

The Second Half of Reference: An Analysis of Point-of-Need Roving Reference Questions

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At the University of Mississippi, a limited roving reference program was initiated in September of 2011 in order to extend reference service. More students, faculty, and visitors were congregating at the second floor entrance because of the installation of a Starbucks coffee shop. This increase in traffic flow on the second floor meant many patrons were visiting the library but never walking past the reference desk, located on the first floor. In addition, more technology had been added on the second floor. The library had also eliminated a service point and relocated some heavily used materials. Because the reference librarians were getting stopped more often in the hallways and were observing more students asking questions on the second floor, they instituted a limited roving reference program to help patrons on the second and third floors of the library building. With the help of an iPad, and after a period of experimentation, roving librarians now use two stations in large study areas and walk through the entire library during the busiest hours of the day.

This analysis studied 130 roving reference questions collected over an academic year, focusing on the questions that required expert help and comparing them to traditional reference desk questions. Although the hours of operation for the roving reference program are small and the questions are considerably fewer than those at the main reference desk, analyzing the questions answered through roving reference is useful for several reasons. This analysis gives academic reference librarians who have a roving reference program, or who are considering starting one,

a better sense of the kinds of questions, the range of questions, and the problems created by the questions in roving reference. Understanding the kinds of questions received by roving librarians can help design more effective roving reference programs.

Further, this analysis is one step toward deepening our understanding of reference interactions beyond the kinds of questions received through traditional reference services. A careful look at roving reference questions will advise librarians to think in terms of scaffolded reference as well as tiered reference. While reference librarians have always known that a one-stop consultation was not the beginning and end of a student's research process, this analysis indicates just how varied and complex a student's library needs are. The questions reveal that roving reference offers the ability to complete the "second half" of reference transactions by continuing to support students as they move to unknown or complex parts of their research. The analysis shows how roving reference provides integrated, scaffolded reference and research support, rather than a simple expansion of service.

Literature Review

Roving reference takes many forms; it might be roaming, incidental, remote, extended, or outpost reference. Each form is created to meet a particular need of academic patrons, even outside of the library building, and they may have additional characteristics, such as active or passive approaches to patrons. The two most common types are 1) moving about in the library but away from the static reference desk,¹

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and 2) offering reference in another building on campus.² However, what is true of all roving reference programs is that they succeed because they are specific to each institution as “niche” reference of a sort. Generally a problem presents itself that can be at least partially solved by roving reference, such as a library move or a group of patrons whose needs are not met at the traditional reference desk. For instance, Megan Dempsey describes a reference model that resulted from increased enrollment and fewer library staff: roving reference was integrated into a new reference model which assigned “on-call” status to librarians who roved and answered chat questions during their shifts, shifting directional and informational questions to the check-out desk staff.³

Several articles about roving reference in the library building list the benefits: reaching shy or reticent patrons and giving individualized and hands-on instruction at the point of need.⁴ Eileen Kramer reports that roving reference answered a significant number of questions that would not have been asked at the desk, although her research was undertaken in 1994 when students were working at dedicated OPAC and database computer terminals.⁵ She concludes that roving reference “reaches more students” and “produced both more sophisticated and more thorough service than its conventional counterpart.”⁶ Katherine Penner describes a similar problem in a recent article, where she sees students reluctant to come to the reference desk because of physical or space limitations. Penner also mentions that students feel anxiety about using the library and that roving reference is one more proactive way to adapt to our patrons’ needs.⁷ While most of the roving reference programs described in the literature are initiated by librarians’ perceptions of students needs, Anne Cooper Moore and Kimberly Wells surveyed students using the information commons at University of Massachusetts-Amherst and found that students wanted a library staff presence, such as a roving librarian, for assistance in the library.⁸

A significant portion of literature about roving reference has focused on the implementation of roving reference programs. This emphasis is understandable because of the many logistical problems in starting and maintaining a roving reference program. Questions that have been addressed include how and when to approach patrons, what kind of badge or identification to wear, and how not to look like one is policing

the library while roving.⁹ Among the issues discussed with in-library roving reference programs are staffing, schedules, marketing, and signage. Michael Smith and Barbara Pietraszewski report a number of staffing and scheduling problems, including resistance from some of the reference librarians.¹⁰ Technology is a major concern, as well. Some of the literature on roving reference focuses solely on the technology needed to make roving reference effective or efficient.¹¹ Roving reference has always relied on technology to increase the reach and depth of what librarians can do away from the reference desk, starting with phones and PDAs and now using tablets and cell phones. However, Kealin McCabe and James MacDonald note that after significant struggles and experimentation with mobile technology, it was the locational factor, not the specific technology, that made their roaming reference program successful.¹²

The research on roving reference thus reflects the broadly defined nature of these programs and the concomitant problems of managing these particularized, flexible, and experimental programs. However, within the larger scope of reference services, roving reference is often lumped into the problems related to declining numbers at the reference desk and the need to remain relevant as students do more and more research online and away from the library building. Susan Swords Steffan mentions roving reference as one possible way to redefine library services as information literacy instruction, thus moving librarians further away from the reference desk in order to improve interactions with students.¹³ Brian Matthews describes how reference services need to be preemptive, which means actively seeking students in those online and remote locations.¹⁴ The present study of roving reference questions can contribute to this literature by defining how roving reference is similar to but different from traditional desk reference or virtual or chat reference.

