

RSS: Marketing and Public Relations for Reference Services As the Definition of Reference Changes—How Do We Market It? ALA Midwinter, January 13, 2008

Transforming Definitions of Reference

1876

“Four components of reference service:

1. Instruct the reader in the ways of the library.
2. Assist readers in solving their inquiries.
3. Aid the reader in the selection of good works.
4. Promote the library within the community.”

Green, S.S. (1876). *Personal relations between librarian and readers*. *American Library Journal*, 1, 74-81.

1943

“**Reference work.** 1. That phase of library work which is directly concerned with assistance to readers in securing information and in using the resources of the library in study and research. 2. The work of a reference department.”

American Library Association. Committee on Library Terminology. (1943). *A.L.A. glossary of library terms, with a selection of terms in related fields*. Chicago: American Library Association.

1982

“**Reference transaction** An information contact which involves the use, recommendation, interpretation, or instruction in the use of one or more information sources, or knowledge of such sources, by a member of the reference/information staff. Information sources include: (1) print and nonprint materials; (2) machine-readable DATA BASES including BIBLIOGRAPHIC, FULL TEXT, and NUMERIC; (3) library bibliographic records, excluding circulation records; (4) other libraries and institutions; and (5) persons both inside and outside the library . . . Types of reference transactions include catalog information transaction, fact-finding transaction, literature search transaction, readers or research advisory transaction, referral transaction, research and analysis transaction, and other reference transactions.”

Library data collection handbook. (1982). Chicago: American Library Association.

1983

“**Reference question** – Any request by as library user for information or assistance in locating information which involves an encounter in person, by telephone, or by other means between the user and a member of the reference staff.

Reference transaction – An information contact which involves the use, recommendation, interpretation, or instruction in the use of one or more reference sources, or knowledge of such sources, by a reference staff member.”

The ALA glossary of library and information science. (1983). Chicago: American Library Association.

1999

“The reference transaction is ‘face to (inter)face process involving an inquirer and a librarian, or surrogate, within an information-seeking environment (i.e. a library-like setting).”

Richardson, J. (1999). What’s right with reference—the failures and successes of reference reform. *College and Research Libraries*, 60(3), 211-222.

Current RUSA definition, Adopted in 1984

“An information contact that involves the use, recommendation, interpretation, or instruction in the use of one or more information sources, or knowledge of such sources, by a member of the reference or information staff.”

<http://www.ala.org/ala/rusa/rusaprotools/referenceguide/definitionsreference.cfm>

Current ARL definition

“A reference transaction is an information contact that involves the knowledge, use, recommendations, interpretation, or instruction in the use of one or more information sources by a member of the library staff “

<http://www.ala.org/ala/rusa/rusaprotools/referenceguide/definitionsreference.cfm>

Draft Definition Developed by RSS Evaluation of Reference and User Services Committee, January 22, 2006

“**Reference Work** includes activities that involve the creation, management, and assessment of reference resources, tools, and services, as well as reference transactions and liaison activities. The creation and management of information resources includes the development and maintenance of reference collections, print and electronic research guides, catalogs, databases, web sites, search engines, etc. that patrons can use independently, in-house or remotely, to satisfy their information needs. Assessment activities include the measurement and evaluation of reference work, resources, and services.

Reference Transactions are information consultations in which reference or information staff recommend, interpret, evaluate, use, or teach others to use information sources. This includes referrals or collaboration with other information professionals. Reference transactions may be conducted in person or by mail, telephone, electronic communication, or other means that facilitate an information exchange. Reference transactions do not include formal bibliographic instruction or contacts that provide assistance with locations, schedules, equipment, supplies, software, or policy statements.”

http://www.rusablog.org/blog/_archives/2007/11/14/3352903.html

Draft Definition Developed by RUSA Ad Hoc Task Force on the Reference Transaction, June 24, 2006

“**Definition of a Reference Transaction:** Reference transactions are discrete information consultations provided by library and information staff that respond to questions and recommend, interpret, evaluate, or instruct users on information sources. Responses to quick factual questions are generally termed ‘ready reference’ transactions.”

http://www.rusablog.org/blog/_archives/2007/11/14/3352903.html

Prompts for Discussion:

