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Reference Service Without the Desk

Abstract

Purpose: This article describes how a college library critically examined its maintenance of a traditional reference desk for in person services and changed its service model to suit local needs.

Design/methodology/approach: We examined quantitative and qualitative reference use data prior to changing our service model, and we formally articulated the purpose of reference services. Following the change we again examined use data, conducted a convenience sample survey, and measured visits to our website.

Findings: We came to the conclusion that while maintaining in person reference was important for our library, a separate desk was not the best means of providing service at our college. Following the change to our service model, use of reference and consultation services dramatically increased.

Originality/value: Our new on-call, consultative reference service model is described, as is a description of how we managed the change process internally, how we marketed reference services to our students, and how we are assessing the results. Considerations for choosing a reference model appropriate to one's local conditions are outlined.

Keywords: Academic libraries, reference services, change, assessment, user studies

Paper type: Case study

Introduction

Although reference is considered a core library service, national trends over the past decade have shown a 35% decrease in reference transactions at academic libraries. (ALA, 2008) It has also been suggested that a librarian is not needed to handle many questions. In a local study of actual reference desk queries, Ryan concluded that 89% of questions could be answered by a non-librarian. (Ryan, 2008) Much has also been written about the changing nature of students and research sources. Foster has described the "self-service" mentality of current students who have grown up pumping their own gas and shopping online, and whose research is facilitated by the large amounts of information now available online (Foster, 2007). In examining national statistics by library type, Applegate observes variations in the degree of reference transaction declines depending on the type of academic institution, and argues for more attention to differences between libraries (Applegate, 2008). In this context, we set out to critically examine reference use at our library, and determine whether our existing librarian-staffed reference desk model was most appropriate for current, local needs.

Our Local Environment

Our library serves a highly selective, residential liberal arts college founded in 1783. The college has approximately 2400 students and 240 faculty. The library is in the center of campus convenient to the dormitories, and many students choose to hang out and study in the library. The culture of the entire institution is "high touch". We have low faculty-student ratios, classes

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3 are small, and students get to know professors and college staff by name. Almost all our
4 reference transactions from students are conducted in person even though we have offered, and
5 marketed, email and instant messaging reference services for several years. We have an active
6 liaison outreach program, and faculty typically email or go directly to their departmental liaison
7 librarian, rather than use the general reference service. Once students declare a major, they also
8 often get to know the academic department's liaison librarian and seek help directly from that
9 person. An active information literacy program has increased students' exposure to individual
10 librarians from whom they may seek help with specific course assignments.

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13 Prior to removing our reference desk, the library building contained five service desks:
14 the main and lower level circulation desks, the archives & special collections desk, the reference
15 desk, and the computer services helpdesk. Referrals are made when students or other users
16 inquire at a desk which does not handle their type of question.
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19 **The Evidence Points to a Problem**

20 In 2006, we implemented a new online form for collecting reference transaction data.
21 Data collected includes date, time, location, type of user, category of question, duration of
22 transaction, and a note field for describing the question content. Whereas before we had
23 primarily simple counts of the number of transactions, the new form gathered quantitative and
24 qualitative details about each encounter into a spreadsheet to aid analysis. Given the 64 hours
25 per week that we staffed the desk, our overall numbers were low. We averaged only about 1
26 question per hour. There were no identifiable "peak" times – use was low across all hours.
27 Analysis also indicated that 32% of the questions asked at the reference desk were not reference
28 questions, but rather directional queries, password resets, problems with photocopiers, and the
29 like. Of those questions actually categorized as "reference", over half were answered in less than
30 5 minutes, raising the issue of whether a librarian was really needed to answer them. Historical
31 local data showed that the total number of reference questions asked each year had been steadily
32 declining for the past 4 years, consistent with national trends.
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35 Anecdotally, students seemed confused about the role of librarians at the reference desk.
36 One student referred to the reference-desk librarian as the computer "attendant" (there is a cluster
37 of computers for student use nearby). Another student questioned whether or not asking the
38 student worker at the circulation desk for help was just as good as asking for help from the
39 librarian at the reference desk.
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41 Other aspects of the library's services also held implications for reference. The library
42 was in the second year of developing an extremely successful information literacy program. The
43 number of instruction sessions taught by librarians was up 55% with further growth anticipated
44 in the coming year. The librarians shouldering this increased teaching load were the same
45 librarians maintaining staffing at the reference desk. We were also asking these same librarians
46 to step up their liaison outreach to faculty, their collection development activity, and their work
47 on special projects. Given these multiple responsibilities, we needed to examine what would be
48 the best use of librarians' time.
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51 **The "Dangerous Idea"**

