

Staffing for Reference in the 21st Century Charge:

The Reference Service and Staffing team will report on the current trends in staffing reference service within public and academic libraries with the focus on regional information needs in the next decade. Areas of inquiry will include staffing models, use of technology, and models of delivery. The team will report on patterns of staffing, and the usage and information needs of current users of the Carnegie Library of Pittsburgh and make recommendations for potential improvement.

Reference services and staffing at CLP in context:

Reference HASN'T changed: the "what" of reference service

Samuel Swett Green published the first article on helping patrons use the library in 1876. David Tyckoson in his article on best models of reference service translates Green's vision of reference service into four basic tasks. Reference staff:

- Instruct patrons how to use the library
- Answer patron queries
- Aid the patron in selecting resources
- Promote the library within the community.ⁱ

Over 130 years after Green's assessment and over 100 plus years of the Carnegie Library of Pittsburgh's existence, these four duties still pinpoint an accurate description of what the reference staff of a library do. It is important to keep this in mind as we look and respond to increasingly rapid shifts in the way people organize, use, and access information. Looking forward into the future as long as the public library exists, even in a virtual form, these basic components of reference service will by necessity also remain. It is our job to ensure that we are providing these services in the most efficient and effective way possible.

Reference HAS changed: the "how" of reference service

This isn't to say however that "how" we go about doing these things has stayed the same. Contrary to lore or popular opinion, reference services in both public and academic libraries have been and continue to be in a constant and intense state of change for over 15 years. CLP is certainly no exception to this. We've had a long history of strategically adapting to find ways to best meet the needs of the public. As formats, habits, skills, and technology has changed so has the library. As the pace of change has quickened so have our efforts. For 10 years the basis of change was the Internet and the exponential increase in the provision and availability of digital information and data; both free and fee based. For the past 5 years, the additional driver of change – and it has always been with us – has been public finances and the condition of local and state economies, the primary sources of public library fundingⁱⁱ.

The Internet's affect on reference –

The availability of digital resources had an almost immediate effect on almost all aspects of public services, permanently altering the patron/librarian relationship, how resources are used and acquired/maintained, and changing the community/library relationship. In assessing how these relationships have changed, we can also answer one of the most obvious and frequently asked question we hear - "why do we need libraries with the Internet?" The first answer is simply that we no longer get the questions with the easily found answers – the low-hanging fruit. The majority of people whether library users or not are very capable of

finding ‘good enough’ answers or data using conventional searches on Google, Yahoo or Bing. We get the questions that require a more complex approach whether in context or syntax, searches requiring knowledge of the deep web, and data review requiring more than rudimentary critical thinking skills.

Additionally the traditional expectation of library users is that library staff will have knowledge about the *contents and use of every item* located in the library building or department. This may seem outrageous when you consider the size of some of the collections in the larger locations but nonetheless it is the common assumption. Users expect library staff to be able to not only find items and information but also to evaluate the content, to tell them about it, to help determine its usefulness for their need and to instruct them on its use if necessary.

Further complicating the reference responsibility is the fact that the expectation of staff’s knowledge and ability to assist goes beyond just the items on the shelf. It extends to anything physically housed in the library. If Port Authority bus schedules are on a rack in the library then reference staff will be asked questions about bus routes. If tax forms are available in the library then staff will be asked tax questions. If copiers, computer equipment, assistive devices for the blind and physically handicapped are located in the library then staff will be asked how to operate them and in the case of the computer each and every software package on them.

Internet as collection

Let’s consider that “one” special item in the library - the public computer with internet access. The expectations of the users haven’t changed since public access to the internet was brought into the library. The logic of “if it’s in the library then you can help me with it” is still as strong as ever. But now instead of the large but at least finite and space restricted number of items located on the shelves and inside the physical location of a library, that one item - the internet accessed computer, has brought over 3 trillion and exponentially increasing pages into even the smallest and minimally staffed location. These pages often create some of the same types of questions we’ve had in the past but now more often than not we may be seeing the resource, site, or page for the very first time. We are expected to be able to look at a webpage or site, evaluate it, navigate it, figure out how it works and explain it to users as they discover it and ask about it. We are asked not to just provide data, but also instruction in how to use what is found, processes, meanings, or variations of the above, as well as assistance with online forms and applications.

