Reference and Information Services

AN INTRODUCTION

FOURTH EDITION

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PREFACE

Reference and Information Services: An Introduction, Fourth Edition, is about skills, changing resources, and best practices. Reference service has become much more complex as available resources expand and is in a constant state of flux.

The process of maturing into an experienced reference librarian, learning new skill sets, 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. The third edition was dedicated to the entrepreneurial librarian who must continually think outside of the box and look for trends, new resources, and technology that can be adapted to the library setting. This fourth edition is dedicated to the digital explorer, the librarian who makes use of all the digital resources to assist library users in their quest for information.

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. Digitized books and other resources are available from many sources, including Google and HathiTrust. The solid old desk, across which the static transaction of reference questions and answers was conducted, is often entirely replaced by virtual reference, reference consultation services, 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 increasingly fast pace of change has compelled us to write yet another new edition to update and replace the sources listed in the third 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. An 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 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 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. An expanded 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. A new chapter on programming as reference explores alternate ways of providing information to library users in timely acknowledgment of new forms of information-seeking behavior.

While earlier editions provided a mix of print and e-resources, this fourth edition emphasizes 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 RUSA "Outstanding Reference Sources," so that a list of selected titles appears as an appendix. What worked effectively for the first three 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.

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 the 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 fourth edition continues to uphold that structure.

ORGANIZATION

While this fourth 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 you 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 these chapters:

Chapter 4, "Answering Questions about Books, Magazines, Newspapers, Libraries and Publishing, and Bibliographic Networks—Bibliographic Resources"

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. Also included are guidance for collection development and maintenance practices; further considerations and special information particular to the topic; a final list of the "top" reference sources in the subject area; and a list of recommended free websites. The Recommended Resources Discussed in This Chapter lists 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 Services," 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 Services for Children and Young Adults," authored by Sujin Huggins, discusses a developmentally appropriate approach to reference work with children and young adults. Librarians must be 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.

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 materials 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, "Ethics in Reference," authored by Diana Floegel, 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.

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Chapter 18, "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 collections.

Chapter 19, "Reference as Programming," introduces the idea of using collaboration, interactivity, and crowdsourcing programming events as a timely way to connect users with information.

Chapter 20, "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 21, "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 22, "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 23, "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 4

Skills and best practices are anchors in a reference world that is in constant flux. In asking you 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 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 Lankes 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 ALA 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 focused on tethering multiformat reference tools and services to the larger movements in society to provide context to the choices we made. Round 4 has been updated and expanded within a reference ecosystem where crowdsourcing, cloud computing, and the remarkable immediacy of mobile technology are all feeding and being fed by a vigorous 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; the recognition of reference as part of a dynamically changed information universe in Round 3; and the acceptance of continual flux and new forms of information-seeking behavior in Round 4. We hope the evolution of our approach to best practices and resource anchors will find resonance in your individual development as digital explorers of the twenty-first century.

PART I

Fundamental Concepts

Introduction to Reference and Information Services

A CHANGING REFERENCE landscape dominates the current conversation on reference and information services. Although such services' mission and goals remain steady, the way they are 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 users to this new and growing body of global knowledge and enable librarians to assist them 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, Samuel Green, librarian of the Worcester Free Public Library in Massachusetts, developed the idea of having librarians assist users 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 (Genz, 1998). Some forty years later, in 1915, at the thirty-seventh meeting of the American Library Association, a paper on reference work was delivered by William Warner 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," claiming 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 Linda C. Smith and Melissa A. Wong (2016), 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 the patron on a one-to-one basis, whether 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. Even social media sites such as Facebook and Twitter are now involved.

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 therapists would do their patients little good if they did not keep their patients' 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 high-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 users by keeping their reference interviews 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 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 other outsiders so their decisions are made on professional merit and are not influenced by personal interests.

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 own 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 Association for Information Science and Technology, 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 17.

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, social media, or videoconferencing. 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 independently find information. 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 texting have become extremely popular. 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 Jimmy Carter's Presidential Library?," "Who won the 2014 World Series?," "What is the capital of Cambodia?," or "What countries use the Euro?" 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 "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 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 poised 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 materials. Likewise, users with complex questions may need guidance as to how to find or request the full text of articles for which electronic databases offer only citations, allowing them to move beyond cursory surveys of the literature.