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53 Libraries have experimented with a wide variety of in-person reference service models.
54 These models include consultation services (Jastram and Zawistoski, 2008), field librarians
55 (Johnson and Alexander, 2008), use of students to staff the reference desk (Zamostny, 2008),
56 having a tiered reference service with two information service points (Nassar, 1997), and
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3 stationing librarians at service desks located outside the library (Kuchi *et al.*, 2004). These are
4 typically described as adjunct services, rather than substitutions for staffing a reference desk in
5 the library. Some libraries have combined the circulation and reference desks (Flanagan and
6 Horowitz, 2000).

7
8 Librarians who had worked at our library for many years remembered past attempts to try
9 variations on reference desk location, none of which had proved satisfactory. Simply relocating
10 the reference desk in an effort at improved visibility was dismissed because we believed the
11 current location was already reasonably visible given our architecture. A separate “information
12 desk” located right inside the front door had been tried years before, but in a building that
13 already had five service desks, adding another seemed ill-advised and would create staffing
14 issues. Staffing the reference desk with undergraduate students would seem to further confuse
15 patrons about the librarians’ role and expertise in providing reference, especially since our
16 circulation desks are often staffed with student workers. Combining services at the main
17 circulation desk was considered and rejected for various reasons. Access services staff were
18 concerned that too many activities (materials checkout, equipment loans, reserves service) were
19 already taking place at that desk. Librarians were concerned that their role would be unclear, and
20 they might end up spending shifts checking out books rather than providing reference services.

21
22 Eventually a “dangerous idea” was proposed (Routt *et al.*, 2008). What if we took away
23 the physical reference desk? Reference services would continue to be provided by librarians,
24 but we would change to an “on-call” model for spontaneous questions, and also promote
25 scheduled consultations marketed as “office hours by appointment” to students. Our students
26 understood that their faculty – experts in their discipline – kept office hours, so in our
27 environment we thought this model would have meaning for them as they sought research help.

31 32 **Change is Good, You Go First**

33 Any new idea is worth examining critically, and some of the librarians raised concerns
34 when this model was first proposed. By not sitting out at a reference desk, librarians might lose
35 “visibility”. This was less of an issue for us, because at this same time librarians were becoming
36 highly visible through our active liaison outreach and information literacy program. Still, it was
37 decided to address this concern by conducting a reference services marketing campaign, which is
38 further described below.

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40 There was also concern that the change would generate faculty complaints. However,
41 since our data showed that faculty almost always went directly to their departmental liaison
42 librarians for assistance, complaints about removing a service point they did not use were
43 deemed unlikely. In the end, there were no complaints from faculty.

44
45 Another concern was that referrals be made appropriately from the circulation desks,
46 which under the on-call system would be the first point of contact for most users. This concern
47 was addressed by instituting a formal reference referral training program for all circulation desk
48 staff, including student workers.

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50 Of most concern, and most difficult to address, was the removal of a powerful symbol of
51 librarianship and library service. There was confusion among some library staff that we were
52 eliminating reference services, when in fact it was only the physical desk – the furniture – that
53 was to go. Reference services would remain, and would even be enhanced, under our new on-
54 call/consultation model. The importance of maintaining tradition at our 225 year old institution
55 was raised. One librarian asked “what would we do?” if we didn’t sit at the reference desk. The
56 traditional role of reference librarian at the reference desk was clearly part of the personal
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3 identity for some librarians. To address these concerns we held a special meeting for all the
4 librarians who provide reference services. At that meeting we allowed librarians to describe
5 what they liked best about providing reference and what they liked least. We discussed what
6 was working under our current model and what was not. We also discussed how reference
7 services fit into the broader scope of our responsibilities for liaison outreach and information
8 literacy instruction. In the end it became apparent that the new model would allow us to keep the
9 best aspects of reference services, while eliminating some of the problems we experienced with
10 our current, desk-bound model.
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13 Because of the many concerns that had been expressed, we at first left the physical desk
14 in place at the start of the fall 2007 academic term. A sign directed users to ask for assistance at
15 the circulation desk. By midterm break it was clear that the new system was working and there
16 were no complaints, so we had the reference desk removed.
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18 19 **Marketing**

