What is Electronic Reference Service?

Why are we looking into Electronic Reference Service? Is it because librarians will soon be replaced by these services? There are issues arising that with easy access to electronic reference sources, nobody needs a librarian anymore. Researches can already “self-serve” their information needs without any assistance from librarians or information professionals. Could this be true?

Before we try to find answers to this question, let us first look into the basics of Electronic Reference Service. By this I mean defining it and looking into the various kinds of services and our pre-work activity could probably stir some interactive discussions as well.

There are a number of terminologies that are used to mean “electronic reference”. Here are some terminologies:

- **Reference Service** - A library service using librarian's knowledge, print and non-print resources to answer reference queries that come from library patrons/clients through various channels (personal, phone, email, other electronic means).

- **Electronic Reference Service** - Reference service designed for remote users and identified by a specific link from a library’s website. (Goetsch 1999).

- **Online Reference/ Online Information Services** – the provision of help resources such as FAQs, electronic databases, and other electronic content and/or asynchronous or synchronous computer mediated communications (CMC) such as e-mail or chat. (Portree 2008)

- **Virtual Reference Service** - A reference service initiated electronically, often in real-time, where patrons employ computers or other Internet Technology to communicate with reference staff, without being physically present. Communication channels used frequently in virtual reference include chat, videoconferencing, Voice over IP, co-browsing, e-mail, and instant messaging. (Gregory 2009)

The ALA website differentiates electronic and virtual reference by stating that while online sources are often utilized in the provision of virtual reference, use of electronic sources in seeking answers is not of itself virtual reference. Virtual reference queries are sometimes followed-up with telephone, fax, in-person and regular mail interactions, even though these modes of communication are not considered virtual. If we analyze these statements, it is the “source” of information that makes the service “virtual”.

Now, using these various definitions, here is the definition that I would like to propose:

- **Electronic Reference Service** – A library service that uses a librarian's knowledge to provide onsite or remote clients with relevant information based on a request that was initiated electronically. The sources of information may be print or non-print resources.
**What are the kinds of Electronic Reference Services?**

Here, I presented the most common electronic reference services used in most libraries.

1. Email
2. Chat/IMs – Yahoo, MSN, AOL,
3. SMS
4. Blogs/Wikis/Online Social Networking Sites (Facebook, Twitter, etc.)
5. Websites
How do we establish an electronic reference service?

Basically there are some factors to consider in beginning an ER or VR project. The first question to answer is “what do you want to achieve?” This would include which resources are readily available to start and run the service, who the users will be and how the service will be delivered.

Here is a sample of a project implementation diagram making use of an Instant Messaging Reference Service.
Needs assessment is a consultative process, it requires the identification and involvement of different stakeholders. It should provide the rationale for the formulation of goals and objectives and identifies areas for potential improvements in current reference services. The scope and limits of the online service should be considered in allocating resources. Such resources should achieve service objectives and reach project implementation. Technology often changes, so it is important to get the latest information on features, functionality and availability. Some websites that provides comparison of the different IM providers are:

1. The Wikipedia community

2. Instant Messaging Planet
   www.instantmessagingplanet.com/public/

3. Kolabora

4. Information Week
   www.informationweek.com search for "messaging"
The VRS policy should be aligned with the mission of the institution and all other policies developed by the library. It is important to get staff support early. Reference staff involvement along each step of the implementation is essential. Some important decisions are deciding who will staff the IM VRS desk, how and when it will be staffed, and how best to train the individuals responsible for IM VRS. Ideally, staff will be recruited based on interest and aptitude. Promoting a new service is a challenging process, but if the previous implementation decision points have been completed successfully, the marketing campaign will be primarily about getting the word out within the community and educating the users about the service. The scope of evaluation that is possible will depend on whether the library will keep the log files and transcripts of online virtual reference sessions. The purpose of evaluation is to enable a cycle of continual improvement. (Dalston 2008)

ALA also prepared Guidelines for Planning a Virtual Reference Service that may also be applied to Electronic Reference Service:

1. VR/ER should have a view of long term integration with the Reference Service. It shouldn’t be treated as an ad-hoc service;
2. There should be management and staff support;
3. Representative members of the administration and reference library staff and target audience should be involved in planning and promotion of the service.
4. Technical or computing staff should be involved in the planning, implementation, and maintenance of the infrastructure needed, and compatibility with existing library software and infrastructure.
5. Consideration in collection development decisions, selection of electronic reference sources, and especially licensing issues that might affect use of resources to serve off-site patrons.
6. Library staff and administration should facilitate regular assessment of the program’s effectiveness and commit to adjustments as needed. Assessment should be comparable to the assessment of other reference services.