Research questions, especially if users are unable to fully articulate the nature of their queries, require librarians to ask additional questions through the reference interview as a means of understanding the nature of the requests before setting out to help the patrons answer them. 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 patrons 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 enquirer may make an appointment in advance, which allows for longer reference sessions. Librarians may also refer users to other institutions with more specialized materials in the area of their research or offer to call back or e-mail if additional information is found.

Finally, library users may seek *bibliographic verification* when they have 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 researchers 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 right reader's hands. 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 to those who like a given title. Others have searchable lists of works by genre, helping readers match their favorite books to similar material. As always, however, it is important to 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 are 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 in academic settings to help researchers looking to deepen their knowledge of a particular field. For example, 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 libraries' collections. 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 Instruction

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 teaching 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 a 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 using specialized resources 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 library's mission

or purpose. 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 they must 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 programs, 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 information professionals not charged with providing formal instruction have the opportunity to informally teach 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 job descriptions stipulate 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 the library 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 examines a particular section of a reference source rather than its entire text. Reference collections are always on hand either in the library or electronically, making for a consistently available body of knowledge that comes from many parts of the world. 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 fewer print books and are available twenty-four hours a day.

As the present trends toward shrinking budgets for reference collections, lean reference collections, and the elimination of duplication among print and electronic collections

continue, 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 an 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*. Other institutions insist on physically reviewing reference sources displayed at library association conferences or through special arrangements with publishers for trials of the electronic versions. Most libraries employ a combination of these two. A more extensive discussion of selection and evaluation takes place in chapter 18.

CREATING DIGITAL FINDING TOOLS

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 (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/or 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. Examples of library subject-specific guides include the Chicago Public Library's "Explore: Chicago's History" (www.chipublib.org/#/filter/explore/explore-chicago-history) and the Rutgers University Libraries' "New Jerseyana" (https://libguides.rutgers.edu/sb/newjersey). 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.

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 communities. 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 *Assessing Service Quality*, Peter Hernon, Ellen Altman, and Robert E. Dugan (2015) emphasize that "it is becoming increasingly important to have measures that reflect some aspects of quality—that is, service quality—and indicate how customers respond to services and functions" (51). The focus of measurement from the customer or external perspective can involve questions such as "How responsive?," "How accurate?," "How reliable?," "How courteous?," and "How satisfied?"

Assessing the quality of the reference interaction from the user's perspective will help determine the service's effectiveness. Evaluating reference staff is another way to do this that will also help to ensure quality reference service. The American Library Association's Reference and User Services Association (RUSA, 2013) has developed "Guidelines for Behavioral Performance of Reference and Information Service Providers" that are intended to be used in the training, development, or evaluation of library professionals and staff. The reference librarian's performance is typically evaluated on both the information conveyed to the user and the library user's satisfaction with the interaction.

The following factors are covered by the RUSA guidelines:

- *Approachability:* The reference librarian must be visible to the user either physically or virtually.
- *Interest:* The librarian should demonstrate a high degree of interest in the reference transaction.
- *Listening/inquiring:* The librarian should demonstrate good listening and questioning skills.
- *Searching:* Searching is at the intersection of an accurate search process and good interpersonal skills.
- *Follow-up:* The librarian must determine if the user is satisfied with the results of the search/interaction. (RUSA, 2013)

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 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 21.

THE CHANGING NATURE OF REFERENCE

As the form of the library has evolved in the years since Samuel Green's pronouncements in 1876, so, too, has the nature of reference services. Today, reference stretches far beyond the walls of the library and has loftier goals 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 an 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, social media, 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 this 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 electronic resources. 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, may meet individually with users to discuss their reference or research needs, or work as an embedded librarian in an online course.

These and other new strategies are changing the way libraries offer information services. Looking ahead, librarians 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 librarians and users find and convey information is as fundamental today as it ever was. The chapters ahead explore the cutting edge of contemporary reference, demonstrating how to keep this crucial service central to the modern library.

RECOMMENDATIONS FOR FURTHER READING

Agosto, Denise E., Lily Rozakis, Craig MacDonald, and Eileen G. Abels. 2011. "A Model of the Reference and Information Service Process: An Educators' Perspective." *Reference and User Services Quarterly* 50, no. 3: 235–244.

> This article provides an overview of current trends in the delivery of information services, models of practice, and the role of the librarian in education. Reference today is found to be a more collaborative, evaluative process than in the past.

