# REFERENCE SERVICES FOR REMOTE USERS[1]

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*The option of taking a course through distance education is becoming more and more common. When academic institutions start to offer the option of distance learning, this has an impact on the library and the services that it must continue to provide. The library is responsible for providing off-campus students with the same services that are provided to on-campus students, although these services might not always be provided in the same way. Although there are many library services that are affected by this, only reference services will be explored here, with a focus on electronic reference services. This paper will serve two functions: first, it will serve as a limited review of some of the literature related to reference services for remote users; second, it will look at some of the specific reference services offered to remote users by academic libraries. The paper concludes with a brief discussion of the challenges of providing reference services for remote users.*

## INTRODUCTION

An increasing number of institutions offering the option of taking courses or completing an entire degree through the method of distance education. One example of this is the Masters of Arts in Library Science degree at the University of Arizona. For the Masters of Arts in Library Science degree, 36 units are required, of which 24 units may be completed through virtual coursework—students only have to complete 12 units on campus ("Curriculum requirements for graduation," 1997). The library is responsible for providing off-campus students with the same services that are provided to on-campus students, although these services might not always be provided in the same way. Providing reference services to remote users will require the library profession to rethink the manner in which those services are provided.

The difficulties in developing programs for providing reference services, as well as other library services, for remote users is that additional funding, or worse, any involvement with or knowledge of the distance education programs are unavailable to the library.

> These [distance education] classes are often questioned by accreditation teams because they often lack access to library materials. Worse perhaps, many of these distant classes are established without any consideration of students' library needs, and often without the knowledge of the librarians on the main campus or at local libraries. (Pease & Power, 1994, p. 44)

In an examination of reference services to remote users, the services a student could receive by walking up to a reference desk in a library were of primary focus—i.e., asking reference questions ranging from ready reference to detailed research questions. This paper will serve two functions: first, it will serve as a review of some of the literature related to reference services for remote users; second, it will look at some of the specific reference services offered to remote users.

## REFERENCE SERVICES FOR REMOTE USERS

In 1988, a Task Force was appointed by the ALA to revise the 1981 "Guidelines for Extended Campus Library Services." It was decided that the guidelines should be revised,

> based on the following factors: non-traditional study becoming a more commonplace element in higher education; an increase in diversity of educational opportunities; an increase in the number of unique

environments where educational opportunities are offered; an increased recognition of the need for library resources and services at locations other than main campuses; an increased concern and demand for equitable services for all students in higher education, no matter where the "classroom" may be; a greater demand for library resources and services by faculty and staff at extended campus sites; and an increase in technological innovations in the transmittal of information and the delivery of courses. (Task Force, 1990, p. 354)

The Task Force continued to define "extended campus library services" as "those services offered in support of academic courses and programs offered away from the main campus of the institution responsible for the academic program" (Task Force, 1990, p. 354). As part of the "philosophy" statement, the Task Force affirmed that "[e]ffective and appropriate services for extended campus communities may differ from those services offered on campus. The requirements of academic programs should guide the library's responses to defined needs" (p. 354).

There is a significant amount of literature in the library and information science field dealing with libraries and their relationship with distance education, however, the majority deals with document services, access to the catalog, and circulation functions. Within this, there is a smaller, but still significant, amount of information on reference services to remote users.

Pease and Power (1994) make a seemingly simple, yet very important statement:

Quality service and equality with on-campus programs should distinguish off-campus library support, including reference service . . . The principles of good reference services are the same, whether to on-campus or off-campus, but major differences may exist in how reference work is executed. (p. 43)

There are several sources which list the priority of conducting reference service as follows: 1) the person in front of you; 2) the person on the telephone; 3) the person requesting service by e-mail, fax, mail, etc. (e.g., Bopp & Smith, 1995). These priorities will have to change when librarians are dealing with people that may never be right in front of them. The methods that are being used to offer reference services to remote users include the telephone (with some libraries providing a 1-800 number), fax, mail, e-mail, and web forms.

