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Preface

Skill Sets

Reference and Information Services, third Edition, is about skills, resources, and best practices. Reference service has become much more complex and is in a constant state of flux.

The process of maturing into a worthy reference librarian, skill set by skill set, is challenging, unending, hugely rewarding, and, yes, fun. In this book, we identify these skill sets, analyze them, break them into their component parts, and present them to you, the eternally maturing reference librarian, in ways that are reproducible. The first and second editions of this book were dedicated to the intrepid librarian because the reference librarian at the start of the twenty-first century had to, above all else, be fearless in the face of a technology revolution. His third edition is dedicated to the entrepreneurial librarian who must continually think outside of the box and look for trends and technology that can be adapted to the library setting.

Ambiguity, never a stranger to the field of librarianship in general and information studies in particular, seems particularly acute in the face of dramatic new technologies fostering equally dramatic new ways of doing reference. Google has completed the prodigious digitization of over 20 million manuscripts available for open reference, even as Twitter continues peeping out reedy 140-character reference posts. The solid old desk, across which the static transaction of reference questions and answers was conducted, is being elbowed out or entirely replaced by virtual reference, reference consultation services, “learning Commons,” roving librarians, and mobile technology. Real-life librarians have spawned virtual reference librarians within the dense proliferation of social networks like Facebook. Online searching skills, techniques, and interpretation have overtaken resource-based reference and are imperative to effective reference services in all libraries.

The ferocious pace of change has compelled us to write yet another new edition to update and replace the sources listed in the second edition. Search skills required to locate newly digitized government documents, for example, bear little resemblance to searches through the voluminous GPo publications of a few years ago. A n augural job listing by the New York Public Library included this as one of its performance expectations: a knowledge of the library as a “location where new and emerging information technologies and resources are combined with traditional sources of knowledge in a user-focused, service-rich environment.

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that supports today’s social and educational patterns of learning, teaching, and research.” No pressure intended.

The professional reference librarian must commit to an ongoing understanding of the fundamental concepts, essential resources, search techniques, and managerial tasks inherent to reference, which are underwritten in large part by the wider social and educational patterns of information and research. The chapters contained in this edition support that commitment, even as they ease the pressure of trying to know too much without organized skill sets. The larger universe, where the primacy of information has never been felt more acutely, is kept in strict perspective throughout the text. The updated chapter on reference 2.0 tools introduced in the second edition now captures more of the restless mutability of emerging technologies and alerts the reference professional to experimental trends and practices that are utilizing new technology in innovative ways. More important, it acknowledges the maturing of virtual reference and the continually rising expectations of the user to access information freely, instantaneously, and often using mobile devices. The chapter on reference work with children and young adults, completely rewritten for this edition, reflects the importance of developmentally appropriate reference resources, a timely mirror to the global emphasis being placed on the relevance of information-seeking behavior at all stages of human development. A new chapter on ethics adds a critical framework for reference librarians having to function within the somewhat unseen but treacherous shoals of information copyright issues and professional codes of conduct.

The role of reference librarians as “information trust agents” cannot be underestimated in a universe of unending and complex information transactions. This chapter aims to anchor the expected rules of conduct and alert reference librarians to areas of vulnerability.

While earlier editions provided a mix of print and e-resources, this third edition spotlights electronic resources, in deference to the primacy of online searching over resource-based reference. The book continues to provide free web resources of depth and value useful for budget-conscious institutions faced with continuing global recession, along with a listing of mobile apps available for smartphones, iPads, and other mobile technology. This text also incorporates the valued suggestions of practitioners, including the adoption of the suggestion by an LIS faculty member to provide the uninitiated student with a comprehensive idea of the immense diversity in reference resources through an accessible list of outstanding reference resources, so that a list of selected titles appears as an appendix. What worked effectively for the first two editions remains but is enhanced with necessary updates. We have taken care to both cull and expand the hundreds of resources listed in the text, with amendments and supplements offered as a Web Extra (http://www.neal-schuman.com/reference-information-services-3E/).

Each of the chapters on resources provides an important section on selection and keeping current in the field. We have continued to treat reference transactions as an organic process that involves understanding both the text and subtext of a question, identifying the best resources, and providing an optimal answer. Reference and Information Services: An Introduction differed from traditional reference
texts in consciously linking questions to sources, rather than classifying resources and providing a general description of their use. Our approach, firmly grounded in real-world practices, was a direct result of the oft-heard remark from library school graduates who believed their experiences in real transactions felt remote from what they had studied at school. The progression of question → reference interview → search process → resource options → answer was deemed to be a truer representation of what students would face in the real world, and this third edition continues to uphold that structure.

