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Virtual Reference Services in a Real World

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Virtual Reference Services in a Real World

NOW THAT LIBRARIES have substantial digital collections available to users from their homes or offices, it isn't surprising that remote access ("virtual") reference services are the latest trend. *LJ* recently provided an overview of virtual reference services and reported on local progress and national initiatives to implement online reference help 24 hours a day, seven days a week (see "The Shape of E-Reference," *LJ* 2/1/01 p. 46ff.).

Recently, I asked the directors of reference in the academic member libraries of the Association of Research Libraries (ARL) to describe changes in their reference services over the last three years and how electronic resources have impacted them. Although most do not yet offer real-time virtual reference services, all offer some reference services to their remote users, and expanding virtual reference services is in the planning stages at many more.

Range of reference services

Librarians in 70 libraries responded to my questionnaire, which also included detailed questions on their electronic collections. These university libraries allow their patrons to pose reference questions in a variety of ways. All still maintain reference desk/drop-in reference services and telephone reference, while practically all now offer e-mail reference (99 percent) and reference by appointment (96 percent). The newest option, real-time virtual reference, is already offered by 20 of the 70 libraries (29 percent).

Although they all report that drop-in service at the reference desk is still used the most, over 84 percent of these libraries reported a decrease in the total number of reference questions asked at the desk. Pa-

trons now have access to a wider array of resources and can more easily answer basic questions on their own.

Still, the questions that come to the reference staff appear to be more complex than in years past and take more time on the average to answer. Often, by the time the patron approaches a reference librarian, he or she has already searched the web and several other electronic resources. (For a more detailed discussion of this phenomenon, see Carol Tenopir and Lisa Ennis's "Reference Services in the New Millennium," *Online*, Jul./Aug. 2001.) Answering questions without the patron present adds even more to the complexity of the reference process.

Remote users

Every library is experiencing an increase in the number of users who never (or seldom) come to the physical library. Some remote users rely on the telephone—at least one librarian reports an increase in telephone reference questions. Most others prefer e-mail or chat. All options fill a need, as one respondent summarizes:

These technologies help us provide better reference service by enabling us to reach patrons at their time of need, not only when they come into the library. Each mode of communication has its own advantages and disadvantages, some questions being better suited for e-mail than for telephone, and vice versa. Having multiple options for communication means being able to help patrons more appropriately.

Libraries have worked hard to increase remote-access digital collections, so the change in expectations shouldn't be surprising. One large university now has "only one person handling the walk-ins and one person answering the phone and e-mail reference questions. It works well in the sense that so many questions can now be answered by electronic sources...the reference desk no longer has to be the focal point of reference service. The new technologies make this

possible. We will be exploring reference chat soon, for the same reason."

Libraries have made major efforts to make it easy for patrons to pose questions. This has been successful; a librarian reports that one of the biggest changes in reference services over the last three years "has been the amount of time that staff spend answering questions sent electronically—reference forms, ask a librarian, e-mail your subject specialist, etc." Kathleen Kluegel of the University of Illinois at Urbana-Champaign laughingly told me that she tells people "we do reference through every communication channel but the Psychic Network!"

E-mail reference

All but one of the libraries that responded to the questionnaire offer reference by e-mail. This differs from all other types of reference owing to the time delay. There is less immediate pressure because no one is standing at a reference desk or hanging on the phone line, yet e-mail adds other complications and often takes longer than in-person reference.

At one university library, "three years ago our e-mail reference questions were answered by two persons (a library assistant and our night-time librarian). Today, that responsibility is shared by all desk staff. During regular business hours, we staff a separate service point for responding to questions that arrive via telephone, e-mail, and online chat."

The time-shifted nature of e-mail sometimes allows reference librarians to "give more in-depth help than they might be able to receive over the phone." One university librarian explains, "Librarians handle e-mail queries and increasing requests for consultation appointments and provide help for users via our web pages. Almost every interaction includes an opportunity for instruction about electronic resources and their use. Reference staff have become teachers." Another reports that not only does e-mail correspondence continue to grow, "we are no longer only responding to reference queries but are advising patrons on such topics as print/down-



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ONLINE DATABASES

load capabilities of databases, the use of bibliographic software with electronic resources, and connectivity issues.”

