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## Reference By Any Other Name

Ellie Dworak  
*Boise State University*

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Librarians have been doing long-distance reference work for a very long time. Libraries have used telephones since sometime in the late 1800s or early 1900s and email since before I began my career in 1996. Even chat reference can hardly be called an "emerging reference service"--I first remember hearing about it at a Southern California Online Users Group conference a decade ago. Though reference via machines is not new, we seem to be at a pivotal time. There are currently so many possibilities for reaching out to our patrons that it can be hard to make sense of which options to offer. This is not made easier by a difficult fiscal environment, rapidly changing technology, and a plethora of *other* services that are *also* changing rapidly. What's a librarian to do? This column is meant to make some small sense of that question, both for those of us currently offering a wide range of distance reference services and those who wish they could do more.

There are many ways to provide distance reference service, ranging from the tried and true (email) to the more adventurous (video chat, Twitter). This article will focus on several basic distance reference services that are within reach for most libraries, regardless of budget or size.

- Email (or a form that goes to email)
- Chat
- SMS/Text messaging

While I've tried to discuss the options generally, the focus of this article is on our choices here at Boise State University. Where we've explored several options and found more than one to be desirable, I'll mention the various options.

### *Email Reference*

Most libraries have been offering email reference service in some form for a long time. Those who do not usually have a considered reason, such as lack of staffing or a clientele that does not favor this means of communication. There are a few variants of email reference. The simplest to implement is just an email address posted on the library website. The upside of this is, as noted, the simplicity. The downside is that patrons may find opening their email account, entering your address, and composing a message to you more cumbersome than, for instance, filling out a form on the website (forms are a bit more complicated to set up; more information is available at the [W3C website](#) ).

Newer tools such as [LibAnswers](#) make email reference easy for both librarian and patron. On the patron side, LibAnswers looks like a search.

**Library Questions & Answers**

[ASK US](#)

**36 Answered Questions** | [Browse All](#)

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**I want to challenge a college course. Does the Library have materials that will help me study for it?**

**Topics** **Live Chat**  
CHAT with a librarian 24/7

[Campus services](#) Journals and articles [borrowing building collections](#)  
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After typing in a question and clicking "Ask Us," the patron gets some suggested answers that have been culled from previous question/answer sets, as well as a form that requests contact information and more details on the query.

**Library Questions & Answers**

[ASK US](#)

This question has not been asked yet.

**Submit your question to us and receive the answer by email!**

**Your Question**

Question:

More Detail/Explanation (500 chars. max):

**Your Info**

Your Email is required, but it will **never** be shown in public. We will email you the answer, when it's available. The Name is optional, if left blank it will be "Anon", if the name is entered it will be shown on the answer page.

Your Email:

Your Name:

[Hide Results](#)

**36 Answered Questions** | [Browse All](#)

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What's really neat about LibAnswers is that it saves questions and answers in a knowledge base that both librarians and