Organization

While this third edition of Reference and Information Services: An Introduction is aimed at all reference librarians striving to acquire or affirm the necessary skill sets, it is organized to complement the syllabus of a typical library and information studies course. The four sections that make up the text provide a well-rounded grounding in the fundamental concepts of reference, the arsenal of major resources with which every reference librarian must become familiar to answer basic questions, special topics such as readers’ advisory and user instruction (that fall within the purview of reference work), and tools to field the ongoing responsibility of developing and skillfully managing reference departments in the face of constant change and innovation.

Part I: Fundamental Concepts

Chapter 1, “Introduction to Reference and Information Services,” provides readers with an overview of the breadth of services housed under the reference rubric and discusses some of the changes in reference service.

Chapter 2, “Determining the Question: In-Person, Telephone, and Virtual Reference Interviews,” outlines the first and perhaps most critical step in the reference process. In order to assist the reader the librarian must skillfully determine the user’s question or need. Given that reference is, and always will be, predicated on contact and communication, even in times of change, this chapter takes into account in-person, telephone, and virtual reference interviews.

Chapter 3, “Finding the Answer: Basic Search Techniques,” is in many ways a conclusion to Part I and a prelude to Part II. Having identified the question, the next step is to construct an answer. This hands-on chapter trains you to organize your thoughts, develop a strategy for the particular request, and find the optimal solution.

Part II: Introduction to Major Reference Sources

The nine chapters in this section focus on how, what, where, who, and when questions as they correlate to authoritative resources, rather than describe types of resources. Included in this section are:

Chapter 5, “Answering Questions about Anything and Everything—Encyclopedias”
Chapter 6, “Answering Questions that Require Handy Facts—Ready Reference Sources”
Chapter 7, “Answering Questions about Words—Dictionaries, Concordances, and Manuals”
Chapter 8, “Answering Questions about Events and Issues, Past and Present—Databases (and Indexes)”
Chapter 9, “Answering Questions about Health, Law, and Business—Special Guidelines and Sources”
Chapter 10, “Answering Questions about Geography, Countries, and Travel—Atlases, Gazetteers, Maps, Geographic Information Systems, and Travel Guides”
Chapter 11, “Answering Questions about the Lives of People—Biographical Information Sources”
Chapter 12, “Answering Questions about Government and Related Issues—Government Information Sources”

Each of these chapters begins with an overview of materials and how they are used to answer the particular type of question. We provide sample questions (and answers) for which those sources are best used and describe the major print, electronic, and web-based materials available. There is also guidance for collection development and maintenance practices; further considerations and special information particular to the topic; a final list of the “top ten” reference sources in the subject area; and a list of recommended free websites. The “recommended resources discussed in this Chapter” are standardized as title entries for easy discovery. As each chapter is uniformly structured, you will find it conducive both to advanced reading in preparation for service and as an effective reference source at the desk.

Part III: Special Topics in Reference and Information Work

Chapter 13, “When and How to Use the Internet as a Reference Tool,” addresses one of the most challenging and ubiquitous reference resources to have emerged in our times. Outlining the strengths and weaknesses of the internet as a reference source, this chapter also contains a five-step approach to using the internet in reference transactions.

Chapter 14, “Readers’ Advisory Work,” discusses both the history of readers’ advisory (ra) and its current practice. While ra is sometimes housed in departments other than reference (adult, Children’s, or young adult services), the librarian sitting at the reference desk should and often must be prepared to field all questions, including an ra question. This chapter, authored by Cindy Orr, describes the most common types of ra queries, best practices and common mistakes in ra, and a list of recommended resources.

Chapter 15, “Reference Sources and Services for Children and Young Adults,” authored by Meghan Harper, discusses a developmentally appropriate approach to reference work with children and young adults. Librarians must be

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conscious of both reading and development levels of children and young adults. The chapter also discusses reference service for children with special needs and includes recommended titles for reference collections for children and young adults. Harper’s excellent chapter in its entirety is available as a Web Extra (http://www.neal-schuman.com/reference-information-services-3E/).

Chapter 16, “information literacy in the reference department,” discusses the importance of information literacy in all types of libraries and offers suggestions for one-to-one classroom instruction and distance learning. In the right transaction, instruction can be a very appropriate and valued response to a query.

Part IV: Developing and Managing Reference Collections and Services

The selection of fast-disappearing or format-changing reference material has never required as much dexterity and flexibility as in the current climate. Management skills are essential for the library professional, as is the development of assessment tools that continually measure the library’s success in cresting and controlling the ebb and flow of changing reference collections and services.