Unfunded mandates and staff outsourcing to the Public Library

Reference service in the digital age means bridging the gaps between patron skills, patron needs, and the expectations of third party influences. Increasingly we are the access point and intermediaries of web-only resources of non-library information providers; unemployment claims, credit scores, loan, financial aid, and job applications, employment testing, and insurance claims. Although we may have fewer questions, they now take longer to analyze and satisfy.

A recent internal survey of branch libraries was conducted to come up with the names of agencies, organizations, and businesses that directly and indirectly refer their clients to the library to access their services. The list included over 75 agencies that we know of that direct their clients to our library in order to access and apply for their services, make appointments, apply for jobs, etc. In the past users would have contacted these agencies directly by phone or in person and would have been assisted by someone from that agency. Now those agencies direct their clients to us and library staff are expected to offer the assistance that normally would have been conducted by their staffs.

The Carnegie Library of Pittsburgh user

Carnegie Library serves a diverse and changing population. Users are drawn from the entire Pittsburgh Metropolitan Statistical Area (Allegheny, Armstrong, Beaver, Butler, Fayette, Washington, and Westmoreland counties,) as well as neighboring communities in WV and Ohio. It includes students from

the middle and high school levels through doctoral candidates; adult lifelong learners and new readers; recreational readers, adults interested in business and consumer issues, Internet users, and people seeking information related to their work. Materials are provided to the business, corporate, manufacturing, scientific and engineering communities, as well as the artistic and music communities.

The Reference and non-fiction collection provides for the informational, educational, and recreational needs of our users. It should be noted that 40% - 50% of our users – especially at Main Library - are students, the majority from the university and academic communities, resulting in an intelligent and informed user base with high expectations for service, content and flexible/instant provision of that content via digital means.

Regional Information Needs

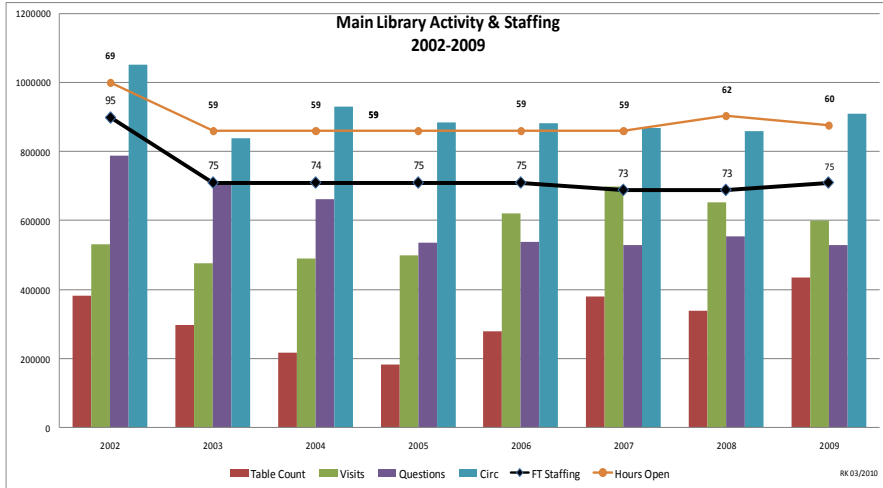
The Pittsburgh region has been benchmarked and rated against many other cities and on various criteria, winning several significant titles including Most Livable by both Forbes and The Economist. In 2009 the Pittsburgh region was named the 4th “Most Literate City” in the country. One of the criteria used for this ranking is library resources. CLP’s collections, locations, and numbers of professionally trained staff were all critical to this ranking. The economic impact of the library on the region has been well documented. The libraries role in the quality of life for the region is often considered and mentioned by residents but is not always quantifiable. The priorities of the region and the information needs that correspond to those priorities must frame the planning process of the library and determine its results and the library services that respond to those needs must be publicly articulated and marketed.

