
From Reference Class to Reference Desk: One Year Later

by Betty J. Moore

Hil! How may I help you?" I would ask library users as I worked as a student Information Assistant in the University of North Carolina at Greensboro's Jackson Library reference department during the 1996-97 academic year. I was enrolled in UNC-G's Master of Library and Information Studies Program; my MLIS program also included observation and experience at a high school media center and a community college. I helped students in their searches for books and articles, then generally left them to work on their own or saw them head for the stacks with lists of materials to look up. I would ask them to come back to the desk if they had difficulty finding what they were looking for.

Transition to the Real World

Now picture my first days on the job at the information desk of a public library in the summer of 1997 as a newly graduated librarian with a fresh MLIS degree.

"Hi! How may I help you?"

"I'd like the CEOs of these five companies, along with the company addresses and phone numbers," says one caller. "Call me back and leave the answers on my answering machine."

"We've just found out my wife has liver cancer and I want to know more about it," says a man at the reference desk, obviously stunned by the recent diagnosis. He later asks which of various treatments mentioned in medical sources would be best to try.

"What percentage of all U.S. prison inmates are African American?" asks another caller who then goes on to ask

seven or eight other statistical questions. "Can you make copies of these? I'll pick them up on my way home from work."

"The courthouse said you'd know what forms I need to file for my own divorce," says the woman at the desk, a friend at her side for moral support.

"I'm a nurse and have to give a forty-five-minute presentation on "Patient Recovery" in two days. Can you research this for me?" asks one caller. "I don't have time to research the topic."

Middle school students arrive, some of them essentially asking library staff to do their homework for them. (Some would also like us to provide all supplies for their projects and proof-read, or type, their final papers.)

Drive-through, Pick-up Window

Now let me get this straight, I mused. As a public librarian, I'm here to meet all their information needs, yet I'm not a doctor, lawyer, social worker, or accountant. And I really don't think the teacher expects the librarian to do the whole assignment he gives his students. While I had learned in library school that public librarians often did more of the work for library users than

academic ones did (the terms "handholding" and "spoon-feeding" were mentioned), I am surprised to discover how many public library customers expect "drive-through, pick-up window" reference service. In my reference class, I had learned of some of the differences between types of libraries. For example, formal bibliographic instruction is considered to be less common in public libraries than in academic or school libraries.¹ William Katz says that public libraries may have a high percentage of adult users, compared to other types of libraries, and may also find that fifty to sixty percent of its questions are ready-reference rather than research questions.²

Was I expected to go all the way to the final answer for each patron, or show the source, explain how to use it, and leave the patron to complete her research alone? Should I help some patrons, such as older adults or county commissioners extensively, but just get school children started and encourage them to continue the process on their own? Should I package some library use instruction with each answer, as each Cracker Jacks box comes with a treat? How far should I go to chase

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down answers? Should I call Washington, DC, then fax several pages to callers living out of the area? Would I be guided through these decisions by written library policy, unwritten guidelines, or my own discretion?

My Continuing Education

Fortunately, I have an information services supervisor, as well as experienced co-workers and library guidelines to help me learn how to deal with these questions. At Rowan Public Library (RPL) I read the *Information Services Policy Statement* section that reads, "All requests for information are legitimate and important to the library user. With this understanding, every effort will be made to provide information services to library users of all ages and circumstances in a manner that is courteous, equitable, and prompt." "Our overall philosophy," according to Information Services supervisor Suzanne White, "is that we provide good customer service."³ RPL Information Services has further guidelines and procedures that include answering each customer's questions as thoroughly as possible. They also suggest that staff members take customers to the shelves whenever possible and that all questions receive equal treatment regardless of their source. Staff are expected to use judgment to determine which questions to answer completely and which to guide the patron in source selection.

Homework questions are treated in the same manner as other reference questions. When students and other customers in the library are guided to continue research on their own, staff are encouraged to tell them to return to the information desk if they need further assistance. When callers request help on complex assignments, staff may suggest that callers come into the library for assistance. A student who calls asking for five articles to be copied and ready for pickup may be told to come into the library so we can "make sure this is what you need."