Chapter 17, “selecting and Evaluating reference Materials,” provides sources for review and evaluation criteria. You will also find guidance for managing the materials budget, assessing collections, weeding titles, writing policy, and marketing the collection.

Chapter 18, “Ethics in reference,” authored by Angela Ecklund, tackles the sometimes difficult but very important issues of professional codes of ethics, plagiarism, copyright and intellectual property, as well as access to information and censorship. This is a new chapter for this edition that we hope will provide guidance to the reader.

Chapter 19, “Managing reference departments,” looks at staff, service, and department organization. This chapter provides options for managers and considerations for decision making. While aimed at the manager, it is also a helpful glimpse for any professional into the form and function of today’s reference departments.

Chapter 20, “assessing and improving reference services,” moves from the day-to-day practice of reference work to the vision and development of future services. In times of budget stringency especially, there is heightened emphasis on assessment and accountability. From why we should assess to what and how to assess to what we should do with our findings, this chapter encourages a hands-on and proactive approach to improvement.

Chapter 21, “reference 2.0,” provides a comprehensive snapshot of the many tools and sites mined from Web 2.0 technology and used to enhance reference services by innovative libraries across the United States, Great Britain, and Canada.

Finally, Chapter 22, “the Future of information service,” looks ahead to the models, materials, and services that will continue to evolve and define reference services in the foreseeable future.
Round 3

in asking the user to absorb the skill sets provided in this book as a means to navigate fearlessly through the shifting sands of reference, we have been rather fearless ourselves. We have invited stringent critiques from theoreticians and practitioners, students and faculty, as well as colleagues and friends on the ideas, organization, choices, and usability of the text. Our personal egos have been temporarily suspended in the search for an objectively good product. The four members of the advisory Board (listed on the verso of the title page) have been invaluable in helping us toward this goal. We have been in safe hands and we hope to pass that security on to you.

David Lanke, a Mover and Shaker at Syracuse University, talks of libraries as facilitators of knowledge-creation and reference as conversation and participatory networking. Round 1 of this book was birthed through intense conversation. We could see our fetal ideas gain bone, muscle, and tissue as we held focus groups at a la conferences, deconstructed scores of reference syllabi, poured through publishers’ catalogs and websites, and immersed ourselves in “participatory networking” with both aspiring students and grizzled practitioners. It was a heady experience. Round 2 was a process of fine-tuning, of quieter contemplation, of more in-depth questioning and expanded experience. Comprehensiveness, currency, and readability were the ternion values undergirding all additions, subtractions, and edits to the text. Round 3 has focused on tethering multiformat reference tools and services to the larger movements in society to provide context to the choices we have made. Crowdsourcing, cloud computing, and the remarkable immediacy of mobile technology are all feeding and being fed by a whole new style of information seeking and reference research. The product you hold amalgamates the energetic fire of its birth; the controlling waters of intensive calibration and expansion that marked Round 2; and the recognition of reference as part of a dynamically changed information universe in this Round 3 of the book.

We hope this combination will find its resonance in your individual development as intrepid and entrepreneurial reference librarians of the twenty-first century.
Virtual reference and electronic resources dominate the current conversation on reference and information services. Although the mission and goals of reference and information services remain much the same, the way they are being provided is constantly changing. The development of subscription and free electronic resources has changed the sources of information available, while virtual reference has made it possible to reach users no matter where they are. Librarians and library users are constantly bombarded with a wide range of information choices that must be evaluated for authenticity and accuracy. Whether at home on their computers or wandering through the stacks, many people feel as though they are drowning in a sea of information. New media and technologies link us to this new and growing body of knowledge and enable librarians to assist users virtually as well as face-to-face. Reference services are at once a life raft, map, and compass to those who feel adrift. In providing users with a combination of personalized services in a timely manner, libraries reaffirm their centrality as twenty-first-century public institutions par excellence.

For all its contemporary relevance, the concept of reference service is over a century old. In 1876, according to Genz (1998), Samuel Green, librarian of the Worcester Free Public Library in Massachusetts, developed the idea of having librarians assist the user in the selection of books to suit their needs. This served a dual function, increasing the use of his library’s collection and thereby demonstrating the need for the library. Green saw the role of the public library as one of welcoming users by having a pleasant and cultivated female staff. Some forty years later, in 1915 at the thirty-seventh meeting of the American Library Association, a paper on reference work was delivered by W.W. Bishop, the superintendent of the Reading Room of the Library of Congress. Bishop defined reference work as “the service rendered by a librarian in aid of some sort of study” holding that it was “an organized effort on the part of libraries in aid of the most expeditious and fruitful use of their books” (Genz, 1998: 511).