Besides the academic or educational user, the library as a whole is responding to several of the key needs apparent in the region. Workforce development, training and skills often times coupled with literacy. In some cases it’s the introduction to computer skills for those with no private access to a PC, for many others, especially those changing careers it is improving or enhancing their skills, especially with MS Office applications, and for others it is the library as classroom. Over the last 5 years we have seen a marked increase in the number of telecommuting students, many enrolled in area cyber-schools who are using both the library’s computers or its wireless access, and the wealth of resources in our collections. We also must plan for increased need and demand from Pittsburgh Public school students as the public schools continue to reduce the amount of their professional library staff and library resources.ⁱⁱⁱ

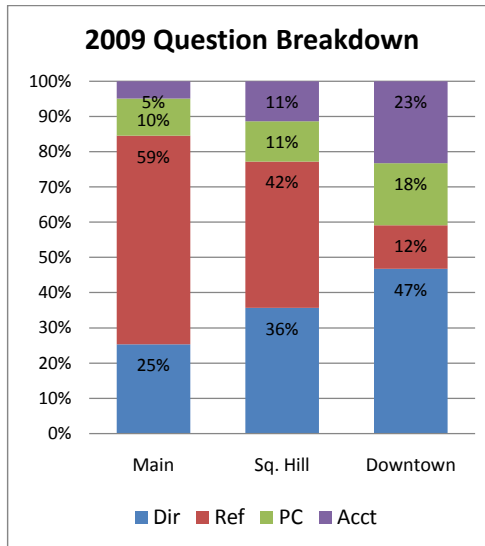
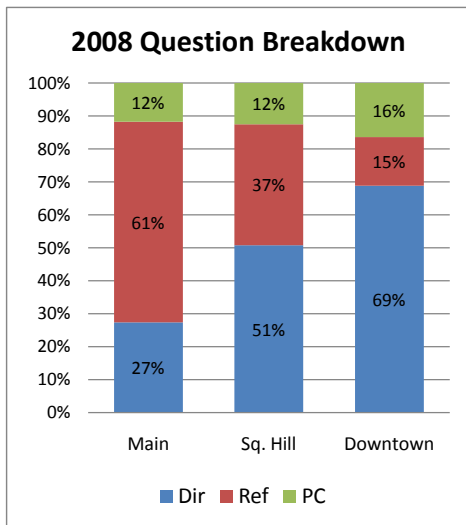
While the Pittsburgh region has one of the most educated professional work forces in the country^{iv}, there are wide-ranging problems with academic performance in the Pittsburgh Public Schools, significant among them the racial gap between black and white students.^v While commendable progress has been made in addressing and starting to close the gap, it is a long-term objective requiring community resources to supplement the school’s efforts.^{vi} This places an even greater emphasis and need for agencies like the library whose focus is on literacy and education.

CLP trends in Reference Usage

Customer use as reflected by statistics has remained fairly stable over the course of the past 5 years during periods of significant change at the library due to renovations, departmental consolidation, and budget issues. There is a correlation between staffing, hours and increases or decreases in other core library activities. It should also be noted that the closing of Schenley High School hasn’t adversely effected usage statistics, and many of these students still find their way to Main Library as destination.



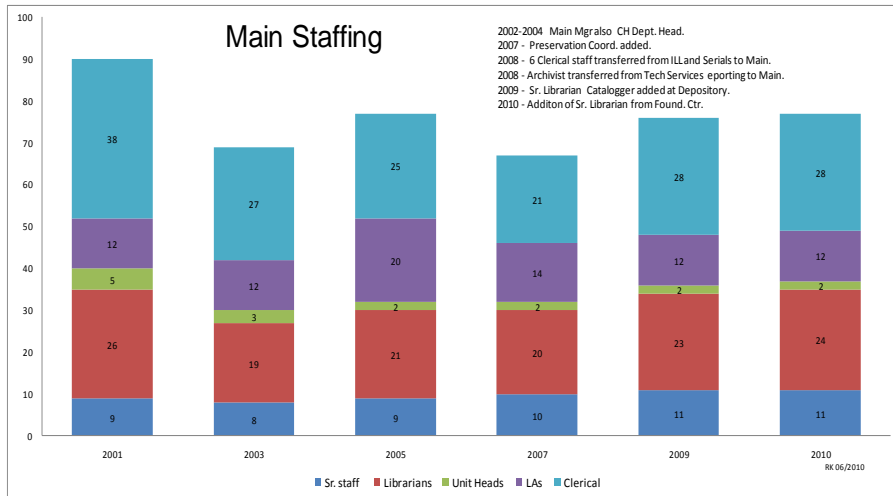
Further breakdowns of questions and use do indicate differences in how neighborhood locations are utilized compared to Main Library; the assumption and practice is that Main Library is the primary resource for research and subject knowledge expertise. This is borne out by the proportion of questions answered at Main that are classified as Reference as opposed to Directional, and the increase in room use as reflected by table count and the convenience of our wireless access. In a sense this is the near-perfect marriage of electronic and traditional resources utilizing both materials and space.