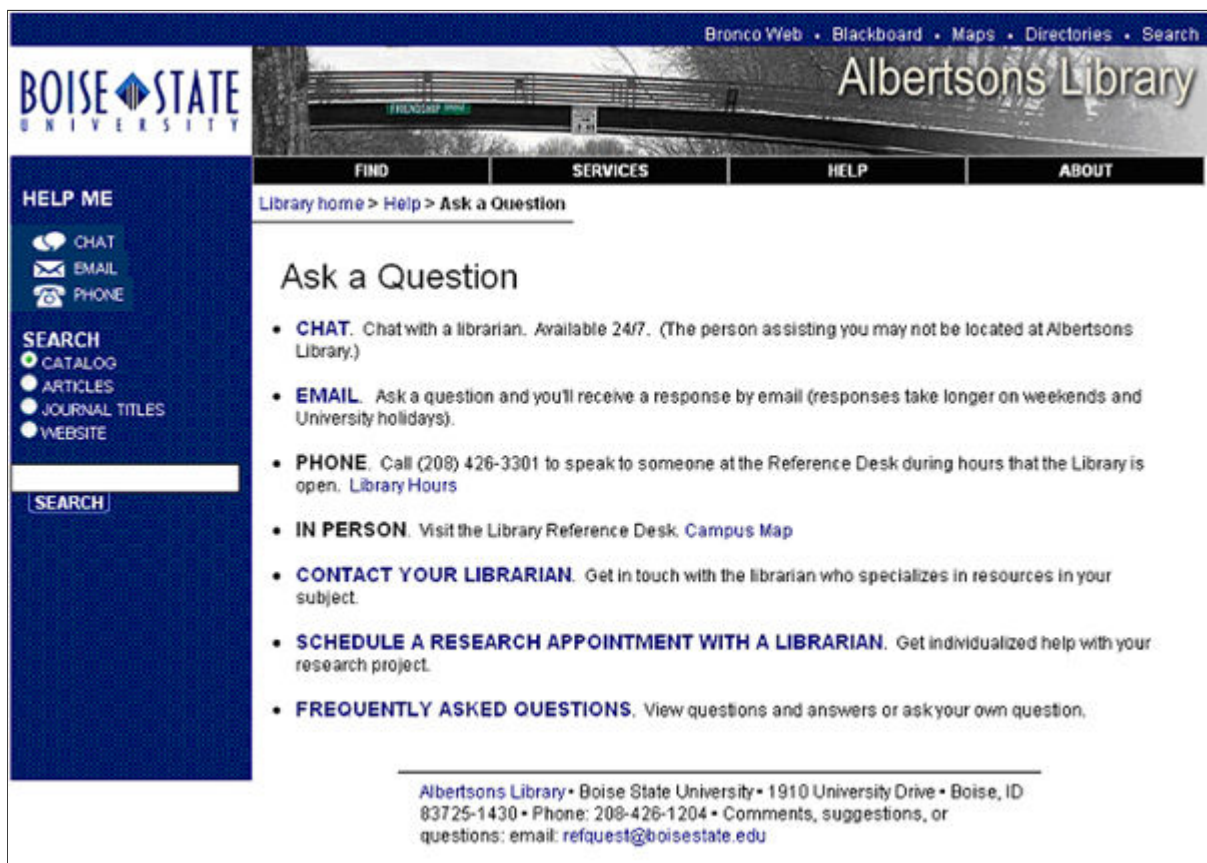
patrons can browse or search to find information. Answers to questions that are private can be disincluded from public display. From the librarian perspective, LibAnswers is no easier or more difficult than checking email, but is much more full-featured. Answers are categorized by keyword and a robust statistics module is included. The downside? LibAnswers isn't free. However, it's not expensive and is worth investigating.

### Chat Reference

Chat and instant messaging are certainly not new, nor are they new to libraries. The possibilities for chat reference range from free (Meebo, AIM, Yahoo! or another IM service) to reasonable (Library3lp) to robust-yet-pricey (QuestionPoint).

The problem with offering an "ask a librarian" service via an instant messaging platform is that it can be incredibly time consuming. With all of our work, who has time to monitor a chat window all day? And if it isn't monitored, why provide the service? It's remarkably frustrating to type a question into a chat window and get no response.

**LibraryH3lp**, a chat client written specifically for libraries, has a solution to this problem. This easy to use instant messaging tool is not free, but the pricing model is extremely affordable (ranging from \$250 to \$600 based on population served) and an unlimited free trial is available. What LibraryH3lp offers that a generic IM client does not is the ability to turn the display on or off based on whether a librarian is logged in. You can see an example of this in the two images below. The first is our "help" web page when no librarians are logged into Libraryh3lp.



In the second instance, a librarian is logged in, and you can see the chat widget (which is tech-talk for "the doohickey where you type your question") is displayed. In our case, we direct people to the QuestionPoint consortium if we aren't monitoring LibraryH3lp, but one could just as easily direct patrons to an email link or a telephone number.

BOISE STATE UNIVERSITY

Albertsons Library

FIND SERVICES HELP ABOUT

Library home > Help > Ask a Question

HELP ME

CHAT  
EMAIL  
PHONE

SEARCH

CATALOG  
ARTICLES  
JOURNAL TITLES  
WEBSITE

SEARCH

Ask a Question

Ask a BSU Librarian

Type here to chat. Press ENTER to send.