Charles Williamson further developed the idea of reference service in his 1923 report “Training for Library Service: A Report Prepared for the Carnegie Corporation of New York,” which included a course description for reference work:

A study of the standard works of reference, general and special encyclopedias, dictionaries, annuals, indexes to periodicals, ready reference manuals
of every kind, special bibliographies, and the more important newspapers and periodicals. Works of similar scope are compared, and the limitations of each pointed out. Lists of questions made up from practical experience are given, and the method of finding the answers discussed in the class. (Genz, 1998: 513)

More recently, several authors, including William A. Katz (2001) and Richard E. Bopp and Linda C. Smith (2011), wrote reference texts in which they continued to refine the role of the reference librarian over the subsequent decades.

Perhaps the most important point to remember is that reference service seeks to fulfill the greater mission of the library by assisting individual users. Despite the many transformations that have been wrought on reference work by developments of our information society and paradigm shifts in the self-understandings of the library, much has remained the same. First and foremost, it is still a service in which the librarian interacts with a patron on a one-to-one basis, whether it is in person or virtually. This level of personal service has become even more important in the twenty-first century in light of the alienating and depersonalizing effects of many information technologies. On the other hand, the way in which librarians provide such service has changed considerably—it now extends beyond face-to-face assistance thanks to the availability of the telephone, e-mail, and the technology for chat and instant messaging (IM) reference, and even social media such as Facebook and Twitter.

**Ethics**

Ethical awareness and engagement is a crucial aspect of all library services, and the ideals that have been established for the profession generally apply fully to those working in reference services. Just as a therapist would do his patients little good if he did not keep their information confidential, reference librarians must follow certain standards of behavior if the service they provide is to be effective. The American Library Association’s current Code of Ethics, last revised in 2008, provides a useful guide. This code upholds a variety of the principles essential to the modern library.

The code encourages librarians to provide the same high level of service to all library users and to provide information that is “accurate, unbiased and courteous.” This statement is at the heart of good reference service, which strives to provide good quality information and information to all. Reference staff must understand what constitutes a good reference interaction and must strive to meet that standard with each user query (Bunge, 1999).

The code calls for upholding the principles of intellectual freedom and resisting attempts to censor library materials. Resource selection is reflected in this statement, as librarians are encouraged to provide information on a subject from many points of view. The code goes on to insist on the user’s right to privacy and confidentiality in requesting and using library resources. Reference librarians must be particularly cognizant of this professional obligation. They must respect the privacy of a user by keeping their reference interview and the resources used confidential.
Intellectual property rights, addressed in the code, are of increasing importance in libraries. Librarians must keep current with changes in intellectual property laws, especially copyright, and keep their users aware of these laws. Librarians must know when copying is covered under the “fair use” provision of the law and when copying violates the copyright law. This is more than a good in itself; it also helps protect the institution, its employees, and its users from claims of copyright infringement and intellectual dishonesty.

The relationship between personal interests and professional responsibilities is discussed in the code. The respectful treatment of coworkers and colleagues and the safeguarding of the rights of all employees are encouraged. Library employees are cautioned not to put private interests ahead of library interests. This means that employees should be circumspect in their dealings with library vendors and others outside the library so their decisions are made on professional merit and are not influenced by personal interest.

The code also cautions library employees not to put personal convictions or beliefs ahead of library interests. This is of special significance to reference librarians. Sometimes a librarian must help a user research an area that is personally against the librarian’s beliefs or philosophy. By putting professional duties first, the librarian can successfully assist the user and provide the information needed.

Other professional library organizations have their own codes of ethics. These include, among others, the American Society for Information Science (ASIS), the Society of American Archivists, the Medical Library Association, and the American Association of Law Libraries. A more in-depth discussion of ethics is presented in Chapter 18.

**Kinds of Information Service**

*Information service* is the process of resolving information needs of users in response to a particular question, interest, assignment, or problem and building positive relationships with users (Radford, 1999). The Reference and User Services Association (RUSA) of the American Library Association defines reference transactions, sometimes referred to as reference service, as “information consultations in which library staff recommend, interpret, evaluate, and/or use information resources to help others to meet particular information needs” (RUSA, 2008). These reference transactions can take place in person, on the telephone, or virtually via e-mail, chat reference, instant messaging, texting, Twitter, or video conferencing. Librarians are also creating websites, answer archives, and links to “frequently asked questions”—all of which are designed to anticipate user questions and help people find information independently. Traditional reference desk service continues to be highly valued by library users in many settings, but newer forms of virtual communication such as e-mail, chat reference, and IM have grown tremendously in popularity. Consequently, it is all the more important for librarians to understand the range of inquiries that can be expected, allowing them to provide a full and ready answer, regardless of the form through which the query arises or through which the answer is delivered.
Answering Reference Questions

In light of the immense diversity and range of possible questions, being approached by a patron with an information need can seem like a daunting prospect. Indeed, much of the difficulty of information services arises from uncertainty about the kind of service or breadth of information called for by a given question. Categorizing reference questions by type is a useful way to make sense of such concerns. Three common types of reference questions are ready reference questions, research questions, and bibliographic verification.