- Notes:
1. Main Library statistics are monthly, branch statistics are extrapolations based on detailed quarterly samples.
 2. Numbers used to derive percentages are totals for the given facility.
 3. Downtown Library has determined that a proportion of Directional should be allocated to the Reference column.

Reference Staffing Changes at CLP

From as many as 90 full-time staff in 2001, Main Library has seen staff reduced by as many as 20 positions as a result of attrition and the state budget cuts in 2003. In recent years the total number of full-time staff has increased somewhat by addressing the staffing tables, and primarily through the transfer of already existing roles and tasks from Technical Services to Main Library with the staff responsible for those roles.



What other libraries are doing – staffing service models in Academic and Public libraries

Library administrators, both public and academic are always looking for ways to improve service and maximize efficiency especially in light of budget cuts and elimination of staffing positions. Professional library journals and conferences highlight and promote any innovation that may prove to be the key to improved and less costly service. While we can report on some of the trends and highlight staffing models that have been adopted to varying degrees at other institutions it is very difficult to get any evaluative data on these practices. This is doubly true for public libraries that lack the requirement or time to publish or report on their staffing practices or procedures. While Academic library models can be looked to for inspiration most of their practices cannot be readily duplicated in public libraries as we serve a much broader population, mission, and set of user demands. We also do not benefit from the more extensive pool of affordable subsidized student labor that academic libraries can utilize, keeping their operating costs lower.

Tiered reference – This practice developed in academic libraries in the early 90's as a response to lower numbers of reference questions at the reference desks. The basic premise of this is that library assistants and other paraprofessionals cover the desks to answer most questions and more advanced questions are referred to subject specialists or librarians in the back office. Librarians then spend more time doing consultative or research reference by appointment, conducting training for customers and staff, doing outreach, marketing/planning, programming, etc.^{vii}

Single service access points – In academic libraries some libraries have combined the circulation desk with the information/reference desk. This is usually paired with the tiered system in that student trained information assistants then refer harder reference questions to librarians who come out from offices to help.

Remote access reference – A few libraries are offering more specialized reference service remotely through videoconferencing technology. In theory customers needing specialized knowledge and consultation could utilize the videoconferencing terminal (or their own equipment) at a remote location to work with an available reference specialist at another location. ^{viii}

Roving Reference/desk-less reference – This model of reference service avoids the passive approach to reference that requires the customer to come to the reference desk for assistance. In this model reference specialists approach customers and/or are available to them throughout the library. Wireless and handheld devices are important tools for this model of service.

What CLP has done – Major Reference re-structure at CLP

The 2000-2001 Strategic Assessment and Planning process took a critical look at the library's services, facilities, training and collections through both user and staff perspectives. Two of the key questions used to frame the analysis at the Main Library were:

1. Do existing services meet current & projected user demands and needs?
2. Does the facility support the needed service requirements?

Among the conclusions of this planning process was a decision to replace most of the existing adult subject departments with an Integrated Service Delivery model.

1. A consolidation of the major subject discipline depts.
2. Redistribution of the reference and circulating non-fiction collections into sequential call number order.
3. Transfer of almost all pre-1970 periodicals to an off-site depository and allow for 5 years of growth in the circulating and reference stack areas.

What were the anticipated benefits?