20 Some librarians were concerned that loss of reference service visibility might occur with
21 removal of the desk. Also, the number of non-reference questions we were getting indicated that
22 many students lacked an understanding about the purpose of reference services. So in parallel
23 with changing our service model, we formed a “reference services marketing team”. We had
24 already done some marketing with posters and on our website, but we set about to formalize a
25 marketing campaign. The team immediately set two goals: (1) that every student knows how
26 and where to get reference help; (2) that every student knows what a reference librarian can do
27 for them. Note that our goals did not include increasing the number of questions asked. We did
28 not necessarily want to increase the overall number of questions asked. If certain types of
29 questions increased, such as directional, it might actually indicate a failure of our signs, maps,
30 and website organization. We were interested in encouraging the use of reference services to
31 help with research questions for which a librarian’s expertise was required.
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34 Goal 1 is addressed by using some standard marketing techniques. These include
35 advertisements in the student newspaper and the campus e-newsletter; table tents throughout the
36 library; posters in first year dormitories; added signs at entrances, where the desk used to be, and
37 near the librarians’ office suite; a large “Ask!” sign over the circulation desk; rotating ads on our
38 digital signs; and an enhanced “Ask a Librarian” website linked prominently from the library
39 homepage.
40

41 Since reference and instruction are closely linked, we make a point of highlighting
42 reference services when we teach information literacy classes. The college course management
43 system template includes library resources and services links, including reference services. We
44 encourage faculty to refer students to librarians for help, and many professors put the liaison
45 librarian’s contact information with the message “office hours by appointment” on course syllabi
46 and assignments.
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48 In choosing our second goal, that students know what a reference librarian can do for
49 them, we created an opportunity for the librarians to articulate exactly what we expect our
50 reference service to provide. We came up with five items which reflect the ACRL information
51 literacy competencies (ACRL, 2000). As worded in our marketing materials, a librarian can help
52 users with: finding information (books, articles and more); choosing the most relevant
53 databases; improving a research strategy; critically evaluating information; and citing sources
54 properly.
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The “Ask a Librarian” website includes details about our on-call service, a Meebo widget for instant messaging the on-call librarian, and a page for each subject specialist librarian. These individual pages include each librarian’s photograph and contact information to personalize our service. Each librarian’s page also gives details of his or her areas of subject specialization and education in order to emphasize the expertise of our librarians.
(<http://lis.dickinson.edu/Library/Research/libraryliaisons.htm>)

Sustaining our reference marketing strategies has not proved difficult. Many of the techniques we are using take little effort to repeat each semester now that the marketing materials (table tents, posters, advertisements, webpages) have been created. Our improved permanent signage is already in place; we make use of existing digital signs for messages that change throughout the term. Other techniques have been absorbed into our liaison outreach activities. Many faculty now list liaison librarians on syllabi without being prompted. Much of our marketing to students takes place in the course of our information literacy activities by mentioning the availability of research consultations whenever we teach a class. Word-of-mouth among students has further promoted our service. Our original reference marketing team now meets only once or twice each term to check materials for any necessary updates and to repeat aspects of the campaign for new students.

Training for Effective Referrals

The success of our new model relies heavily on collaboration with our access services staff, as they are now a first point of contact for most users with a question. To ensure a smooth referral system, the associate directors responsible for reference/instruction and access services work closely together to provide a training program for all circulation desk staff and student workers. The training consists of a formal session on how the on-call system works; who the reference librarians are and what their areas of expertise are; the five broad areas of research help librarians provide; and how to make effective referrals. The training includes scenarios in which a straight-forward sounding question (“do you have this book”) may actually lead to a more in-depth information need (“I need help finding any scholarly books and articles on this topic”), and an emphasis is placed on routinely offering users follow-up help from a reference librarian. Since the circulation desk is open many more hours than librarians are available on-call, the training also stresses offering follow-up with a librarian the next day for ongoing research assistance. We emphasize the importance of teamwork between access services and reference/instruction services staff to provide excellent service to our users.