The Systems and Procedures Exchange Center (SPEC) of the Association of Research Libraries publishes 10 times a year SPEC Kits and Flyers on topics of current interest to librarians. They contain a 2 page summary of the current status of the topic which includes the results of an ARL membership survey on that topic. ARL has recently published two SPEC Kits dealing with distance education and services to remote users: *SPEC Kit 191: Providing Public Services to Remote Users*, and *SPEC Kit 216: Role of Libraries in Distance Education*. The survey for SPEC Kit 191 received 75 responses. In response to whether or not the libraries provided reference services, excluding telephone:

Forty-six libraries (64%) indicated that reference service is provided to RAPS [remote access patrons]. According to the survey responses, (46 respondents) electronic mail is offered by virtually all of them. Mediated literature searching is offered to RAPS by 33 libraries (46%). Seventy per cent of the libraries offering mediated searching, offer electronic mail as one option for placing a search request. Sixteen libraries (48%) indicated that search results can be faxed, and 17 libraries (51%) reported that search results can be sent via electronic mail (ARL, 1993).

For SPEC Kit 216 (ARL, 1996), the response of 46 respondents to the following survey question, "Does your library provide any of the following Reference Services to distance education students?" was:

- 34 Telephone
- 36 E-mail
- 27 Scheduled "one-on-one"
- 15 World Wide Web
- 7 Other (please specify):
  - 1 Comments function on OPAC
  - 1 FAX
  - 1 E-mail to liaison librarians and reference service
  - 2 US Mail (p. 9)

An informal survey was conducted of Association of Research Libraries member libraries to see how many offered remote reference services to their patrons and what kind of services were offered. Web pages of member libraries were examined to determine whether or not reference questions could be asked by remote patrons.[2] If the service was offered but not advertised on the institution's web page, then their service was not included in this count. Also, a comprehensive search of each libraries' page was not conducted but rather the Reference/Information Services section, or at anything that looked likely from the top level, was investigated.

In the survey, subject guides, databases, lists of FAQs, or reference by telephone was not counted.

Of the 120 ARL libraries, ten are not academic libraries, one was entirely in French (Université Laval), and eight of the URLs listed did not work after several attempts. Of the remaining 101 libraries, 66 (65%) provided remote reference services of some kind and 7 (7%) mentioned distance education on their web page.

Of the 66 that provided remote reference services, 30 did so by e-mail, 31 by web forms, 4 of those by both, one had a conferencing system as well as e-mail, and there were 10 which mentioned other means of service (6 offered some kind of reference service, but only to their own patrons; one answered through their OPAC; one through the campus computer system; and two specifically mentioned that they served distance education students but did not mention how). Most of the e-mail and web form services stated that they would only answer, "brief, factual questions," "quick reference questions," "short answer questions," or "simple, factual questions." A few of the pages acknowledged that they would accept more in-depth questions. The University of Kentucky also had a web form where a literature search could be requested. The University of North Carolina, Chapel Hill asked on the web form if the user has physical access to the library. This question is valuable if the library then offers more remote services to patrons who do not have physical access to the library.

At the University of Oklahoma, the School of Library and Information Studies (SLIS) and the Library and Information Research Center (LIRC) developed a project for providing off-campus library services to distant students. These units were in turn approached by three different programs: Independent Study department, Bachelor of Liberal Studies Program, and the National University Degree Consortium. The reason for the interest of the different programs were concerns about accreditation and requests from students. The service providers for the distance education students are,

> graduate students in the M.L.I.S. program. Providers will have successfully completed LIS 5013, Information Resources and Services, a course which covers basic reference services. Providers will have an understanding of adult and distance learners, superior communication and question negotiation skills, training in information technologies and telecommunications, and the ability to navigate and function within library, educational, and administrative networks. (Harrington & Spindle, 1993, p. 8)

SLIS and the LIRC also developed a list of task and responsibilities for the service development:

- Develop specifications
- Gather descriptive data on learners
- Determine information needs
- Investigate service limitations
- Develop service guidelines
- Develop cost and pricing structure
- Develop administrative procedures
- Plan library orientation
- Prepare information packet for remote access to library OPAC, and local BBS, communication channels for service
- Establish and maintain contact with students through phone, letters, BBS
- Provide information services
- Connect users with local information sources
- Follow-up on information provided
- Conduct formative evaluation
- Analyze results of evaluation
- Revise service procedures and implement (Harrington & Spindle, 1993, p. 91)