Ready reference questions such as “Where is Harry Truman’s Presidential Library?,” “Who won the 2011 World Series?,” “What is the capital of Nepal?,” or “Where can I find a copy of the Declaration of Independence?” can be readily answered using a general reference source. The librarian may be tempted to tell the user the answer to simple ready reference questions. Yet here the saying that “giving a man a fish feeds him for a day while teaching him to fish feeds him for a lifetime” helps to explain the importance of providing instruction when possible. No matter how simple they initially seem, ready reference questions provide the opportunity for teachable moments. Taking into consideration users’ needs and willingness to engage in instruction, librarians should lead users through the process of looking up the information rather than simply provide the solution.

Librarians who assist users with ready reference inquiries on a regular basis sometimes choose to create a “ready reference” section of the most commonly used resources, either in print or on the library’s website, to answer quick questions. Typically, such sections include a general all-purpose encyclopedia, dictionaries, almanacs, and handbooks. Librarians should keep the sources up-to-date and also should avoid depending so heavily on this subset of the collection that other sources are overlooked by library users and librarians. Ready reference questions have diminished due to the ease of answering basic questions through search engines such as Google, though a study found that for chat reference about 30 percent of the questions were ready reference (Connaway and Radford, 2011). Thus, ready reference remains a cornerstone of information services, and librarians should be ready to provide it at any time.

Research questions are more complex, may take much longer to answer, and typically require multiple sources of information. These are often the questions that require the user to consider a variety of sources and viewpoints and to subsequently draw conclusions. Sometimes questions that initially seem like ready reference questions are found to be far more complex, as previously hidden facets of the user’s inquiry are revealed. Here, the variety of possible sources increases with the complexity of users’ questions. Librarians should, for example, guide users in the use of bibliographic sources, databases, and other reference resources. Likewise, users with complex questions may need guidance as to how to find or request the full text of articles for which only citations are given in a search of electronic databases, allowing them to move beyond cursory surveys of the literature.

Research questions, especially if the user is unable to fully articulate the nature of his or her query, require librarians to ask additional questions through the reference interview as a means of understanding the nature of the request.
before setting out to help the patron answer it. The librarian will need to determine how much information is needed, what level of information is needed, and what other sources have already been consulted. As is discussed in Chapter 3, information services call for mutual engagement, especially with more complex questions. Reference librarians should never be passive participants, pointing the way to an answer. Instead, they should play the part of dynamic guides, collaborating with users on their search for information and knowledge.

Naturally, the extent of such engagement may vary from one circumstance to another. Different types of libraries tend to have their own standards for how long librarians should spend with users on research questions. Many public libraries recommend that users be given five or ten minutes of personal assistance and then asked to return if more help is needed. A university library may have a similar standard, or depending on the institution, the librarian may invite the user to make an appointment for more in-depth research assistance. Some libraries may suggest that users call or e-mail ahead of their visit so the librarian can be prepared to offer the best possible assistance. Many libraries now offer consultation services for which the user makes an appointment in advance, which allow the librarian to spend more time with the user. Librarians may also refer users to other libraries with more specialized materials in the area of the users’ research or offer to call back or e-mail if additional information is found.

Finally, a library user may seek bibliographic verification when he or she has already obtained the information needed but must verify the sources. Sometimes this service is a matter of fact checking, while on other occasions users may have completed their research but lack full citation information. As users increasingly depend on electronic databases for information, compiling and formatting bibliographic citations becomes easier. Verifying and citing material found on webpages is more difficult since the information needed for the citation is not always easy to find.

Readers’ Advisory Service

Readers’ advisory service, sometimes considered a type of information service, is the quest to put the right resources in the hands of the right reader. Public and school librarians especially are increasingly expected to provide an answer to the question, “Can you help me find a good book?” Fortunately, as demand has increased, so too has the ease of providing this service. While there is no substitute for a librarian’s own knowledge or experience, many new technologies serve to make readers’ advisory far easier than it was in the past. Many online databases, for example, have functions that automatically recommend other books for those who like a given title. Others have searchable lists of works by genre, helping readers match their favorite books to others like them. As always, however, remember that readers’ advisory, like other reference work, is predicated on the interaction between a librarian and a library user. Asking directed questions, listening carefully to the user’s responses, and tailoring assistance accordingly is the basis of excellent, truly helpful service.