Methodology and Data Collection

Roving reference at the J. D. Williams Library at the University of Mississippi is part of a larger reference program which includes a traditional face-to-face reference desk and chat service, as well as phone and email reference. The reference desk is busy enough to prohibit roaming or roving during desk shifts (a problem noted by McCabe and MacDonald¹⁵). In addition some subject librarians conduct remote refer-

ence outside of the library and facilitate tutor training at the writing center and the athletic center. Roving librarians are also instructional librarians and subject specialists, giving them a wide range of research skills at all levels. The roving reference program in this analysis was limited to inside the library building and only during the busiest times over the lunch hour, for a maximum of 8 hours a week (or about 12% of overall staffed reference hours). Our reference department initially considered roving as a supplemental reference and an extension of the regular desk hours which extend from 9 a.m. to 9 p.m. most days.

This analysis studied 130 roving reference questions collected over an academic year. Roving librarians were asked to record all the questions they were asked. They were collected by four librarians in a reference question database. They did not collect information about patrons, such as gender or status (graduate or undergraduate), but a large proportion of the questions were from undergraduates. They also did not collect information about the location where the questions were asked, but the end location was often recorded (“escorted students to the correct shelf”). The total number represents a tiny percentage of the overall number of reference questions asked at our reference desk, over the phone and email, or on our chat service. However, some of the questions represent categories of questions that are not asked at the reference desk, indicating that our patrons have needs beyond our traditional reference formats.

Most analyses of reference question use categories that identify the complexity of answers, not the place of the questions in the research process for users. In contrast, this analysis looks more at the usefulness of intervention or mediation of the librarian during research processes: questions that indicate where students encounter obstacles at the library, after initial library instruction or reference desk help, and that were better answered in a different part of the library.

Results

Roving reference questions were coded first into five categories (see Table 1). Reference category questions were those that were research-related or concerned library materials, such as “How do I find copies of *Newsweek*?” Printing and copying category questions were strictly about mechanical matters. Directional category questions were not related to research, such as “Where are the instruction classrooms?” Miscellaneous questions were those that didn’t fit into any pattern, such as “Is that an iPad?” Finally, computer questions were those only about software or hardware problems not related to research, such as creating email attachments or rebooting computers. These categories reflect similar kinds of questions collected at the reference desk, in similar proportions, with more directional and printing questions than reference questions.

Type	N = 130
Reference	55 (42%)
Printing or copying	31 (24%)
Directional, not research-related	27 (21%)
Miscellaneous	10 (8%)
Computer	7 (5%)

The 55 reference questions were further coded into three categories that reflect the unique nature of roving reference (see Table 2). The largest category was research-related questions arising from a specific location and related to a book, journal, or DVD that the patron had detailed information about (known materials), most often occurring in the stacks. These questions came from students who had accomplished the first steps in finding the materials they needed but couldn’t complete the process. Often they were frustrated and had additional questions, but were too far

Type	N = 55
Locational questions about known, specific library materials—needing detailed assistance and with additional questions	31 (56%)
Locational questions about a type of library material—needing detailed research assistance at a library location	12 (22%)
Research questions needing a comprehensive answer, not location-based	12 (22%)

from the reference desk to ask. Even if they attempted to use the chat service from their cell phones or tablets, their questions required a librarian at their location, often to explain the LC call number system, to help locate a book that was not shelved correctly, or to find out what to do next. While we initially would have lumped these questions into a directional category, during roving reference we found that our role was more than directional. We were reducing library anxiety, answering follow-up questions, and encouraging use of the print collection, as well as having productive research consultations with students. Many of these questions were the “second-half” of the reference interview, where librarians continued what students had learned from instruction sessions or from working with a librarian at the reference desk.

The second largest category was location-based questions, but not questions about a specific library resource. These were also remarkable for being “second-half” questions, although less formalized or articulated by the students. For instance, one student realized he needed a current periodical and found the correct room, but did not know how to locate journals in his field without a title or knowledge of LC call numbers. After finding out more from the student, the roving librarian explained how “current” the current periodicals were, how to expand his search to recent but not current periodicals, how find specific journal titles, and simpler matters such as locations of reshelving carts for his rejected journals.