- **CHAT.** Chat with a librarian. Available 24/7. (The person assisting you may not be located at Albertsons Library.)
- **EMAIL.** Ask a question and you'll receive a response by email (responses take longer on weekends and University holidays).
- **PHONE.** Call (208) 426-3301 to speak to someone at the Reference Desk during hours that the Library is open. [Library Hours](#)
- **IN PERSON.** Visit the Library Reference Desk. [Campus Map](#)

Other useful features of Library3lp are that it keeps good statistics and it allows librarians to transfer calls to one another, if they are both logged in.

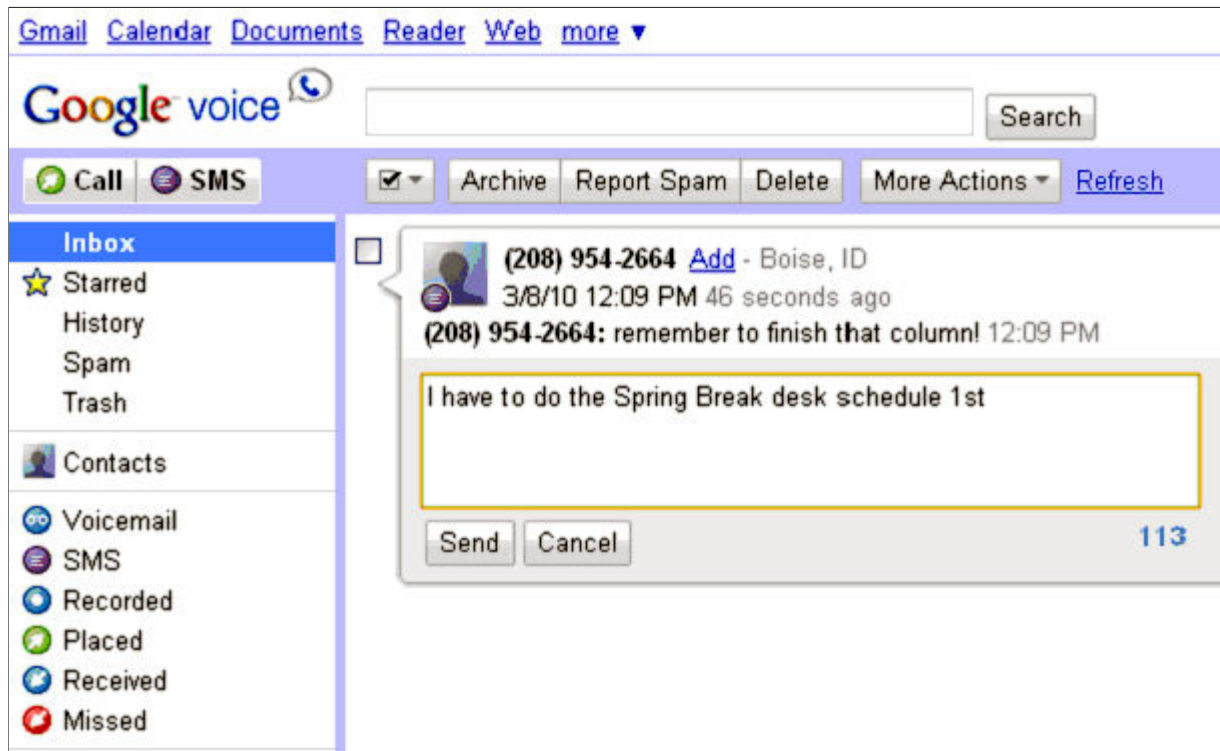
A more robust option is to join a collective, such as OCLC's [QuestionPoint](#). As many of you know, with QuestionPoint your library contributes a certain number of hours per week, forming a collaborative that provides 24-hour service for your patrons. While 24-hour reference service is a wonderful thing to be able to offer, this is a more expensive option than the others, in part because OCLC staffs the service during hours that libraries can't. Alternatively, a mini-collaborative could be set up using one of the aforementioned tools. We used to have such a collaborative in Idaho (using QuestionPoint), but it has since dissolved.