Readers’ advisory service is generally associated with public libraries and school libraries and may be employed by those looking for fiction or sometimes...
literary nonfiction. In academic libraries, it is far less common as users rarely come in searching for a good book to read. Even so, readers’ advisory may be needed to help lay researchers looking to deepen their knowledge of a particular field. A patron who has read and enjoyed Stephen Ambrose’s *Undaunted Courage*, but is troubled by allegations about Ambrose’s questionable accuracy and academic honesty, may want to know the titles of books about the Lewis and Clark expedition that are both reputable and engaging. Successful readers’ advisory librarians are skilled at asking users questions that enable them to assist in finding books of interest. They must know a great deal about various genres of fiction and nonfiction and be intimately familiar with their library’s collection. Significantly, it is important that they be able to convey their expertise in a friendly and conversational manner. Truly mastering readers’ advisory service requires a great deal of skill and practice. The basics are explored in more detail in Chapter 14.

**Information Literacy**

*Information literacy*, formerly often referred to as *user instruction*, may range from showing an individual how to use the library’s online catalog and basic print and electronic reference sources to formal classroom sessions about conducting research in the library. The basic component of information literacy includes demonstrating how, when, and why to use various reference sources in an integrated way that will capture the user’s attention at the teachable moment.

In today’s educational settings, the ease of using electronic resources often results in a failure to teach more traditional research strategies. While finding superficial information has grown easier, in-depth information has become increasingly difficult to find for many students. In the library, too, approaches to instruction may vary. Librarians often question whether to simply answer questions posed by users or to teach users how to employ the available resources. This may be contingent on the mission or purpose of the library. Academic institutions may call on their librarians to help students understand how to engage effectively and independently in the research and information evaluation process. Public librarians, by contrast, may try to teach users about reference sources in a more informal manner as they lead users to the answers they seek. Thus, while instruction is always an important part of reference work, the degree to which librarians go about providing it is highly contingent on the type of library and the way it has defined its role in library instruction.

In any case, all reference librarians must be skilled at helping users find information and answers quickly and be ready to teach users how to use the reference sources that are available. The best reference librarians develop an intuition for when to be information providers and when to be information literacy instructors. In some libraries, only specific, designated librarians are charged with conducting library instruction courses. Nevertheless, an increasing number of librarians are required to participate in their libraries’ information literacy program, and library school graduates are expected to be capable of teaching basic classes on the use of library resources. As should be clear, even those librarians not charged with providing formal instruction have the opportunity to teach informally those
they assist. The various aspects of information literacy are covered in greater depth in Chapter 16.

Selecting and Evaluating Print and Electronic Resources

Selecting and evaluating print and electronic information for the library’s collection can be as professionally rewarding as providing expert information service. Reference librarians’ involvement in selecting and evaluating titles for the collection helps them develop rich knowledge of the sources at their disposal, increasing their effectiveness.

The responsibility for selecting reference materials depends largely on the size and scope of the library. In large academic libraries, selecting reference materials may be assigned to subject bibliographers whose work may be limited to collection development responsibilities. On the other side of the continuum, the evaluation and purchase of resources in very small libraries may be the work of a single reference librarian or coordinator of reference. A range of shared selection and evaluation possibilities between these points include reference materials selection committees or group assignments.

The question “What makes a resource a reference source?” has long been debated in our profession. For the purpose of this discussion, reference sources are those resources set aside to be consulted for specific information rather than to be read as a whole. In other words, reference sources contain content meant to be “looked up.” Typically, one turns to a reference source in search of something in particular rather than to the text as a whole. Reference collections are always on hand either in the library or electronically, making for a consistently available body of knowledge. Note that labeling narrative or nonreference resources as “reference” to ensure that a popular volume is always available may lead to bloated reference collections, and, thus, this is not generally recommended. Finally, with the addition of electronic reference sources that have become increasingly available to remote library users from their homes, dorm rooms, offices, and elsewhere, reference collections encompass much more than print books and are available twenty-four hours a day.

As the present trend toward shrinking budgets for reference collections, lean reference collections, and the elimination of duplication among print and electronic collections continues, the careful evaluation and selection of reference materials is essential. Libraries should determine the criteria that will be used in selecting sources for their reference collections. The following criteria may help determine whether a print or electronic resource is a worthy addition to a library’s collection: scope, quality of content, appropriateness for audience, format, arrangement, authority, currency, accuracy, ease of use, unique coverage, and cost.