The third and smaller category was research-related questions that needed comprehensive answers, such as “How do I find articles about the history of sweet potatoes?” These were location-based questions only in the sense that the roving librarian happened to be the first librarian the student encountered. For students who are not experienced with larger libraries and would not know to look for a reference desk, the roving program provided both the first second halves of the reference interaction. However, these questions turn into fuller reference answers than is possible at the reference desk, because the roving librarian could help the student navigate online resources and then either accompany the student to find print sources or follow up with the student in a few minutes to offer more help.

Discussion

This analysis of roving reference questions focuses on the complex questions that required, or were im-

proved by, expert help “on location” in the library. Most roving questions are directional questions, but other questions are clearly the second half of the information-seeking problem, where students needed additional, specific help or didn’t realize they were going to need help until they were confronted with more problems. Some of these “second-half” questions were straightforward and more or less correctional or directional, but others were interpretive, requiring discussion, demonstration, and support of new library information and skills. The analysis of questions shows how roving reference is not the reference desk in motion or the reference desk with temporary locations. Roving reference provides a different kind of reference and research support.

However, the numbers do not fully explain the nature of roving reference or the nature of questions that our patrons have away from the reference desk or why some questions can’t be fully answered at the reference desk. The second chance to get help at the location of the question is, in fact, better than an extended reference consultation because it happens in context and at the point of need. In some libraries, the librarian at the reference desk may be able to accompany the student to the location where help is needed, but often the librarian is too busy. Even at slow times, it’s difficult to predict how long a librarian might be away from the desk when helping students in other parts of the library, creating a gap in desk reference. The roving reference program, not being tied to a coverage model of reference, supports the nature of library research where students need to rehearse, get close to, or approximate the activity—and then get help when needed. It promotes students’ development as researchers with a safety net to reduce frustration and anxiety. This supportive method is often called scaffolding, a concept commonly used in instructional settings to describe structured, individualized, but minimal help as a student learns to solve problems more and more independently.¹⁶

Here is an example of a roving reference interaction which supported a student’s attempt to complete a research process: A student in the current periodicals room needed a print source and had been directed to the current periodicals room by her professor. She knew she needed periodicals in her field of criminal justice and found the correct location in the library, but she wasn’t sure about what to do next. She approached the roving librarian on the second floor.

The roving librarian explained the catalog, the LC call number system, and the difference between current and older periodicals, which we shelve with the books. There was no simple way to do her assignment. She had to think through the assignment more clearly in the context of the materials she was sent to find, which was possible by browsing and looking at models at that location. The roving librarian checked in with her before she left, and the student said she had found what she needed, but she had more questions: how to copy what she had found. The librarian discussed how to use the copy machines and mentioned scanning and emailing the pages. If the student had been simply sent to the reference desk, she would have gotten a verbal description of how to do the searching and then been working alone to interpret the instructions and to finish the assignment. She also would have walked downstairs and then back upstairs twice to get more help.

Another typical “second-half” question arises in the stacks, where roving librarians find students looking for books. Some have the wrong call number; some find the correct shelf but the book is missing; some are in the wrong part of the library; others are just getting frustrated at how long it takes to find a book. These questions could be categorized as “locational” but further study suggests that the various kinds of questions that arise in the stacks are the result of different problems. Having the wrong call number is a problem of reading a catalog entry inaccurately or incompletely or not knowing about texting the call number to a cell phone. Students who are new to LC call numbers often don’t believe that they need the entire string of letters and numbers. Other students who have found their way to the correct location are stymied by the problem of what to do when the book isn’t there (something we rarely cover in library instruction classes or at the reference desk). Exhaustion and frustration with the library and with research, which get exacerbated when students aren’t sure they are looking in the right place, are avoidable problems if a librarian shows up to help and encourage them.

Limitations and Further Research

Some of the limitations of this analysis include the small number of questions gathered. Librarians with roving reference programs need to continue to gather questions from patrons to look further for patterns in these “second half” questions and to find out whether

questions within this category break down into other sub-categories of types. Studying more variables about roving reference questions could lead to further insights about the nature of patron problems within the library. Are the questions related to specific assignments and do they center around specific places in the library or are they caused by certain assignments? A comparison of in-library roving questions with questions asked during roving reference outside of the library could explain whether patron problems present themselves differently in different parts of the building. Evaluating the effectiveness of roving reference answers by surveying students afterward and studying the relative approachability of roving librarians could show interesting connections between reference desk and the roving reference questions. Additionally, analyzing chat and email questions for similar research process and location-based features, similar to the “second-half” questions in this analysis, could yield helpful findings.

