
Automating The Reference Department: A Goal Oriented Approach

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Two years ago during the annual departmental goals session, the Reference Department at Perkins Library outlined a series of goals and objectives designed to encourage the integration of electronic reference tools and services into the traditional delivery of reference services. Each member of the department made a commitment to increase his or her online searching skills and to experiment in an open minded way with new CD products. This past year the two previous goals were reaffirmed and a third goal was added. It called for the development of INFOLINE, an electronic bulletin board system designed to enhance user access to reference services. Underlying our endeavor is the belief that new technology has a great deal to offer both the user and the librarian. We are attempting to concentrate on the positive aspects of new technology and how we can use it to enhance reference service.

Central to the implementation of new technology is the word *service*. We see our student patrons as having a limited time with us. It is our goal to make reference service during that time the best they can receive. When they leave the university, we want them to think back to their four years of library use in positive terms and perhaps as a standard with which to measure future service.

Electronic reference tools and services exist in several different forms at the Duke Library. Traditional appointment-based online search services exist in combination with increased online ready reference searching. We subscribe to a growing number of CD products and we have established an electronic reference query system called INFOLINE. Although the products and services differ greatly in their structure, several governing philosophies tie their implementation and use together.

Our planning for reference services is marked more by openness and the awareness of possibilities than by policy statements that attempt to deal with every imaginable problem that might

arise. We have found that even when we study situations in great detail, it is impossible to second guess the reality. Our approach has been to deal with problems if and when they arise.

CD Services

At Duke, one of our goals is to provide open access to all CD products. We observe independent user access and modify the access and user guides as necessary. Currently we have four dedicated public access stations and one that handles two separate data bases. The dedicated stations have been assigned to *SocioFile*, *PsycLit*, and two for *Infotrac*. We have a UMI station that provides shared access to *ABI Inform* and to *Newspaper Abstracts*. We keep the *ABI Inform* disc and the two *Newspaper Abstract* discs on the table with the PC. We allow patrons to change the discs, and we keep access to all the products open even after the Reference desk is closed. After two years, we have yet to experience vandalism or theft of any items. We do not have a limit on printing nor do we charge a fee for the use of the PCs.

Creativity, openness, and flexibility are essential elements in the delivery of new reference services.

We are also determined to handle the maintenance of the equipment in much the same way. We keep a supply of ribbons and ink jets at the desk as well as extra boxes of paper. During the busy times, we will ask the user (usually a student) to carry the paper boxes out to the PC and to thread the paper. Many patrons are more than willing to change the ribbons as well. At first, staff members were self-conscious and fearful of handling these duties and found the complexities of changing ribbons and inserting the paper correctly a major concern. The student patron, however, has been more than willing to lend a helping hand. (Especially if it speeds up access!) Since the library is a self-help facility in almost every other

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way including the use of copy machines, we decided to extend the existing philosophy to the new services. We make every attempt possible to minimize the necessity of adding staff as we add new services. At this time we have not yet added extra student hours or support staff. Current job descriptions, however, have undergone dramatic changes.

Our experience with CDs has demonstrated that we can imagine far more problems and extenuating circumstances than actually exist. Our practice thus far has been to set up the product in a public area as soon as it arrives and deal with problems if and when they arise. The department's overriding concern is to ensure user satisfaction and ease of access.

Instead of viewing our unfamiliarity with the data bases as a problem, we look at it as an opportunity to increase our skills and to keep ourselves as current as possible.

For the most part we depend on CD software to instruct the user. Both *IAC* and *SilverPlatter* have excellent user compatible software. Most of our users are not interested in the complexities of searching but want a straightforward functional approach. After a basic familiarity with the product, a few will endeavor to search with greater sophistication. The majority feel comfortable searching with their own terminology and in their own way.

Some products, however, are not graced with smooth user compatibility. Products such as the *OED*, *PAIS*, or even the *UMI* products still have a way to go as user independent stations. We have developed guides to these sources and find that extensive instructions, while helpful to librarians, are not so regarded by users. They tend to prefer brief, to-the-point instructions or verbal instruction tailored to their specific information needs rather than an introduction to the system in general or to its conceptual framework. There are exceptions to this, of course, and those exceptions are accommodated.

Online Ready Reference Services

Perkins Reference Department now maintains a PC at the reference desk for online ready reference searching. In the fiscal year 1988/1989, we conducted approximately three thousand

ready reference searches. These searches are done at the discretion of the librarian and when professional judgement indicates that a search will be the most efficient or, indeed, the only way to obtain the information requested. Users are not assessed fees in either of these situations.