Some libraries select reference materials by reading reviews in the library professional literature, such as Library Journal, Choice, and Booklist’s “Reference Books Bulletin.” Other institutions insist on physically reviewing reference sources at exhibits at library association conferences or through special arrangements with publishers of reference materials. Most libraries employ a combination of these two. A more extensive discussion of selection and evaluation takes place in Chapter 17.
Creating Finding Tools and Websites

Another strategy employed by many reference departments is the creation of finding tools, subject or research guides, and pathfinders for library users. Here, librarians act as guides, mapping out the best routes through familiar territory and pointing out interesting sites along the way. Subject or research guides are often prepared by academic libraries using LibGuides (http://www.springshare.com/libguides/) as a template for frequently requested subjects, such as African studies, criminal justice, and intellectual property. Similarly, public libraries may prepare guides that address frequently asked questions of a quotidian nature, such as finding job information, checking the credentials of a health care provider, or researching a family tree. Depending on the topic, audience, and needs, these guides may assist the user to identify a selection of appropriate reference books, relevant databases and search terms, a selection of current and authoritative websites, and tips for searching the library’s catalog for additional materials.

Librarians also create websites of carefully evaluated links and other resources organized by topic. Who better than a librarian to organize information, pointing users to “the best” sources and helping them steer clear of the dubious? Web-based finding tools are available to users 24/7, they can be updated as often as needed, and they can include direct links to websites and electronic reference tools. Depending on the circumstance and the nature of a library’s web presence, such resource guides can be either general, providing direction to broadly targeted reference resources, or subject specific. General all-purpose lists of librarian-selected web resources include the Internet Public Library (http://www.ipl2.org/) and INFOMINE (http://infomine.ucr.edu/). Examples of library subject-specific guides include the New York Public Library’s Best of the Web (http://www.nypl.org/collections/nypl-recommendations/best-of-web) and the University of Washington’s Information Gateway (http://www.lib.washington.edu/subject/). Larger libraries, whether academic or public, often produce these guides. Smaller libraries may be better served by developing bibliographies for specific areas in which they have subject specialists and linking to a general reference website like the Internet Public Library.

Promotion and Marketing

Promotion and marketing of libraries and reference service is becoming more important than ever. With expanding e-resource collections and e-services, library collections may be less visible to the public, so it is even more important for libraries to call attention to them in order to encourage use by their community. Promoting reference service among individual library users can go a long way toward achieving this goal, especially insofar as it demonstrates how the library can serve them. In large communities—urban public libraries, for example—promoting the library through individual users is not enough to attract new users, and major marketing or publicity campaigns become important. In academic, school, and special libraries, promotion and marketing are equally essential. Use of print and online newsletters, websites, information literacy instruction, and meetings with faculty and staff can provide opportunities to promote the library’s resources.
Evaluating Staff and Services

Libraries may seek to routinely evaluate their reference collections or reference service. In her book *Evaluating Reference Services: A Practical Guide*, Jo Bell Whitlatch (2000: 1) wisely emphasizes the importance of defining the purpose of the evaluation before setting a strategy: “The most important questions you must ask” according to Whitlatch, are “Why am I evaluating reference services” and “What do I plan to do with the study results?”

Assessing the quality of the reference interaction, from either the user’s or the librarian’s perspective, will help determine how effective the reference service is. Evaluating reference staff is one way to do this and will also help to ensure quality reference service. The American Library Association’s Reference and User Services Association (2004) has developed “Guidelines for Behavioral Performance of Reference and Information Service Professionals” that are intended to be used in the training, development, or evaluation of library professionals and staff. The performance of reference librarians is typically evaluated on both the information conveyed to the user and the satisfaction of the interaction for the library user.

The following factors are covered by the ALA guidelines:

- **Approachability**: Are users able to identify that a reference librarian is available to help?
- **Interest**: Does the librarian demonstrate a high degree of interest in the reference transaction?
- **Listening/inquiring**: Does the librarian identify the user’s information need in a manner that puts the user at ease? Are good communication skills used throughout the transaction?
- **Searching**: Is the librarian skilled at creating search strategies that yield accurate and relevant results?
- **Follow-up**: Does the librarian determine if the user is satisfied with the results of the search/interaction? (RUSA, 2004)

These performance guidelines may form the backbone of a library’s staff evaluation instrument, whether the instrument is a simple self-evaluation checklist, a peer-evaluation tool, or a formal evaluation system influencing earning potential.

In addition to evaluating staff, the library may measure its productivity or efficiency with quantitative measures that include the number of questions answered and the frequency with which print and/or electronic sources are consulted. Smaller libraries may count the number and type of all in-person questions answered by the reference staff. Larger libraries frequently rely on quarterly one-week periods to estimate the number of questions answered over the course of a year. Depending on the available resources, data may be recorded using hand-held computers, by making hash marks on a form, or by any means in between.