The goal of the off campus services project is to:

- Assist distance learners to locate specific materials.
- Assist users [to] identify resources close to the learner's home.
- Develop search strategies with learners.
- Provide inter-library loan assistance and document delivery within copyright limitations.
- Help users define information needs.
- Provide orientation/instruction in information technology and telecommunications.
- Assess learner library and technology use patterns and effectiveness. (Harrington & Spindle, 1993, p. 92)

This program of providing reference services to the distance education students at the University of Oklahoma is obviously very developed. There are several reasons for this, including the genuine involvement of the library and the different departments offering the distance education programs. It was probably beneficial to be able to have the library school and its resources available to the library for its program. Unfortunately, most libraries can not count on graduate students that have been trained in reference to help decrease the already heavy workload of the librarians in dealing with reference services to remote users.

The Massachusetts Institute of Technology (MIT) offers a service for remote users of the MIT Libraries called OWL (On-line With Libraries). It is accessible

only through the institution's computer network, Athena, with a valid account, including a personal password. This allows the system to be accessible only to members of the MIT community. When a user signs on to OWL, he or she sees the following message:

> OWL is an online reference service that provides assistance with questions related to coursework, research, or work being done at MIT and is open to the MIT community only. Your question will receive an answer as soon as possible, and no later than 5 PM on the next business day.

Patrons are allowed the option of seeing a list of frequently asked questions, or asking their own question. Patrons are prompted to type a one-word topic for their question, which corresponds to the different subject areas of the libraries.

Reference librarians who answer the questions asked on OWL are provided with training and a very detailed, step-by-step manual. One of the innovative aspects of OWL is that it is possible for the answer to be sent directly to the user if he/she is still logged on, otherwise the answer is sent to the user via e-mail. Another interesting aspect is that all of the librarians can see all of the questions, not just those that are for their specific subject area. All of the questions are placed in a queue where a librarian can select a question to answer. The status of the question changes as it goes through the system to show whether it is being worked on and whether or not the patron has received the answer. Having the system open to all librarians acts as a check on the librarians, provides an opportunity to learn from their colleagues, and an easy way of monitoring the service to ensure that it is being performed efficiently.

A flyer entitled "Library Services to UNL [University of Nebraska-Lincoln] Distance Education Students," describes the services that liaison librarians provide for remote users:

> Within the University Libraries, liaison librarians are assigned to work with academic departments. The liaison librarian responsible for your subject area provides instruction in various electronic resources and traditional reference materials. The liaison librarian can help you identify sources for your research and assist you in starting your research. Your liaison librarian can also conduct a computer search upon request. By accessing remote online databases, the librarian retrieves titles of journal articles and other citations, and sometimes also abstracts, on the topic of your choice. There are costs involved with a librarian-assisted search, depending on the databases searched. General reference

service is also available via: infomail@unllib.unl.edu. This e-mail address is checked twice a day, Monday-Friday. Responses will generally be sent within 24-48 hours. (ARL, 1996, p. 49)

The flyer for USTUDY (University of Saskatchewan Off-Campus Library Services) describes references services as one of the three main components of their Off-Campus Library Services. They provide, "factual and bibliographical information, book reviews, instructions on how to set up footnotes and bibliographies, library orientation and other library services" (ARL, 1996, p. 55).

In the appendixes are included the Electronic Reference Policy from the Emory University General Libraries (Appendix A), and the webform from the University of North Carolina, Chapel Hill (Appendix B). The Electronic Reference Policy is just one example among many of the tendency towards quick reference-only service for users of these new electronic services, be they e-mail or webforms. The webform from the University of North Carolina, Chapel Hill was also selected as an example because of its uniqueness. It asks whether or not the user has physical access to the libraries, which implies that the librarians will take that into consideration when responding to the reference questions, although the form states that "[t]his service is ideal for answers to brief factual questions, questions about the library's holdings, and questions concerning library services and procedures" ("Ask a reference question," 1996).