Staff who are involved in questions that may take more than five or ten minutes to answer are expected to keep an eye out for the desk and an ear out for the phone so that the desk partner is not left to handle all other requests alone. Customers may be left to work alone while the librarian helps others, then returns later to see how the patron is doing. Staff also must maintain a balance between helping people in the library and those on the phone. Phones are answered quickly, but if a staff member is helping another

user, the phone request is written down and a return call is promised.

Staff receive many specialized medical, legal, financial, and tax questions; they assist customers in finding information but do not give advice in these matters. Values of collectibles may be quoted from library sources. Library guidelines say it is often appropriate to refer patrons to professionals in these fields. Staff members will make long distance calls for ready reference questions, but will provide the phone number to the user where more extensive questioning is needed. RPL staff will make some copies, with payment expected at pickup, and will fax materials for a fee. Library instruction takes several forms, including orientation tours for students. Classes were held showing use of the OPAC when it was new. Currently, classes are offered in Internet and e-mail basics.

"It Depends."

As I approach the end of my first year as a professional librarian working at the information desk, I am reflecting on what I have learned this year. Since I have wondered where other North Carolina public librarians draw the line between providing the final answer for each patron and guiding them to find the answers for themselves, I conducted an informal telephone survey of several public libraries selected from the current *Statistics & Directory of North Carolina Public Libraries*.⁴ I polled several reference department supervisors, other staff members, and library directors from county, regional, and municipal systems across the state.⁵

I asked four basic questions, but welcomed discussion and other comments. (1) Where do you draw the line between finding the answer for patrons and teaching them to find the answer on their own? (2) Do you have different levels of service for different patrons, including students, the elderly, business people, and local officials? (3) Does your library offer instruction to patrons? If so, which of these types—formal classes, handouts, comments during the reference interview, or others? (4) Finally, does your library have a written policy about this, are there unwritten guidelines staff follow, or is the level of service variable and left up to the discretion of individual staff members?

The most common comment I heard was, "It depends." While not a very scientific, quantifiable response, it speaks to the variety of situations library staff face, as well as the discretion

they often must use to deal with situations on the spot. Most respondents, many of whom referred to the Maryland Model of reference interviewing, said they try to have a thorough reference interview, using that to determine and clarify the question. At the same time, they work to determine the patron's needs and ability to complete the research alone, with some assistance, or with the staff serving them the completed answer. "We feel people out during the reference interview," said Stephanie Stout of Nantahala Regional Library, headquartered in Murphy. "If somebody is motivated and can handle questions on their own, they usually indicate that and we back off." Several said they also used the reference interview for instruction. Shearin Antonowicz, Head of Reference Services at Greensboro Public Library said, "We try not to just pre-package information for people." Staff there try to be guides rather than give the final answer.

Dave Fergusson, Head of Forsyth County Public Library's Headquarters Branch in Winston-Salem said that they either answer the question all the way or refer the patron to someone who can provide the answer. "To be honest, it depends on the librarian. I think, probably more than many libraries, we give the answer." Librarians there have unlimited phone access to answer questions. He said that with technology becoming more advanced, "if you're showing *how* to find the answer when others show the answer, you're in trouble."

Levels of Service

Several respondents gave examples of giving different service to certain patrons. For example, Anna Yount, Director of the Transylvania County Library in Brevard, said their area has a large retirement community with many senior citizens. "Some are just not able to use the OPAC. They can't see it. It's hard for them. We often suggest they may sit at the table and someone will get their stuff for them." Another commented that while older patrons may need more help with online catalogs, the Internet, and CD-ROMs, they are often better at finding books on the shelves than young patrons. Others mentioned going the extra distance to provide what their local officials requested.

Many librarians said they encourage school students to do more of the work on their own. Several librarians said they believe that the intended

purpose of student assignments is often to learn the research process rather than have librarians present them a stack of books with marked answers. More than one said, however, that they allow as much time and effort for a student's question as for any other. Where students are assisted in getting started and left to work on their own, staff suggest they come back for more assistance if they have difficulty in their searches. Fergusson said of Forsyth, "Most of the time we try to be fairly consistent. We don't discriminate against kids." Julia Hicks, Director of Brown Library in Washington, said different types of patrons probably are treated differently. She prefers that everyone be treated the same and tries to model that to her staff. Fourth graders should get as much attention as businessmen looking for stock quotes.