Required sessions are held as each new cohort of student workers is trained, typically at the start of each academic term. Any new permanent access services staff are included in the training. In addition, the associate director for reference/instruction is included in at least one meeting of student workers several weeks into the term to reinforce the referral process and to answer any questions they may have. A side benefit of these meetings has been the opportunity to use our student workers as a periodic informal focus group to find out how well reference services are working from the point of view of students.

Logistics of the New Service

In our new service model, we continue to do a weekly reference schedule with shifts assigned, but librarians work from their offices. The on-call librarian is responsible for staying near his or her office during an assigned shift, but otherwise can do other work when not actually

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3 helping a user. All the librarian offices are near one another, though remote from the circulation
4 desks. Reference questions from in-person users or that come by telephone are referred to the
5 scheduled on-call librarian from the circulation desks on the main and lower levels. The
6 librarian typically comes out to the circulation desk (a short walk) to assist; alternatively, a user
7 with an in-depth question is welcomed back to the librarian's office for a consultation. As an
8 additional indication of who is currently on-call, small red flag is placed on the door outside the
9 librarian's office. Many students go directly to the office area and look for the red flag once they
10 are familiar with our system. The on-call librarian is also responsible for answering any
11 questions that come to the central reference email account or through our IM reference service,
12 although use of these online services remains low on our residential campus.

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14 Since we increased marketing of our reference services through our information literacy
15 classes and through faculty referrals, many students now know who the liaison librarian is for
16 their course or major. This has greatly increased the number of students who directly contact the
17 subject specialist librarian for their course. Typically the student will email the librarian directly
18 and schedule a consultation appointment for a later time, although some simply drop by and ask
19 to see a specific librarian. Data is gathered on all reference encounters, whether drop-in or by
20 appointment. To balance the workload fairly, librarians who provide a larger number of
21 consultations by appointment are scheduled for fewer on-call shifts.

22 23 24 25 26 **Assessment & Outcomes**

27 After one academic year under our new model, the reference marketing team conducted a
28 three-pronged assessment. We looked at reference service use statistics, measured visits to our
29 Ask a Librarian website, and conducted a convenience sample survey of students. By all
30 measures the new model has been a success, and there have been no complaints from users.

31 We saw a dramatic increase in the use of true reference encounters with librarians,
32 including consultation appointments with subject specialists. In the first year following the
33 change in our service model, combined appointments and walk-in consultations increased 37
34 percent (from 308 to 421 encounters). When measured alone, consultations by appointment with
35 a specific librarian more than doubled (from 66 to 214). Non-reference questions (directional,
36 password resets, computer problems) answered by a librarian decreased 66 percent (from 615 to
37 211).

38 We compared visits to our old reference services information webpage with our newly
39 enhanced Ask a Librarian site by analyzing snapshot data from two months at the beginning of
40 the term from the years before and after the service model change. The comparison showed
41 approximately the same number of visits to the new page as for the two older pages combined.
42 Many of the users came directly to our Ask a Librarian page from the college portal, a site used
43 heavily by students at our college. Also, many visitors to the main Ask a Librarian page went on
44 to immediately visit an individual liaison librarian's page.

45 Our survey of students consisted of a convenience sample of students entering or leaving
46 the library's information commons area via our secondary library entrance. We gathered
47 responses from approximately 5 percent of the student body across all four years of college.
48 Results showed that 66 percent of respondents had used our reference service, over 90 percent
49 were aware of things that a librarian could do for them, and over 90 percent were aware that they
50 could get help from a librarian by asking at the circulation desk.

51 While we certainly think that our reference marketing efforts were effective, it is unlikely
52 that the marketing alone would have resulted in the successful transformation of our service. A
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3 central goal was to encourage use of the service for research help requiring a librarians'
4 expertise. The location of the old reference desk in a busy area with computers and copiers made
5 it highly unlikely that anyone sitting there would avoid getting directional and other non-
6 reference questions (e.g., "the copier needs more paper"). Prior marketing efforts alone had not
7 been sufficient to clarify the role of the librarian at the reference desk as distinct from the role of
8 staff and student workers at the circulation desk. Also, the reference desk sat in the middle of an
9 open, sometimes noisy area, and was thus hardly conducive to the kind of consultative "office
10 hours" approach to which we changed.
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13 **Staffing Issues**