## CONCLUSION

Through this elementary exploration into reference services for remote users, many interesting aspects of these services have been illustrated. There are many elements that must be taken into consideration when dealing with remote users that stem from their being remote. Since video technology has not yet been developed extensively enough to be used for remote reference service, reference librarians must learn to deal with having no visual clues during question negotiation. In fact, with most questions being asked via e-mail or web forms, there are no audio clues either, and often no question negotiation at all. In addition, Pease and Power (1994) point out that,

> [i]t is easier to demonstrate the use of a reference resource than to explain it either in writing or over the telephone. Extension librarians, however, must rely mainly on written or verbal explanations.

Because of this the reference contact with an off-campus student may be lengthy and more in depth than many contacts at the reference desk. (p. 49)

They continue to hope that,

Perhaps off-campus reference librarians, toiling for years to enhance communication with distant learners can make an important contribution toward distinguishing when reference can be effectively delivered by a computer, and when personal, human interaction is critical for effective reference communication. (p. 58)

Technology in general, and computers in particular, are very important for providing reference services to remote users in most cases. However, it is important to remember that remote users will be accessing the library with a whole range of different equipment, as well as a wide range of knowledge and computer literacy:

"Some learners will have moderate to high levels of computer literacy, but only limited levels can be assumed" (Harrington & Spindle, 1993, p. 85). Wielhorski (1994) urges that "[i]t is critical that library instruction staff work closely and cooperatively with the campus computer center in order to provide support services to remote users" (p. 10). She goes on to emphasize that "[t]he library should define its role in respect to training remote users. That role should not be developed in isolation from the campus computing center" (p. 16).

Providing reference services for remote users is a challenge. It will force the library profession to question the way in which reference service is provided as well as force us to take creative advantage of new technologies. "[W]e should also welcome the opportunity to rethink our attitudes and our perspectives in order to reinvent our services in this new electronic environment" (Wielhorski, 1994, p. 18).

# APPENDIX A

## Electronic Reference Policy
Emory University General Libraries

### Reference Information, Consulting and Instruction

The General Libraries Reference Department provides electronic reference service to anyone submitting a question. Limits on this service are defined by the length and nature of the query as well as the resources available to staff in answering the question. In many instances, the resources available will be determined by the affiliation of the correspondent.

### Length of the Query

Electronic reference service is limited to the submission of no more than five short-answer factual items per query per day per person. As in all reference transactions the source of the information must be cited.

### Nature of the Query

The Reference Department of the R. W. Woodruff Library makes the distinction between reference service and research support. Reference service encompasses short-answer factual information and guidance about strategies or sources of information. As part of an academic institution we are committed to our role in the educational process and to teaching library use skills whenever possible; our goal is to help people with their own research efforts. Research support is appropriately the business of information brokers and research assistants who are paid to make reliable evaluative judgments for their patrons regarding the content of the information provided.

### Nature of the Response

The level of depth in answers provided will in part be determined by the affiliation of the correspondent.

Please see the telephone reference policy for categories of affiliates. Non-affiliates requesting e-mail assistance will be subject to the same restrictions applied to in-person and telephone reference service. Site-licensing restrictions on databases and their software will limit our use of these sources in answering e-mail questions to currently enrolled students, faculty and staff.

Site licensing restrictions on electronic reference products and the number of available workstations limit access and use to currently enrolled students, faculty and staff. In the interests of efficiency, reference staff may use electronic reference sources in providing e-mail information to non-affiliates so long as there is an equivalent paper source in our collection. The rationale for this is that non-affiliates have access to the paper sources in our collection, but it would be labor intensive for us to use them for e-mail reference. OCLC, RLIN, LEXIS/NEXIS and community catalogs may not be used to answer e-mail reference questions for non-affiliates unless the staff member needs to verify a bibliographic citation in order to answer the original question.

In instances where user affiliation prevents us from providing answers, the situation should be kindly explained to the user. Aspects of how the library works, current trends in information access, tools that might be of future benefit to the patron— each of these are opportunities to teach the patron something useful about the information environment and to implement our philosophical commitment to user education and empowerment.

## APPENDIX B

**Ask a Reference Question Webform**
University of North Carolina — Chapel Hill Libraries

## NOTES

1  Remote users do not have to be physically distant from the library.  They can include students who can not make it physically to the library for other reasons, or can not make it to the library except in the evening or during the weekend when reference services are not provided.

2  Accessed via the ARL member listing page at http://arl.cni.org/members.html

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