Given the importance of physical locations and roving reference questions, studying more precisely the location and timing of roving questions could lead to more effective roving, by understanding where certain kinds of questions are likely to occur and when. More precise information about roving reference could help to develop a more nuanced philosophy of location-based reference. Understanding the problems caused by spatial organization in libraries can tell librarians how to use spatial relations in library instruction and in answering reference questions, both during roving and at the desk.

Conclusion

Traditional academic reference desk programs do a superb job of assisting students and faculty with research problems. Yet we know that students often walk away from the desk with a limited ability to find the materials they need: our reference conversations are one-shot sessions with “get them as far as possible” answers, when most information-seeking is a dynamic, recursive, unpredictable, and developmental process. Roving reference, on the other hand, offers the ability to complete the second half of reference transactions with continued support and information as the student moves to an unknown or more complex part of their research. This integration of reference assistance into a student’s research process makes it a much richer, vital part of an overall reference depart-

ment, and not tied to mobile technology, although considerably enhanced by it.

Roving reference programs are usually initiated when librarians are faced with changes in enrollments, staffing, and technology, but this analysis shows ongoing needs from students related to location-related research questions that have nothing to do with how many questions arrive at the reference desk. Roving reference is better thought of and classified as a different kind of reference that is not available at the static reference desk. With this analysis of questions, roving reference can be re-envisioned as more than supplemental, as we called it at the University of Mississippi. Instead, roving reference is an embedded, integrated reference, which fulfills a different set of needs from our patrons.

Notes

1. Katherine Penner, "Mobile Technologies and Roving Reference." *Public Services Quarterly* 7, no. 1/2 (January 2011): 27-33; Holly Hibner, "The Wireless Librarian: Using Tablet PCs for Ultimate Reference and Customer Service: A Case Study." *Library Hi Tech News* 22, no. 5 (2005): 19-22.
2. Lisa Lavoie, "Roving Librarians: Taking it to the Streets." *Urban Library Journal* 15, no. 1 (2008): 1-5; Joanna Gadsby and Shu Qian, "Using an iPad to Redefine Roving Reference Service in an Academic Library." *Library Hi-Tech News* 29, no. 4 (2012): 1-5.
3. Megan Dempsey, "Blending the Trends: A Holistic Approach to Reference Services." *Public Services Quarterly* 7, no. 1/2 (2011): 3-17.
4. Jennii L. Ramirez, "Reference Rover: The Hesitant Patron's Best Friend." *College & Research Libraries News* 55, no. 6 (1994): 354; Michael Lorenzen, "Management by Wandering Around: Reference Roving and Quality Reference Service." *Reference Librarian* 28, no. 59 (October 1997): 51.
5. Eileen H. Kramer, "Why Roving Reference: A Case Study in a Small Academic Library." *Reference Services Review* 24, no. 3 (1996): 67.
6. *Ibid.*, 78.
7. Katherine Penner, "Mobile Technologies and Roving Reference." *Public Services Quarterly* 7, no. 1/2 (January 2011): 32.
8. Anne Cooper Moore and Kimberly A. Wells, "Connecting 24/5 to Millennials: Providing Academic Support Services from a Learning Commons." *Journal of Academic Librarianship* 35, no. 1 (2009): 81.
9. Martin Courtois and Maira Liriano, "Tips for roving reference." *College & Research Libraries News* 61, no. 4 (April 2000): 289; Penner, "Mobile Technologies".
10. Michael M. Smith and Barbara A. Pietraszewski, "Enabling the Roving Reference Librarian: Wireless Access with Tablet PCs." *Reference Services Review* 32, no. 3 (2004): 249-255.
11. Katharine Widdows, "Mobile Technology for Mobile Staff: Roving Enquiry Support." *Multimedia Information & Technology* 37, no. 2 (2011): 12-15.
12. Kealin M. McCabe and James R.W. MacDonald. "Roaming Reference: Reinvigorating Reference through Point of Need Service." *Partnership: The Canadian Journal Of Library & Information Practice & Research* 6, no. 2 (2011): 14.
13. Susan Swords Steffan, "Through the Information Literacy Lens: Managing the College Library in the Twenty-First Century." In *Defining Relevancy: Managing the New Academic Library*, ed. Janet McNeil Hurlbert (Westport, CT: Libraries Unlimited, 2008), 122.
14. Brian Matthews, "Preemptive Reference: Coming out from Behind the Desk." In *The Desk and Beyond: Next Generation Reference Services*, ed. Sarah K. Steiner and M. Leslie Madden (Chicago: ACRL, 2008), 92-93.
15. *Ibid.*
16. Karen Bordonaro and Gillian Richardson, "Scaffolding and Reflection in Course-Integrated Library Instruction." *Journal of Academic Librarianship* 30, no. 5 (2004): 391-401; Nicholas Schiller, "A Portal to Student Learning: What Instruction Librarians can Learn from Video Game Design." *Reference Services Review* 36, no. 4 (2008): 351-365.

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