1. Less customer / user confusion.
2. Single point of service for non-specialized reference.
3. Reduction in overall staff costs.
4. Services and collections that more accurately reflect library use.
5. Enhance the value of the professional staff by providing training and experience that broadens their depth of knowledge.

Over a three year period CLP successfully merged the Humanities, Music & Art, Science & Technology, and Social Science departments into a single reference services unit on the second floor of Main Library. During that period, after a year of practical experience and an extensive review of reference questions, the library determined that the new Reference Services Dept. would retain Art as a subject area, but Music reference and its related collections needed to be a distinct entity within the library, and would be a more natural fit with the newly created Film & Audio Dept.

From a staff perspective, extensive training and staff swaps did much to alleviate fear of the unknown and encroachments on subject area comfort zones. Where the three separate subject departments had accounted for anywhere between 18-24 Librarians and 3 Department Heads (depending on the year,) Reference Services has been staffed with between 9-12 Librarians and a Manager. Government Documents and Patents are now the responsibility of one individual, rather than three, and services are provided at the desk, by telephone, through e-mail, Virtual Reference and (as of July 2010) via IM.

The creation of the First Floor provided for a new staff training approach and a revised staffing model relying on Library Assistants and a nascent expectation that FF would be a starting point for new professional staff, providing a consistent pattern of training and then feeding them into the overall system as needed. The selected Librarians on the FF are to provide guidance and convey their seasoning to a younger, inexperienced staff. FF staff are intensely involved in programming, proactive customer service and running the dynamic signage displays.

Service Models and use of technology at CLP

Beginning with the strategic emphasis on Customer Service back in 2002, the scope of services and the service models have undergone several changes at Main, along with concerted efforts to change how and where we meet our users.

First Floor has always used a modified roving component to keep staff circulating among the popular collections, making them both visible and available to the public. They are also responsible for shelving and arranging the popular room collections in order to both maintain a presence and knowledge of the collections.

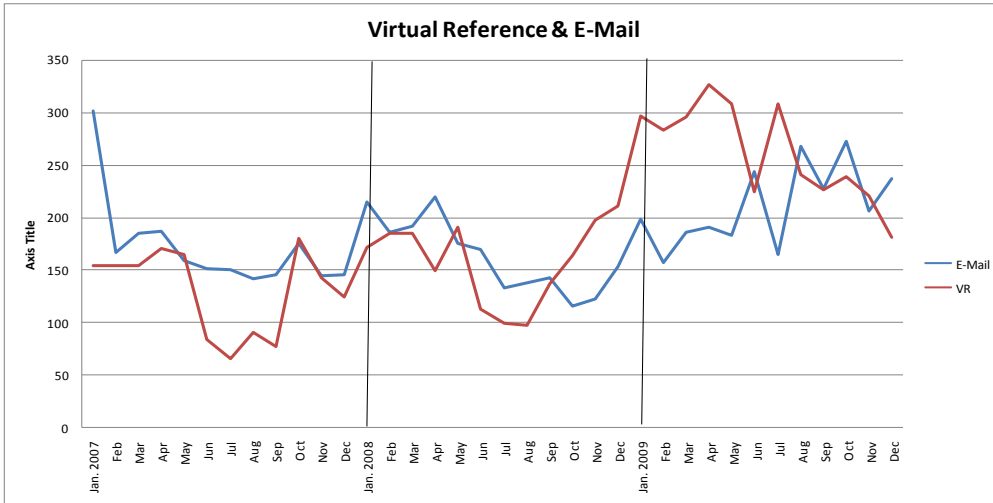
Both First Floor and Reference Services have tried using several hand-held devices, mini-notebooks PCs, and even an Apple I-Pod Touch in several efforts to roam and be available on the floor and in the stacks. These efforts weren't very successful for technological reasons and by virtue of customer habit/needs. Some of the devices (Samsung Q1 tablet) were too heavy as portable tools and didn't have an adjustable screen. The I-Pod Touch was a little better but most of the applications we would use don't have mobile resolution formats. The real issues for Reference are that with the provision of wireless access we find ourselves needing to help people on their PCs not on a hand-held one. In addition, the building is laid out in such a way that most users will have spoken to a librarian before going into the stacks. Our roving efforts and use of portable devices have had no quantifiable impact on staff efficiency.