Instruction Practices

The most common instruction mentioned was that given during the reference interview. No one mentioned formal classes on basic research processes and techniques. Most told of classes now given on Internet use, with NC LIVE classes to begin soon, after staff have received training. Another mentioned classes given in genealogy search techniques and resources. At Greensboro Public Library patrons can make appointments to learn to use CD-ROM products. One librarian said they try to notice when people are asking the same thing over and over and make a sign or handout to answer those common questions. Signs, handouts, library tours and orientation are provided as means of instruction in many of the libraries surveyed. Fergusson said, "We'd love to teach them. But if they don't want us to, we don't force it." He added, "Our job is to give them what they want. Library education is not our goal."

Written Policies

Written policies, procedures manuals, and guidelines are somewhat more common in the larger libraries. Rather than mention how much assistance to give patrons, some policies just refer to staff using discretion, being aware of leaving desk or phone unattended for long periods, and trying to maintain a balance of time spent helping each patron, in-house and by phone. Several smaller libraries have no written policies covering these situations. They rely

on job descriptions, modeling other staff, and staff development training to promote the expected practices for their library. Greensboro has a written procedures manual, including phone time limit. Staff at Forsyth are guided by staff training and expectations of library staff, as well as by the demands of patrons after years of such service.

How Far Will We Go?

Several respondents volunteered mottoes such as "Customer service is our top priority," "We go the distance," or "Our basic philosophy is to try to do the best we can for everybody." Yet, as one director said, "I think everybody practices triage." With limited staff, resources and time, librarians sort out and classify which questions and which library users they are able to answer most completely. The number of patrons waiting at the desk or on the phone, time of day, and how much help a patron actually asks for are other factors that affect the amount of assistance given.

Perhaps the biggest factor is how

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much time the librarian has. The 10 A.M. patron may get much more extensive help than the 4 P.M. one. Peter Bileckyj, reference head at Wilson County Public Library in Wilson said that, while they try to be fair to all, the reality is that on a slow day librarians will spend more time with a patron who is slower at catching on. How many phones are ringing and how many patrons are waiting at the desk are also limiting factors. Several referred to a phone reference time limit, one to say they do not include "the infamous time limit" in their procedures. Another said they do try to limit phone calls to five minutes and answer what they can during that time.

While having the availability of many new technologies and NC LIVE gives librarians access to some answers more quickly, thereby saving time, it also increases the number of places to look, which may take more time. Since

there is a greater chance now of finding the requested answer through the library's resources, librarians may refer elsewhere less frequently.

Another factor is how much help the patron wants. Some are familiar with the library layout and the Dewey Decimal System and prefer to look on their own, once the librarian has helped them narrow their searches to a particular subject, area, or book. Others seem frightened of the whole library experience and would like someone to "hold their hand" as they go to the book shelves or use the copier, online catalog, or computer. The term "spoon-feeding" carries the negative connotation of helping someone do something that he really ought to do himself. Yet several libraries enthusiastically, or at least willingly, give the patron whatever is requested.

A staff member at one smaller library said enthusiastically, "We go the distance!" Transylvania County's Yount said, "We carry books to the car. We've even taken someone to the doctor! Service is a priority for us."

Most people, whether at larger or smaller libraries, mentioned limited staff. Bileckyj said that with a reference staff of three, their goal is to show the person the material and show them how to use it. Greensboro offers appointments with subject specialists since staff are able to give more personal service when they are not working on the desk. Their business specialist has the most requests; others request appointments with their genealogist for family research assistance and their documents specialist for statistics and demographic information.

Distinctions also are made between ready reference and extensive research questions. Stout said they were not able to fax somebody "all the Johnsons in Cherokee County." Kathy Kahn, Director of Mooresville Public Library said that they referred people with more extensive questions, especially ones requiring technical or business expertise, to larger libraries such as Iredell and Charlotte-Mecklenburg. They provide the other library's phone number, then suggest the patron make the call on his own. Forsyth provides a distinct telephone reference department each afternoon, where staff answer questions quickly or refer to research departments if needed.

