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Delivering Reference Services to Users Outside the library

This paper came about when I helped facilitate a workshop on point-of-need reference services to remote library users. This was a preconference workshop before Online and OnDisc in January this year and it was led by Anne Lipow – I was inspired by her ideas at this and then later at her keynote address at the conference. She is passionate about the need for librarians to get out to the clients who are coming in to libraries less and less because of the Internet.

I will quote a few statements from her keynote address to summarise what she is saying:

"…we must become pivotally involved in providing point-of-need reference service to information seekers at the point where they are when they have a question."

"By aggressively and imaginatively repositioning ourselves to provide immediate, interactive point-of-need service to remote users – whether they are in or out of the library, whether the library is open or closed – we will not only be doing right by our clients, but we will also ensure the flourishing of a grand diversity in information services" (and thus help us keep our jobs! KS)

"…rather than thinking of our users as remote, we should recognise that it is we who are remote from our users."

Anne has put up the challenge and this paper is about the implications of putting it into practice.

There are different options for the type of services that can be offered to "remote clients" an email reference service or desktop video. Many libraries offer an email service from their home page which allows library users to email a reference question to the library. The CSU library is no exception and the service is used to request literature searches and questions about the library service. This is a way to reach out to users, and allows librarians to answer questions in a time that suits them. I want to concentrate on "point of need" services in this paper because the issues relating to this are much more difficult and challenging and involve considerably more than putting an email address behind the link to "Ask a Librarian". "Point of need" service means that when the person requires help they can communicate with another person who can help them. This is done over the internet using desktop video technology which allows for real time interaction when the person actually has the information need.

Charles Sturt University is a small, multi campus, regional university. It is the largest supplier of distance education in Australia with more than half its students studying by this mode. The internet is utilised as much as possible to provide the education, student administration and the library service. We offer a standard reference service to students and staff who come into the library. The internet is changing access to the information and they
can do much of their searching away from the library. Distance education students often
don’t have the luxury of being able to come into a library at all and we offer a freecall phone
service when the library is operational and an email "Ask a librarian" service. The bulk of
time taken in reference enquiries at the Bathurst campus involves showing people how to use
databases, the internet and catalogue to find information for assignments. Ready reference
still accounts for a sizeable proportion of enquiries but the large proportion of time is spent
on teaching. The nature of the reference enquiry will affect the day to day activity of a remote
reference service.

My motivation to think about a remote reference services comes from the image I have the
image of a student studying by distance, getting onto the internet to use databases late at night
when the kids have gone to bed and they can finally get time to study then wasting time due
to inefficient searching. This would cause high levels of frustration in an already difficult
situation. I get feedback when I give classes during residential schools that searching
databases without any assistance is problematic and inefficient for quite a few students. My
vision is to offer an interactive, convenient service for these students to make studying
slightly less of a hassle and hopefully keep them studying with us.

That is my "pie in the sky" vision. On a more manageable level we have undertaken a project
to test the viability of a remote reference service. At CSU we have a need for a real time
remote reference service between our "Interactive Learning Centre" at Dubbo and the library
at Bathurst. The new centre is being created at Dubbo to allow locally based CSU students to
use CSU resources to help them study. This really means using the Internet as much as
possible to deliver teaching. Online library resources are an important part of this and the
students have access to the catalogue and databases – as do all of our students. The centre is
staffed by a receptionist and a study skills adviser, no other teaching staff or librarians. The
study skills officer is often in the position of helping students to use databases but he feels
unqualified to help. The support of librarians to do this part of the work is very relevant in the
absence of local qualified staff.

In May 99 we put together a proposal for a project using netmeeting to conduct these
interactions. The proposal is attached. At the time of writing there had been a small number
of reference interactions using the technology and they were deemed very successful by all
participants - the librarian, student and study skills advisor. This technology is not perfect but
it is quite reasonable to pursue it as a way of solving the problem of providing a library
service to off campus students.

Netmeeting is a free Microsoft product that allows interaction between computers on the
Internet. It allows for a video image; sound; typed chat; whiteboard but most usefully it
allows for sharing programs. This means that a student could be searching the databases and
the librarian can look at what they have done and suggest different approaches to searching. It
lends itself to the teaching part of a university reference service and less so to ready reference
questions. Netmeeting isn’t the only program for this job or the best, but it seems to do the
job adequately and is appropriate for the trial.

Having said that I am going to present some issues and challenges to implementing this
service – a person to person virtual information desk. The issues I want to discuss include
technology issues; the impact on the actual reference service and staffing issues.
What technology issues affect the service.

Bandwidth.

At our Dubbo campus there is a microwave link between the two campuses which means we have large amounts of bandwidth. One of the CSU lecturers has very successfully given classes from Bathurst to groups of students at Dubbo. Bandwidth tends to be the word that comes to the mind of IT people when you mention Netmeeting. An internet search produced a document that showed how much bandwidth Netmeeting actually uses. It uses large amounts but for very brief amounts of time. It doesn’t hog the bandwidth, but is sporadic, according to the interactions. If used over a modem it is slower because there is less available bandwidth. Articles that discuss interactive reference services written in 1995/96 relate clunky technology as a factor in the service’s success or lack of it. This has improved by 1999 and will improve further with time, especially as business starts using it.

Will our users have this technology on their computers?

The reason we are using Netmeeting in our project is that it is free, it even comes as part of Windows 98. The most basic part of the service is easily available to students with current technology. You can’t offer this service if the people don’t have the software at their end. The camera is an add on. The image is relevant to establish a social presence but is not really necessary to ensure the success of the service. Sound is more essential to add the personal touch and also to add an extra, important layer of communication.

