with each other and draw qualified librarians into the discussion? How will virtual reference be integrated into the development of course management systems such as SAKAI?
- Do we brand and provide links to reference service from many locations in our web sites?
- How do we ensure customer privacy?
- Will we provide services in languages other than English?
- Are customers satisfied with the digital reference service they receive? Is it the first thought for answers when a customer has a question?
- What would quality reference service look like in our virtual space?
- Have we designed web spaces that address usability and provide rich content?
- Have we integrated our search options to include appropriate connections with Google Scholar, Google Print, Yahoo, and discipline-based search engines with links to the library’s resources and to interlibrary loan systems?
- Can we collaborate to provide a true national 24/7 service?
- Have we addressed all of the issues surrounding intellectual property rights?
- Have we built pathways into our institutional repositories that are relevant to students and faculty?
- Have we built online tutorials that assist customers in accessing and using library collections?

- Are we proactively projecting our services into the settings, physical and virtual, where our users are most likely to look for them?
- What can we learn from the knowledge management discipline that helps us deliver virtual services based on intelligent databases and integrated systems that automatically triage customer needs?
- Are we developing virtual reference and research support for emerging fields in eScience and interdisciplinary study?

There are no easy answers to these questions, but in our quest to design and deliver services that make a difference, services that are inherently successful today and tomorrow, we must ask them. There are likely no formula answers, either, which any library could take, add water, stir, and create the silver bullet. By not thinking creatively about solutions in our virtual space, we risk not only losing customers, but also becoming less and less relevant and more and more marginalized. The competition and the cultural landscape can push us quickly to the periphery in our communities and on our campuses.

I have often spoken of passion about our profession in talks such as these. And I want to end with thoughts about that today. I believe passionately that libraries and librarians are essential to our democracy and to our communities and campuses. I firmly believe that we hold the keys to enrich another person's life through the resources we collect, organize, and make accessible. I also believe we are capable of making a difference in the experience that an individual has in seeking information and knowledge. As we strive to explore our futures together, we must indeed stop to celebrate our contributions and successes, but we must also question how we initiate radical change to meet up with--and indeed pace, our future. Some of us who can't make this transition need to get out of the way and let the change take place. To do any less is giving up. While we celebrate, we must be careful to not let the world go by us. Are you ready to celebrate? Are you ready to question our service models and philosophies? I challenge you to pick up the gauntlet and join me in what promises to be an exciting - - albeit urgent -- exploration of our future.

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