In addition, library staff within

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one library may differ in how much assistance they offer. For example, the director of one library commented that there is no consistency among that staff about whether to completely find the answer for the patron or give instructions and leave the search to the patron. Therefore, some staff tell phone patrons they must come in to the library and others find the answer and give it on the phone.⁴

Finally, public libraries remain aware of their role as tax-supported community agencies as they decide how much assistance to offer. Several respondents spoke of trying to use tax money responsibly, whether by limiting long-distance calls and faxes or by giving taxpayers the full service they have paid for and come to expect.

Survey Summary

This informal phone survey was a good starting place for discussion and possible future research. With its small sample and possibility of multiple varied answers, it did not attempt to be scientific. The amount of help given, and the place the line was drawn, varied not only from library to library, but also from librarian to librarian. In addition, the same librarian operated differently depending on the patron's need and ability, the level of activity at the desk, and other factors. About half of the respondents said they gave different levels of service to different groups of users, generally students and the elderly. Most offered some instruction, mainly one-on-one during the reference interview, but increasingly, through Internet and NC LIVE classes. Most said their library's written policies did not address these questions. Library staff generally are guided by unwritten guidelines, often taught in staff training upon employment. Then much is left up to their discretion based on factors mentioned previously.

Literature Review

A review of library literature reveals several studies concerning how much and what kind of assistance libraries give users and what attitudes librarians and library users have about instruction. I learned that the term "spoonfeeding" does not appear in the *Library Literature* database, even though it was mentioned by several of the librarians interviewed.

Roma Harris explored the value conflicts underlying the information

versus instruction debate.⁶ She found that the majority of those surveyed agreed "that user instruction is desirable in public libraries and that it should be a regular part of reference transactions (not only when users request it)." Her study found no consensus, however, regarding the teaching roles of librarians, patron self-sufficiency, and the "spoonfeeding" of public library users. She measured attitudes of librarians about bibliographic instruction and showed the wide polarity in the debate. While over 90% of those surveyed agreed with the statement "bibliographic instruction in public libraries is appropriate for students," only 50% agreed that "the primary goal of reference librarians in public libraries should be to help people become independent users of the library." Furthermore, only 40% agreed that "reference librarians should avoid spoonfeeding information to public library users."⁷

Harris quoted comments of several of those she surveyed.⁸ One said, "Part

... public libraries remain aware of their role as tax-supported community agencies as they decide how much assistance to offer.

of the process of question negotiation is determining if bibliographic instruction is needed, desired, and within the user's capacity." Others commented that they were glad to assist any library users who wanted to find out how the library works and become self-sufficient users. Otherwise, one librarian said, "information should be given without instruction." Another agreed, saying "the public comes to the library for an answer to their question, not for a quick lesson how they should go about finding it themselves ... Librarians must realize that increasingly we are a service industry (not education) and that the public expects the same of us as they do a clerk at a department store." Or a bookstore.

Susan J. Diehl and Terry L. Weech focused on another aspect of this discussion in their article "Library Use Instruction in the Public Library: A Survey of User Preferences."⁹ They surveyed library users rather than librarians.

Their research addressed the questions of whether public library users think public libraries should offer instruction in library use and also whether these users "personally want to receive instruction in the use of the library." Library users were asked whether they would prefer to receive an answer only, receive an explanation only, receive both, or be given a choice of which they would like to receive. Over 50% said they would prefer to receive both an answer and an explanation of how to find that answer. Twenty percent preferred a choice.

Library users also were asked which method (a class, a booklet, while they were asking the question, or a handout near the item) they preferred to receive instruction. Forty-six percent preferred "the one-on-one experience of the reference interview" as the way to receive instruction. Only 18% preferred a focused setting, such as a class.