Furthermore on assessment, you may find ways to improve the service or painfully discover that the service is not worth continuing. This is the essence of proper planning, so that a project will not just be put to waste.

The comprehensive guidelines on the provision of the service are enumerated in the ALA website.

**Examples of some electronic reference service projects**

A. **New York University** Library IM service uses an open software called Trillian that acts as a portal that connects to the major services, Yahoo, MSN, AOL. They started small, ground-up approach that focused on reaching users on their own terms. They involved librarians who were familiar with the technology and showed interest in learning more about it. Recruiting was organic and voluntary, no mandates and no one was forced to serve. They started with serving 11 people and their patrons started to grow over a year. Now they’re looking into extending the service even after library hours because this is the time students do most of their researches.

B. **Paratext** is a company that developed “Reference Universe” a commercially available software that aggregates all of the information of publishers’ indexes and abstracts allowing
library patrons to search within the institutions holdings. This is not a database but more of a service for libraries and institutions to maximize the use of their current online subscriptions.

C. Evaluating VR in an Academic Library, a study written by Toby Faber, Jeanne Holba- Puacz, Rowena Li, and Wendy Stephens, investigates the usage patterns and service effectiveness of VRS in a large academic library. Complete transcripts of both live chat and email reference questions are analyzed and considered qualitatively by examining the process of the reference interview, the correctness and completeness of the response, the authority of sources cited and recommended and the inclusion of follow-up inquiries. The results of an online survey asking patrons' experience with VRS are also analyzed. This study can provide insight into patrons' information-seeking behaviour and information needs for VRS and proposes service improvement to better meet patron information needs in response to this study's findings.

What are the ERS Trends?

1. Real-time reference services (Chat, IMs) – 24/7 “Ask” service
2. Consortial buying
3. Webcasts/Podcasts/Videoconferences
4. Call center information service – 24/7 service
5. SMS Alerting Service

What are the Challenges to doing ERS?

Administrative
1. Increased expenditure on e-resources without increase in Library’s budget
2. Licensing terms
3. Staff competencies and willingness to participate
4. Documentation of e-reference transactions
5. Confidentiality, liability and publicity
6. Evaluating Electronic Reference Services
7. Training and long term maintenance

User Expectations
1. Volume of request – 24/7 service
2. Marketing
3. Knowing clients’ preferred style of information delivery (email, phone, chat, etc.) librarians can not impose their preferred style of information provision.
4. Knowing your market
5. Speed with which libraries have moved online/ Bridging the print-online divide. Keeping up with what publishers produce. Some examples of what to watch out for from publishers are (Roncevic 2008):

EBSCOHOST 2.0:
GLOBAL ISSUES IN CONTEXT
OXFORD LANGUAGE DICTIONARIES ONLINE
CQ CONGRESS COLLECTION
POP CULTURE UNIVERSE
WORLD VITAL RECORDS.COM
SALEM PRESS
Insights

Electronic Reference Service is a great idea-helping customers from afar, making it easier than ever to get information.

The future, and some might even say the present, for the library professional is the digital library.

Designing a virtual reference service is a challenging, but not an insurmountable task, and practical experience is the best means to inform and prioritize the virtual reference research agenda. By embracing IM VRS, information professionals are realizing Ranganathan's Five Laws of Library Science and keeping the information user at the center of the equation. Ranganathan's visionary concept of the library as a "growing organism" that constantly adapts and changes aligns well with the trend to use the Web to reach beyond the physical limits of the library. (Dalston 2008)

Librarians should serve as Reliable filters for users – users need more than reliable information on a certain topic but the best information.

Librarians to focus on customer service. Librarians are service providers, not gatekeepers. We should extend all possible information and knowledge to people and the experience of the end user is going to be our best marketing device at the end of the day.

One of the valuable offerings of librarians in the digital age is the human intermediation of information needs. This intermediary connects the users to the information needed and can assist with advice about using the information retrieval systems and working with information.

Libraries should compete with the malls especially during these times of economic hardships. We should make the library the gathering spot where people can use the services, collections and the Internet and collaborate.

References:
ALA Reference and User Services Association Website.
http://www.ala.org/ala/mgrps/divs/rusa/resources/guidelines/virtrefguidelines.cfm#