Alexander, Laurie, Jane Blumenthal, Karen Downing, Barbara MacAdam, K. Rana Gurpreet, Karen Reiman-Sendi, Nicole Scholtz, and Laurie A. Sutch. 2011. "Mlibrary: Concepts for Redefining Reference." *Journal of Library Administration* 51, no. 4 (April 22): 326–342.

> The authors examine the evolution of library reference services over the course of ten years at the University of Michigan Library. This study of one library provides general insights into how reference has changed during this period, including the reconfiguration of space in the reference room, reference inquiry trends, shifts in the role of academic librarians, as well as the emergence of new information needs and new technology.

Buss, Stephen P. 2016. "Do We Still Need Reference Services in the Age of Google and Wikipedia?" *The Reference Librarian* 57, no. 4: 265–271.

> Buss argues that even as reference services and the role of the information professional change, the user's need for assistance will still be there.

Connaway, Lynn S., Timothy J. Dickey, and Marie 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.

> This article 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, their satisfaction with the resources, and the time horizon of the search process.

Ismail, Lizah. 2010. "What Net Generation Students Really Want: Determining Library Help-Seeking Preferences of Undergraduates." *Reference Services Review* 38, no. 1: 10–27.

> Ismail discusses the results of a survey of undergraduates at Marywood University, which, to the surprise of the university's librarians, indicated that students preferred in-person reference encounters to virtual reference. Findings underscore the benefit of assessing the needs and preferences of users before investing too exclusively in new models of service.

Kilzer, Rebekah. 2011. "Reference as Service, Reference as Place: A View of Reference in the Academic Library." *The Reference Librarian* 52, no. 4: 291–299.

> Kilzer examines how reference and research models are trending toward a distributed variety of services at point of need. She explores the traditional concept of "reference as place" and reinterprets this concept in light of reference services as they exist today. Kilzer shows that proactive methods and collaboration between universities and campus entities are increasing in importance.

Nunn, Brent, and Elizabeth Ruane. 2011. "Marketing Gets Personal: Promoting Reference Staff to Reach Users." *Journal of Library Administration* 51, no. 3 (March 24): 291–300.

> Nunn and Ruane suggest an outreach campaign to address the lack of awareness of reference services by promoting the personal aspect of reference through person-to-person interactions, word-of-mouth recommendations, and establishing relationships with faculty and students.

O'Connor, Lisa, and Kacy Lundstrom. 2011. "The Impact of Social Marketing Strategies on the Information Seeking Behaviors of College Students." *Reference and User Services Quarterly* 50, no. 4: 351–365.

> The authors apply social marketing, "the application of commercial marketing techniques to the resolution of social and health problems," to academic library outreach. Their work 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, it does not show an effect on the selection of materials.

Smith, Debbi A., and Victor T. Oliva. 2010. "Becoming a Renaissance Reference Librarian in Academe: Attitudes toward Generalist and Subject Specific Reference and Related Profession Development." *Reference Services Review* 38, no. 1: 125–151.

> Smith and Oliva discuss librarians' attitudes about general and specialized reference questions and the level of subject-area preparation needed by academic librarians at the reference desk. They also address professional development and confidence level.

Stoddart, Rick, and Beth R. Hendrix. 2016. "Learning at the Reference Desk: A Pilot Project to Align Reference Transactions with University Learning Outcomes." *Journal of Academic Librarianship* 43, no. 1: 3–7.

> This article reports on a project designed to measure the educational impact of reference services on students.

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Genz, Marcella D. 1998. "Working the Reference Desk." *Library Trends* 46, no. 3 (Winter): 505–525.

Hernon, Peter, Ellen Altman, and Robert E. Dugan. 2015. *Assessing Service Quality: Satisfying the Expectations of Library Customers.* 3rd ed. Chicago: American Library Association.

Katz, William A. 2001. *Introduction to Reference Work.* 2 vols. New York: McGraw-Hill.

Radford, Marie L. 1999. *The Reference Encounter: Interpersonal Communication in the Academic Library*. Chicago: Association of College and Research Libraries.

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Smith, Linda C., and Melissa A. Wong, eds. 2016. *Reference and Information Services: An Introduction.* 5th ed. Englewood, CO: Libraries Unlimited.

SUBJECT INDEX

alastore.ala.org