### *SMS/Text Reference*

SMS stands for Short Message Service, and is a fancy way of saying "text messaging via cell phone." There are a number of options for offering this type of service. The simplest is to purchase a cell phone with a service plan. While an iPhone would be nice, a simple cell phone with a keyboard would suffice.

For fully supported solutions, there are options such as Refchatter by [AltaRama](#), [Text a Librarian](#) by Mosio, or the new [LibAnswers SMS service](#). These are all fee-based products that have an email-like interface for responding to text messages. For libraries who can't afford a full-featured plan, a simple free solution is to set up a Google Voice account, select a telephone number, and publicize it. Patrons can then send an SMS (text message) to that number, and you can retrieve it just as if it were email--only shorter. For an example of that, see below. Notice that the blue number below my return message indicates how many characters I have left to meet the 160 character limit.





Our biggest concern with SMS reference at Boise State (which we will be trialing this summer, using LibAnswers SMS) is that it will be too successful. Texting is incredibly popular, especially among certain age groups. There's no perfect answer to this problem, but when we roll out new services we start quietly with a pilot before beginning our marketing efforts, and we try to start new services during slow times of the year.

### ***Putting it all Together***

Staffing email reference varies by library, with some delegating it to one person while others take turns or handle it while at the desk. All of these systems have advantages and disadvantages, and will depend on the organizational structure and culture. The one-person model can, obviously, become tedious (for that one person) over time. On the other hand, my experience being the email reference person for several years at the beginning of my career is that I was able to form relationships with frequent visitors, which was rewarding in a way that taking a one-week shift a few times a year is not. Clearly, however, one person cannot handle all of the email, chat, and SMS reference unless that is his or her full-time job. Taking turns, then, is the most viable solution for most libraries.

It's essential to remember that each of these tools serves the purpose of helping us to increase our reference reach, and should be viewed as part of our total reference program. Libraries, even in good budget times, have finite resources. We have to consider what our patrons will find most valuable and convenient, as well as the most efficient use of staff time and technology resources. Answering the first question--what reference options patrons will use and find useful--can be difficult to determine and a moving target. One way to approach this is to run pilot projects; try something out (be sure to note that this is a pilot on your marketing materials and website) and see if it's used (and if so, how it affects your staff workload). Another option is to conduct surveys or focus groups, with the caveat that *liking the idea* of a service and *using a service* are two different things.

Like all services, assessment can give you valuable information about whether (and when, and possibly how) your distance reference is being used. How to do this is another article altogether, but an obvious first step is to simply gather use statistics, which will tell you whether the service is being utilized. A well-designed program of statistics gathering can also help with the move from beta to a "real" service, by informing staffing decisions. For instance, presuming that you can't offer chat reference 24 hours a day, 7 days a week, what are the best times to do so?

## *A Final Note*

Given how quickly technology and generations change, there are never guarantees that what's working today will work tomorrow. Ideally, it's best to try new things without too much hullabaloo and as inexpensively as possible. In some organizational cultures this is difficult or impossible, in which case the strategy may simply be to stick with the basics--a traditional reference desk and email reference, perhaps. Over time, the definition of "the basics" will change, and you can reevaluate.

## *Resources*

**Digital Reference blog** - <http://www.teachinglibrarian.org/weblog/blogger.html>

This is a useful blog to read if you're interested in learning more about these and other great tools for the contemporary reference librarian. Stephen Francoeur presents news and considered opinions about virtual reference tools in easy to read language. The post [Digital Reference Services in 2009](#) is an excellent overview of the topic.

**Handheld Librarian** - <http://handheldlib.blogspot.com/>

This blog is a companion to the very affordable (\$69 per individual or \$119 for a group) Handheld Librarian Conference and is a good place to keep an eye on handheld computing devices as they pertain to libraries.

**Library Success' Online Reference Page** - [http://www.libsuccess.org/index.php?title=Online\\_Reference](http://www.libsuccess.org/index.php?title=Online_Reference)

This page on the Library Success wiki has some outdated links, but is still a useful resource for finding software and examples of other libraries providing these services.

*Ellie Dworak is the Reference Services Coordinator at Boise State University. As a public services librarian, she is an advocate for usable, accessible online tools.*