Additionally CLP experimented with its own version of academic tiered service through a first floor help desk program. One barrier to fully exploring tiered service in public libraries is cost. Tiered reference service requires additional staff and is more cost efficient in universities and colleges because of the relatively affordable labor pool offered by student workers. Student workers at circulation and information desks can be paid minimum hourly wages and can be supported through work study programs. CLP was able to duplicate this efficiency by staffing the help desk with library school students from the University of Pittsburgh's MLIS program. This allowed for staffing by degreed students without paying a library assistant wage and further helped to reduce directional and informational questions at the reference desks. Evaluation of the program was favorable but even with the lower waged staff it was unfortunately the victim of budget cuts and high turnover.

Virtual Reference at CLP – Meeting the customer at their place

CLP continues to participate in state-of-the-art efforts at expanding its public service coverage, drawing in new library users and connecting with users on their terms who don't utilize the library as physical space. E-mail reference has been an integral part of library service here going back at least 10 years.

After a quasi-successful pilot of PA Librarian Live – an early virtual reference project in 2004, CLP became one of the driving forces and a lead library in the new statewide VR service, Ask Here PA, introduced in 2006. The use of VR and its full integration within the regular schedule (something not done in the pilot project,) has given us an avenue to serve CLP users where they are, at least virtually. VR use has steadily increased overall, though there are well defined patterns of busy and less busy use. AskHere PA is a statewide cooperative service, with an implied expectation that as a District Resource Center CLP will continue to assume a primary staffing function including national and international coverage as part of the 24/7 cooperative with other public and academic libraries. The statistical evidence indicates that the trend for both VR and 'traditional' e-mail reference use are increasing when taken as a whole.



Note: Does not include other department's e-mails. (PA, Music, Film & Audio.)

Staffing and Virtual Reference

VR and e-mail are both resource intensive services. VR sessions last anywhere from 5 to 20 minutes, and the follow-up, depending on how many questions are either referred to us or are in our queue, can take as much as 1-3 hours per day. Additional questions are also referred to either the PA or Music Depts., (with some to Business,) depending on their complexity and resources needed. Contrary to some notions, this is not an efficient means of handling reference questions, though it is an efficient way to provide many answers. E-mail questions also require in some instances as much as 20-30 minutes and may involve repeat or follow-up questions.

Text reference. In 2008 CLP conducted a six month pilot project using Meebo as a universal text reference (IM – Instant Messaging) medium. The six month test indicated that we had the right idea but using the wrong tool. Because Meebo is an anonymous aggregator, we saw that over 50% of the sessions were idle chat and boorish/rude comments. After reviewing the available tools and hoping that a free universal aggregator would become available, CLP has opted to add the Mosio text service as a public service option beginning in July, 2010. We anticipate that text reference content will largely follow the ready reference model and will include questions on hours, locations, item availability and reserves.

Staff qualifications and quality of service

We've looked over the various trends, technologies and staffing models that other libraries have attempted in the last ten to twenty years and found that CLP has made significant changes over that time period. We have found that despite those changes and myriad changes throughout CLP's history basic reference duties to the public have remained the same. We cannot speak to the duties of reference without touching upon the quality of the staff needed to perform those duties. The fact remains that it takes skilled, educated, and specially trained staff to deliver quality library service and collection management. The early leaders of the Carnegie Library of Pittsburgh recognized this by establishing an internal training school for librarians.^{ix} Today of course Masters of Library and Information Science programs like the University of Pittsburgh's now provide the foundational requirements for librarians. Education and skill development cannot stop with the attainment of the MLS/MLIS. Rapid technological changes and the variety of user demands requires that skill sets be assessed often for areas of deficiency and opportunities for development. Continuing education and training for both

professional and paraprofessional staff need to be an integral part of any successful reference staffing model but are unfortunately often seen as a luxury and maintained only during times of economic security.