One of the problems, of course, is if the remote student is having trouble using the databases because they are technophobic, then they probably won’t be rushing to use NetMeeting. I believe that email is a transparent technology, everyone seems to be comfortable using it. "Chat" is another technology that has been embraced by people using the Internet. It is not especially appropriate for this purpose because you can't share applications. The only advantage is to offer a real time presence. When desktop video becomes "transparent" then we can expect it to start taking off and "virtually" replacing our information desks.

The ramifications for the reference interview and reference service.

The small experience I have had with remote reference showed that it has the potential to be successful. The first interaction occurred when a training time was set up with the study skills advisor to see if nm actually worked. He happened to have a student who needed help there and then so the training session turned in to a full-on Netmeeting reference consultation. As is common at this institution, it turned in to a session about searching databases. Some
observations that I made at the time include that video wasn’t essential but audio is. We didn’t have a camera at either end and that did not seem to cause problems.

Sound is required if a successful reference interview can occur, this means that a microphone is needed at both ends. Without sound the process would be too cumbersome so if a microphone wasn’t available then phone would need to be used which could become quite expensive.

The video image is not responsive enough to offer non verbal cues, it presents a face – it is good for social purposes but doesn’t do much more and can disappear after a short amount of time.

If we are going to conduct reference services over the internet both participants need to be comfortable with the technology and realise its limitations. At the information desk the reference librarian can sense from their stance and other visual cues that a person is nervous, confident etc We are not given this information using netmeeting. This has to be gauged through the interview and is why the audio component is important. It is not as much for the tone of the voice for non verbal cues as to be able to say the little things that help draw the person out. Also the reiterating that is required by a ref interview would become agonizing when it was typed out with text chat.

If you help someone at the information desk, we can set them up with a search and then leave them and come back later – it was difficult to find that moment using netmeeting. It will be important to be able to leave the session and then come back to it to see how the person is going or present them with suggestions of information resources.

The nature of the question.

Does it require that we present the client with information or show them how to use it? If we are presenting them with the answer to a question, we will often need to get offline to find it first. Unless it is something we can point them straight to we are going to have to do a bit of searching. The presence of the client at the information desk can sometimes be a bit of a hindrance but both the client and the librarian live with that situation. I can imagine (but at the time of writing hadn’t done it) if the client is sitting watching the screen as I am searching around I will feel very self conscious. We may also need to go to the shelves to find information (!) It will probably become common practice to put the client on hold and get back to them or possibly email the answer.

How skilled are reference librarians at using the internet to answer questions?

Although by no means always the case, more and more, the librarian will be on an even keel with the client who is internet savvy and has already checked search engines and other resources to attempt to answer the question before asking for help. There is a logic to the organisation of the library that means that a librarian could work out where something is by understanding the system – the internet throws that out the window. We need to stay one step ahead of the general public regarding information retrieval using the internet – that is easier
said than done in a user friendly, accessible information scene. With more demands being placed on our time we have less time available to surf the net to find potentially useful resources.

**Staffing and management implications**

The new technology. The Internet is very new, there is no parallel in history for a digital reference service. Our work patterns, as reference librarians have centred around an information desk, a phone and recently email. To double up with a parallel service requires a changing mindset from management right down to the reference librarians who will do the work.

It is easy to put our distant/remote clients out of our minds and deal with only those who are "in our face". We have to change our thinking to offer a service to these invisible clients. It is easy to respond to those who come to the desk – less easy when we can’t see them and they can’t see us. It might pay us to learn from techniques used in target marketing to work out how to get the service to potential clients.

It is vital that we actively promote the service. Clients who use the Internet to "go" to our libraries must feel as able to use the "Information Desk" as those who physically come in. The "Information Desk" must be as prominent on the Internet as it is in the library. We need clear, friendly icons that stay visible wherever you are on a library site.

We can become less bound by our building as well, the technology offers us opportunities to work from home if we are happy to only use the internet in our information searching. In the case of CSU, librarians at all campuses could be timetabled for the service, it doesn’t matter to the client where the person they are speaking to is sitting.

If we provide a remote reference service as well as our standard information desk, the same amount of staff are required to do twice the amount of rostered work. We can assume that we won’t get more staff to do it so we will be doing a new job as well as our old one. Have we got time? The nature of reference work is that the better the service the more busy we will be. While we are at it we could also analyse the work we do, how long it takes us and then prioritise it. We also need to ask ourselves why we are even offering the service and what is our competitive edge as information retrieval experts in this changing environment.
The bigger picture – providing a 24 hour a day, 7 day a week (24 x 7) service

At CSU this is particularly relevant because we have students studying out of business hours as well as off shore students. To offer a longer service means either co-operating with similar institutions around the world in different time zones or changing our work patterns to include night shifts. Either option requires substantial infrastructure change by management. To create a co-operative arrangement we need to identify organisations in the different time zones and obtain their commitment to serving our clients. (Among other things, this raises authentication issues.) In the spirit of co-operation we would need to be committed to serving the clients of other institutions, but not in a reciprocal arrangement. Our students might be assisted by a university in Perth, but we would be helping students at a different university in New Zealand. Requests would come in during busy times, and management and library have to be prepared to give priority to invisible clients who are not even our own!!!!

Conclusion

I have outlined some of the practical issues with implementing a point of need reference service to library clients for whom the library is remote. Although I haven’t got the answers, most of these issues are not insurmountable it is quite feasible to offer this type of service and it will get easier as the technology becomes more streamlined.

The biggest hurdle is the psychological barrier that the client is not "in our face" and therefore easy to ignore. We need to change our mindset to have the attitude that these clients are as relevant and important as the clients we can see. As people can find their information without coming into libraries it is in our interest to be provide an in their face reference service.