A variety of other evaluation strategies are also available to libraries. For example, another useful measurement is assessing the quality of the resources available. Departmental evaluations can include issues of resource allocation.

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such as how the library’s budget allocates for library staff, print and electronic resources, computers and networks, and buildings. Evaluation methods frequently used to gauge users’ satisfaction with reference services and sources include questionnaires, surveys, focus groups, observation, and interviews.

It is crucial that library administrators determine what is to be measured and against what standards before choosing the preferred method of evaluation. There are many sources available for detailed information on designing evaluation instruments for libraries. Librarians should carefully consider these aspects: selecting the best method; developing and field-testing the instrument; administering the survey, questionnaire, or interview; planning the observation; avoiding interviewer bias; and scores of ethical issues. Analyzing data and developing conclusions and recommendations may require advanced training, and in some cases libraries may need to hire evaluation experts. These and other questions are considered in greater depth in Chapter 20.

The Changing Nature of Reference

As the form of the library has evolved in the years since Samuel Green’s seminal pronouncements in 1876, so, too, has the nature of reference services. Today, it stretches far beyond the walls of the library and has far loftier ends than welcoming users to the library with a “cultivated female staff.” Academic libraries and some special libraries in particular have already seen a slowing of traffic to the physical library and increasing use of the library’s online resources. Users can ask questions 24/7 through virtual reference and expect an immediate response. Likewise, they can access electronic resources that the library provides through its website. Virtual reference is growing quickly; the appeal of chat, instant messaging, and Twitter and other technology-based services, such as mobile technology, point to a generational paradigm shift ahead. These online reference services have the advantage of being convenient and necessary in our fast-paced world.

In numerous forms and fashions, technology continues to change reference services. Librarians must be ready to learn new technology and adapt to the needs of users unable to imagine a world without technology. Like few other professionals, librarians must be willing to ride the waves of such change, adapting to meet the needs of their users. Whether it is a smartphone, an iPad, or a laptop, users will want to receive and read their information via the technology of their choice.

New models of reference are also developing to meet different user needs. Libraries are adding more points of service, such as an information desk near the front of the library, a reference service point combined with other library services, or an in-depth reference center where a user can sit down with a librarian and work out a plan for researching a paper. In other situations, librarians rove the library to help users who do not approach the reference desk and librarians meet individually with users to discuss their reference or research needs.

These and other new strategies are changing the way information services are offered. As we look ahead, we must be aware that reference work will no doubt be based increasingly on electronic means of communication. At the same
time, it will continue to be a personal service, although not necessarily face-to-face. There will be more emphasis on electronic materials, while some older materials will still need to be consulted in print format. Even so, the way we find information and convey it is as fundamental today as it ever was. In the chapters ahead, we explore the cutting edge of contemporary reference, demonstrating how to keep this crucial service central to the modern library.

**Recommendations for Further Reading**


Connaway, L. S., T. J. Dickey, and M. L. Radford. 2011. “If It Is Too Inconvenient I’m Not Going After It: Convenience as a Critical Factor in Information-Seeking Behaviors.” *Library and Information Science Research* 33, no. 3: 179–190. Presents the findings of two multiyear empirical studies on how perceived convenience affects information-seeking behavior. The findings are put in the context of gratification theory. Convenience is shown to affect users’ choice of resources, satisfaction with the resources, and the time horizon of the search process.


Kilzer, R. 2011. “Reference as Service, Reference as Place: A View of Reference in the Academic Library.” *The Reference Librarian* 52, no. 4: 291–299. Examines how reference and research models are trending toward a distributed variety of services at point of need. Explores the traditional concept of “reference as place” and reinterprets this concept in light of reference services as they exist today. Shows that proactive methods and collaboration between universities and campus entities are increasing in importance.


O’Connor, L., and K. Lundstrom. 2011. “The Impact of Social Marketing Strategies on the Information Seeking Behaviors of College.” Reference and User Services Quarterly 50, no. 4: 351–365. Applies social marketing, “the application of commercial marketing techniques to the resolution of social and health problems,” to academic library outreach. Shows how social marketing strategy results in some positive changes in information-seeking behavior among college students, specifically a reduction in procrastination and an increase in help seeking. However, does not show an effect on the selection of materials.

Rix, W. 2009. “Reference Collections and Staff: Retaining Relevance.” The Reference Librarian 50, no. 3: 302–305. Addresses how reference collections have changed and how staff have adapted over the last twenty years. Also discusses how to weed print resources and options for making new use of the space.


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