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15 There have been additional benefits for staff that have resulted from the service model
16 change. There is reduced stress on librarians juggling responsibilities for reference, instruction,
17 liaison outreach, and special projects. Librarians answer fewer routine directional and
18 technology questions as these are handled or referred from the circulation desk. Since the
19 number of in-depth reference queries and consultations has actually increased under our new
20 model, librarians are not providing less reference, but the reference questions answered by
21 librarians' are much more likely to make use of their education and expertise increasing their job
22 satisfaction. Relationships and communication with access services staff have strengthened, as
23 we now have increased teamwork for answering users' questions at the most appropriate service
24 point. Access services and reference staff also work more closely to identify areas for service
25 improvements.
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29 **Conclusion: Choosing a Model that Suits Your Institution**

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31 While the model described has worked extremely well at our institution, the conditions
32 and evidence from a library's local environment should be used in any decision about the best
33 way to offer reference service. The following questions should be answered in critically
34 examining reference services:
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- 36 • What is your reference service philosophy? How do you define "reference service" at
37 your library? Should librarians primarily answer questions that require their expertise, or
38 is your philosophy that no question is "too small" and it is acceptable for librarians to
39 spend time between reference queries pointing out the bathroom and restocking the
40 photocopiers.
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- 42 • If you have a dedicated reference desk, what is the level of traffic? Is the level of staffing
43 at the desk appropriate for the number and types of questions being asked?
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- 45 • How does your reference model affect your users' perceptions of librarians, the library,
46 and your services? Do your users' understand what "reference service" means? Do they
47 know the difference between a student worker and a librarian? Do they understand the
48 differences between various service points? Do you need to do additional marketing to
49 help your users know both that your service exists, and what exactly it provides? Do not
50 assume that simply having a visible desk labeled "reference" leads to that understanding.
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3 • Critically examine the true costs of providing traditional reference services in order to
4 maximize return on investment. What is a librarian's time worth? Are you making the
5 best use of non-reference staff knowledge and skills?
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- 8 • Do the librarians who provide reference services also have other responsibilities
9 (teaching, liaison work, collection development, etc.). What other work does not get
10 done while a librarian is waiting at the reference desk for questions, or is answering basic
11 directional questions that a student worker could handle? How realistic is it that a
12 librarian is able to do other intellectually challenging work between answering reference
13 and non-reference questions while seated at a public desk? What are the priorities for
14 how librarians use their time?
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- 17 • Consider reference in the context of all your library's services – instruction, outreach, etc.
18 How do the services intertwine or complement one another?
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- 21 • Consider the physical layout of your library. Do the number and placement of the service
22 points enhance or detract from your users' experience? Are users clear about where they
23 can obtain specific services, or do they end up being "bounced" from desk to desk to get
24 to the service they need?
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- 27 • What is the effect of your reference service model on staff morale, for reference
28 librarians and for other front-line service staff?
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- 31 • Analyze and assess your service on a regular basis and be prepared to make adjustments
32 to your services as local needs change. Identify ways of tracking and analyzing reference
33 statistics, other than keeping simple tallies, in order to make more evidence-based
34 management decisions. Collect qualitative data about the kinds of questions received, in
35 addition to quantitative data. Consider alternative, proactive means of addressing
36 frequently asked questions.
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- 39 • Talk to your front-line staff in all units, including student workers. Gather feedback from
40 your users.
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- 43 • Match local characteristics with reference models in order to find the most appropriate
44 mix of services for your institution. Is your institution residential, or do you serve large
45 numbers of commuters? Do you serve distance education sites? How do your users
46 prefer to ask for help -- in-person, email, IM? How much are each of these different
47 modes of service actually used? Do your users appreciate becoming familiar with a
48 librarian versed in their field such that they will wait for an appointment with that
49 person? Or are your users always in a hurry, and best served by a rotating team of
50 reference generalists?
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54 One size does not fit all, and it may be best to combine aspects of more than one model to
55 provide the best service for your users. In the course of changing our service model, we learned
56 that the reference desk is ultimately a piece of furniture. Following removal of the desk, we
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were successful in actually improving the quality and use of our reference services. Reference service is not only possible, but can thrive without the desk.

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