Final thoughts and recommendations for the future

“Many new models have been proposed over the past two decades, and many others will be proposed in the future. These models receive attention in the professional literature precisely because they are innovative. However, the fact that they receive attention does not imply that they must be adopted. The needs of the community must remain foremost in the minds of reference librarians, who should not feel pressured to change models of service simply for the sake of change... Traditional reference service remains the predominant model in libraries today not because reference librarians lack initiative, are stubborn or resist change, but simply because that model still meets the needs of many communities that libraries serve.”^x

We agree that change for the sake of change should not be our guiding principle. Financial realities will continue to be a driver of change but any model of successful reference staffing needs to have quality service to the public as its primary mission. What constitutes “quality” can and should be debated especially in light of scarce public funding but the library should take the lead in defining, maintaining, and planning for the continuation of it into the future.

Comment [EIN1]: Added.

We recommend the following steps to help us do that.

- Improve qualitative data collection of user questions for assessment and planning.
- Reassessment of current job descriptions, competencies, accountabilities, and skills required for reference staff.
- System-wide coordination, oversight, and planning of reference service for efficiency, accountability, and consistency.
- Further exploration on the use of tiered reference service to match expertise with user need including the possibility of re-establishing a staffed help desk.
- Assessment and development of ongoing mandatory training program for reference skills to include staff at all locations.
- Robust professional development opportunities to stay abreast of trends and ideas from others in the library, information, technology, publishing and various subject fields.
- Assessment of technological infrastructure and support for reference service and initiatives including:
 - Wireless or VOIP telephone systems that allow for roaming service and customer contact, and allow for simultaneous management of telephone and data interfaces.
 - Wireless handheld devices for roaming service.
 - Video conferencing capabilities for remote and specialized reference service.
 - Centralized system-wide phone system to handle the majority of directional and account questions by the appropriate level of staff.
- Increased emphasis and ongoing development of reproducible, widely dispersed and technologically diverse bibliographic instruction including print and web-based self-service and guided reference tutorials.
- Frequent responsive environmental scans and strategic planning– the speed of change just keeps increasing and we have to be more nimble and adaptable. We need resources for quick assessment, planning, implementation and evaluation.
- “Smart” use of grants and special funding that supports operations and initiatives without diverting resources from core services.
- Exploration of potential partnerships and collaborations with corporate, governmental, and nonprofit agencies who rely on the library to provide public computers and assistance to their clients, customers, and current and potential employees in accessing their services and websites.

- Re-examination and continued evaluation of our information architecture to increase self-service and decrease directional and informational type questions.

ⁱ Tyckoson, David A. "What is the Best Model of Reference?" *Library Trends*, vol. 50, no. 2, Fall 2001.

ⁱⁱ Curzon, Susan Carol. "A survival guide to making the best choices when bad economic times mean cuts at your library". *Library Journal*, May 15, 2003.

ⁱⁱⁱ Rujumba, Karamagi. "School librarians losing jobs as city schools feel the pinch". *Pittsburgh Post-Gazette*, Saturday, May 01, 2010. <http://www.post-gazette.com/pg/10121/1054771-53.stm>

^{iv} Briem, Christopher. "Educational Attainment in the Pittsburgh Regional Workforce." *University of Pittsburgh's Center for Social and Urban Research's Pittsburgh Economic Quarterly* March 2010.

^v *Rand Corporation*. "Student Performance in the Pittsburgh Public Schools" <http://www.rand.org/pubs/drafts/2005/DRU3149.pdf>

^{vi} *Council of the Great City Schools*. "Focusing on Achievement in the Pittsburgh Public Schools" <http://www.cgcs.org/pdfs/Pittsburgh.pdf>

^{vii} Gardner, Susan. "Tiered Reference: The New landscape of the Frontlines." *Electronic Journal of Academic and Special Librarianship* v.7 no. 3 (Winter 2006).

^{viii} Ventura, Julie and Kathy Sanchez. "One OLIVE or Two". Presentation material from Reference Renaissance 2008 conference. http://www.bcr.org/referencerenaisance/2008/schedule_details.html#day1b

^{ix} Munn, Ralph. "Carnegie Library of Pittsburgh: History 1895-1969", 1970. Accessed 6/21/2010, <http://www.clpgh.org/research/pittsburgh/Carnegie/mrac2.html>

^x Tyckoson.