Each reference librarian is expected to have a working knowledge of *BRS*, *Dialog*, *Knowledge Index*, *BRS After Dark*, and *RLIN*. Each reference librarian is encouraged to turn reference transactions into learning experiences as they work with patrons on unfamiliar data bases or systems. In fact, whenever we work with a patron and use a printed reference tool with which we have limited familiarity, we learn with the patron. We decided to carry this same rule over to electronic media. Instead of viewing our unfamiliarity with the data bases as a problem, we look at it as an opportunity to increase our skills and to keep ourselves as current as possible.

Infoline

In February 1989 we met to discuss the ramifications of introducing a service that would permit students, faculty, and staff who had access to a computer and a modem to send in reference questions, suggestions and other messages twenty-four hours a day. A bulletin board system was chosen as an interim mechanism while the University moves toward the installation of a local area network for the campus. We decided not to limit the service to categories of information, but to open it up to any question a user had. We would answer it as we would any reference question received in person or over the phone. Since we were uncertain how the system would be used, we decided to implement the service for a trial period to gauge use and demand. By March 6 we were ready for a trial run and had prepared an advertising blitz of the campus. Each person in the department participated in the planning and initial trial period of the service. More than eight hundred users logged on within a two and a half month period. Many offered advice and suggestions in the further development of the system.

Currently, INFOLINE provides a means for registering suggestions concerning the Perkins Library System; for learning the schedules of libraries in the system; for requesting material on interlibrary loan; and for answering reference questions online. Questions received before 8 a.m. each day (except Sunday) have a response by 1 p.m.; those received before 1 p.m. on any day have a response by 4 p.m.; and those received by 4 p.m. have a response by 8 p.m. of that day. Our

goal for this coming year is to begin downloading bibliographic files directly to the user via INFO-LINE. What we have found most gratifying during the development of the service is that as a department we have worked toward a goal with dispatch, confident that we can handle the ramifications of the system's success or failure.

We have learned that compromise can indeed produce quality reference services and that, without it, momentum toward improved library services can be slowed or even stopped.

Conclusion

Our profession is not a static one. It offers opportunities for continued growth at every level. In reference we have the opportunity to use analytic skills on an hourly basis. New ideas and new concepts abound in the delivery of reference services and not all of them require enormous budgets. Creativity, openness, and flexibility are essential elements in the delivery of new reference services. They are essential elements in the provision of traditional reference services as well.

Sometimes fear of the unknown, fear of making mistakes, or the fear of losing face often impede the provision of imaginative and aggressive reference service. We have learned that in many cases it is our own recalcitrance that limits reference service, not necessarily an imperfect product, difficult data base or an uninformed public.

We have grown a great deal as a department in our attempt to integrate automated reference tools into daily reference activities. We have learned to have more respect for user satisfaction and to trust a patron's ability to make informed decisions about his or her own information needs. We have learned that users want answers with as few impediments to the direct information source as possible. We have learned too, that there is no one way to accommodate user preferences.

We know that differences exist between librarians and users when defining or even identifying problems of access. We have learned that compromise can indeed produce quality reference services and that, without it, momentum toward improved library services can be slowed or even stopped. We have learned not to commit

to assumptions about the unknown and to greet the unknown confident that as professionals we have the experience and the ability to welcome problems as challenges rather than obstacles or headaches.

Our endeavors over the past several years have made us realize that we should question the wisdom of evaluating new concepts, services or technology by standards developed for previous times. But perhaps the greatest benefit of our efforts to incorporate automated sources into reference services has been the necessity for rethinking established concepts regarding user information needs and to reassess not only what we are doing, but why we are doing it.

Each person in the department has grown quite dramatically in the past two years. We feel that our reference abilities and our collective efforts in providing reference service have reached new levels of quality and efficiency. Statistics show an increase of thirty-two percent in reference transactions over the course of the past three years. The ratio, however, between reference questions and miscellaneous/directional questions has not increased and represents approximately twenty-three percent of the total number of queries. We believe that future technological advances, when incorporated with thought and creativity, can offer even greater levels of quality and efficiency.

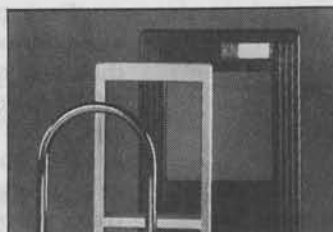


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