Shelly Adatto described the user education program at the Seattle Public Library, stating that "teaching the public to become successful, independent library users is a key goal of user education at the Seattle Public Library." Adatto gives brief summaries of several courses Seattle offers, including "Take Charge of Your Information Needs!" "The World of Book Reviews," "Magazine Research Techniques," and "Computer Search Techniques." The courses focus on "learning the process of using and locating materials," rather than reviewing bibliographies.¹⁰

Increasingly, library users ask librarians to help them evaluate the quality of online information. Should librarians advertise Internet availability at the library, then refuse to help evaluate sites because of librarians' traditional neutrality toward materials? In a pertinent recent *Library Journal* editorial, John Berry III exhorts librarians to take on a role they have avoided in the past. "When I went to library school, we were told that librarians did not interpret or analyze information but merely helped people find it... We were warned not to 'spoon-feed' students or other information seekers." He states that people today are flooded with information and need advice on interpreting and evaluating as they choose Internet sites relevant to their needs. He urges librarians to take on what he calls "this crucially needed but high-risk role of information advisor. If we don't offer that kind of professional information service, who needs us?" he concludes.¹¹

"Used Car Salesman" Approach

The ultimate in customer assistance can be found in an *U*N*A*B*A*S*H*E*D Librarian* reprint of an article submitted by Trisha Gillis, when she was a student intern at Orange (CA) Public Library in 1972. Her supervisor assigned her the task of testing the validity of his pet theory:

that large numbers of persons invading his library needed help but, because of shyness, fear of seeming ignorant, language barriers, or reluctance to 'disturb' the librarians, neither asked for it nor, because of (librarians') traditional attitudes, were offered it. His trial method of serving the unserved was to provide a stand-up, look-for-questions, lead-the-patron-by-the-hand Information Desk, personified by me. I am the used-car salesman of the Orange Public Library.¹²

Gillis patrolled the library 24 hours a week, looking for patrons showing "signs of struggle," then approached them with her most sincere smile and an offer of assistance. She decided that people like being approached and helped in this way and recommended that all librarians at least adopt the attitude of the library "floorwalker" and get the person together with the needed source of information as quickly as possible.

What I Learned Last Summer — And Beyond

Over the past year I have questioned and modeled more experienced co-workers, discussed library policy with my supervisor, and looked at how new information technologies are affecting library reference work, as I work to clarify my own philosophy of the information versus instruction question. I assist as much as I can, given the time

and resources available to me. I am learning that with current electronic resources available, I am able to answer many more questions more fully than librarians of days past. I am learning that on a slow Tuesday morning I may follow all answers to their conclusions and spend as much time with a patron as he wishes, including the 88-year-old man eager to see what the Internet is like. On a busy late afternoon during science project and tax season with both phones ringing, my desk partner deep in the stacks, and patrons lined up at the desk, I reluctantly may have to resort to pointing and asking people to wait or to do more on their own.

I often do throw in instruction during the reference interview, whether it's asked for or not. If they seem interested, I'll give more; if not, I proceed quickly toward the answer. When my time is very limited, or I need to refer someone to other professionals, I try to explain that with my most sincere smile and professional manner. I always suggest patrons check back with me if they need more assistance.

I knew from the start of my library training that I wanted a job where I would interact daily with the public. My goal has definitely been fulfilled. Most days there are surprising questions, thank goodness, such as the call from a woman asking what she should feed an injured wasp she had rescued from ants. And when a customer appears at the information desk saying, "Oh, I hate to bother you," I respond, "That's what I'm here for. That's my job! How may I help you?"

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³ Interview, Rowan County Public Library, May 4-8, 1998.

⁴ *Statistics & Directory of North Carolina Public Libraries July 1, 1996 - June 1997* (Raleigh: State Library of North Carolina, 1997).

⁵ Phone interviews took place between May 15 and June 3, 1998. I would like to acknowledge the assistance of Artemis Kares in making several of the calls.

⁶ Roma Harris, "Bibliographic Instruction in Public Libraries: A Question of Philosophy," *RQ* 29 (Fall 1989): 92-98.

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⁸ *Ibid.*, 94-97.

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¹¹ John N. Berry III, "Risking Relevant Reference Work," *Library Journal* 123 (May 15, 1998): 6.

¹² Trisha Gillis, "Librarian as Floorwalker, or Don't Point, Walk," *The U*N*A*B*A*S*H*E*D Librarian* 101 (1996): 19-20.

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