Some libraries report a fairly low volume of e-mail questions, so reference staff can handle questions received electronically without much impact on their jobs. Other libraries report that e-mail reference is their fastest growing reference service as patrons get accustomed to it and as libraries provide reference links in multiple prominent places. Like many universities, the University of North Carolina (UNC)—Chapel Hill has placed an e-mail link on the library’s main web page “so the number of e-mail questions increases monthly.” Such prominent e-mail links may have unexpected consequences, as UNC reports that approximately 50 percent of its e-mail reference questions are posed by users from outside the institution.

A California university librarian reports a steady increase in e-mail reference “although the increase does not come close to the rate of decline in in-person reference activity.” This same librarian anticipates further increases in e-mail questions and instant popularity for a new real-time reference service when all incoming students are soon required to own a PC.

A Southern state university librarian reports, “While our desk service point tallies continue to go down, I think the total volume of questions is the same—but it is migrating to direct e-mail inquiries sent to reference staff in their offices.” This librarian reports the number of e-mail queries doubled from the academic year 1997–98 to 1999–2000.

Live virtual reference

E-mail reference is now old hat at most ARL libraries. (One respondent mentions that the library has offered a successful e-mail service since 1992.) Now these libraries feel it is time to move to virtual, live help. These services are still in the early stages (or, in most cases, still in the planning stages.) The Association of Southeastern Research Libraries has formed a committee to investigate and recommend software for real-time virtual reference. After an “unscientific trial” of virtual reference, Virginia Weathers, head, reference department, University of South Carolina, Columbia, tells me the library doesn’t plan “to do more with live reference until [this committee] makes its recommendation.”

A librarian at another Southern university believes that the college and university market for virtual reference software is expanding, although “our students and faculty don’t have the patience to learn and use this new tool yet.”

According to Rita Moss, Section head, reference desk, UNC—Chapel Hill, “The advent of virtual reference has been postponed in our institution. We will begin training and practice in June and hope to have everything ready to begin in August at the beginning of the fall semester. One thing that we have decided is that we will be offering it only for specified hours (to start, until we see how popular, or not, the service is). We will be offering it afternoons until about 5 p.m. and then for two or three hours in the evening up until about 10 p.m.”

At the University of Alberta, BC, a pilot project will go live in October 2001, offering 40 hours of service weekly. Virtual reference services don’t happen overnight. At both Alberta and North Carolina, planning teams set

Libraries that offer real-time virtual reference are still experimenting with software

goals, evaluate software, run pilot projects, and evaluate the impact on library staff.

The 29 percent of university research libraries that already offer real-time virtual reference are still experimenting to find the best software solution. They often begin with simple chat software, such as AOL’s Instant Messenger or Human Click, and conduct the reference interview via chat. Interactive chat is not always immediately successful—one librarian reports that “chat is not worth the time it takes away from other reference duties so far, but management of the service may evolve.” Others report successful pilot studies as they prepare to launch chat services, which may change over time. One librarian anticipates “that we will have librarians doing reference work from their homes using Instant Messenger in the not too distant future.”

Libraries that have offered chat reference services will soon be required to include more visual options in the reference process; as one librarian reports, “We will soon be adding collaborative browsing to our electronic reference options.” Isabel Stirling, associate university librarian, University of California at Berkeley, states the library is “experimenting with real-time web delivery/interaction with reference using software that will help ‘push’ web pages back and forth with the patron.”

Illinois’s Kluegel points out deficiencies of the current state of remote reference by conjecturing an example:

Now, a patron, a faculty member currently on leave in Iceland, is trying to research a topic. You need to help negotiate access, authorization, selection of resources, searching strategies on three different systems, dealing with output options, and all of this at a distance. One can’t see the same screen that the patron is seeing and so the opportunities for redirecting their searches in more productive paths are more limited and based on self-report and an active request for help.

Another librarian notes the higher costs “both in terms of staff time and staff skill level” for managing digital reference services. Users have higher “expectations for 24/7 access, with no tolerance for downtime (unlike the paper world where they had to recognize that sometimes the volume isn’t on the shelf).”

Many of the university libraries that do not yet offer real-time virtual reference will do so soon. One librarian feels it is “heartening to see the 24/7 reference service initiatives, especially when the commercial for-profit sector is entering the ‘expert assistance’ business, such as webhelp.com.”

Conference coming

Plans for virtual reference services are underway in many libraries or library organizations in addition to the 70 university libraries surveyed here, including the Library of Congress-sponsored Collaborative Digital Reference Service. This November, the third annual Virtual Reference Desk (VRD) Digital Reference Conference will be held in Orlando, FL. The VRD2001 theme, “Setting Standards and Making it Real,” implies that the time is right to make virtual reference a reality. For more information see www.vrd.org/VRD2001.