1. Definitions of the reference transaction focus on contact between the librarian and the user, whereas definitions of reference work encompass activities that don't necessarily take place on the front lines. When marketing reference services to users, how might we convey these other aspects of our work (such as developing the reference collection, creating research guides, and assessing our services)?
 - Confusing terminology
 - Marketing to specific classes or subject areas
 - Embedding library information into course management systems
 - Marketing directly to professors
 - Integrate reference collection into stacks? Would that increase use?
 - Marketing digital reference sources, part of promotion within the institution
 - Do outreach and participate in events
2. Definitions of the reference transaction focus on contact between the librarian and the user, whereas definitions of reference work encompass activities that don't necessarily take place on the front lines. When marketing reference services to internal users (library administration, city administration, fellow staff), how might we convey these other aspects of our work (such as developing the reference collection, creating research guides, and assessing our services)?
 - Importance of selling to instructors
 - Emptiness of reference desk==a sign to administrators that its' no longer necessary?
 - Web tools to make independent learning easier
 - Users don't want to be seen with a librarian as we are "uncool"
 - Millennials want to be able to figure things out on their own
 - Millennials prefer IM to face-to-face (quicker, less "chitchat")
 - Small % do appreciate and enjoy the face-to-face
 - Cell phone reference
 - Seattle U.—should we even put in a reference desk in the new building (opting towards—no)
 - Key to marketing= instruction sessions—go to classes 5 minutes, 10 minutes, etc and present databases etc.
 - Marketing the collection, inadequacy of free resources (i.e. Google scholar etc.)
 - Freshman writing classes, which include mandatory Library instruction sessions
 - Library "advisors" to research method classes
3. As more activities are incorporated within the definition of reference, how do you define marketing success? How do you manage success within diminishing resources?
 - Get invited to student organizations and events – to gather informal information that informs decisions about services and products. (IEEE sales rep.)
 - Help students and professors realize that they are using the library when they are using e-journals, resources outside of the library building.
 - One-by-one conversion of students to awareness of services, collections, and librarians.

- Use students! Get them to demo databases, write testimonials, write blurbs on website.
 - Calling card – PRAs (Personal Research Assistance) like Jeopardy. Get this calling card electronically or physically into all students hands. Create all kinds of specific calling cards for services and collections but keep the same format – look and feel for branding.
 - Go into classes to provide instruction or introductions.
 - You need to define success? Is it increasing one-on-one sessions? Getting into more classes for introductions? Many students expect individualized attention. This is the model they work with from high school.
 - Form a marketing team/committee that has institutional support. University of Virginia has a marketing committee.
 - Reach out to the non-library user: hold special events for them; use different terms for reference “in-depth consultation”; develop new venues (course software, student orgs. Face book, Google Scholar);partner with new people.
 - Take reference out of the library.
 - Partner with everyone you can: when Career Center gives interview training sessions/mock interviews – provide information about the company, product, market or organization that is hiring.
 - Monitor student information sources (student paper, organizations, events, speakers) and then provide an article about a speaker coming to campus
 - ID what is important to a student: save time; manage time better; write a paper more easily.
 - ID what is important to a parent: place an article in the newspaper edition that goes out to parents; host orientations for parents while students are at their freshman orientations – Wesleyan College.
4. New definitions of reference include assessment. How can we use assessment data to further the definition of reference? How do we use the assessment data to market reference services?
- LibQual—grad student, staff, and faculty needs
 - Directing marketing efforts and library image through website
 - Tutorial addressing how to get reference assistance—like University of Northern Iowa, which is on YouTube on how to use study rooms (<http://www.youtube.com/watch?v=CATG3hnbaLo>)
 - Website—pulling library catalog search to the front pages based on survey data
 - Library students redesigning homepage, interesting data, even if designs weren’t used, as you’re getting fresh eyes
 - Online newsletter for grad students (produced by grad school) advertising library services
 - WOREP (Wisconsin)—input from user and librarian
 - Students asking questions and then filling out evaluation form—can lead to changes in staff training
5. Library as place is no longer the only way we reach our patrons. For some patrons the homepage is the only point of contact with the library. How do we market reference services on our homepage and other online venues?

- Marketing using social networking sites, which has its own pros and cons
 - Online reference sources are easier to promote/market with permanent urls
 - Instant Messaging services—Meebo, etc; make sure it's visual and on multiple web pages
 - Developing plug-ins for browsers
 - Marketing, such as in instruction, what do we have that can help?
6. As reference service delivery methods diversity (chat, phone, email, remote reference, social networking), how do we market the differing expectations within each medium?
- Statistics needed—what do patrons use?
 - Email is for old people; “a last resort”; email not quick enough
 - May need a two-pronged demographic approach to marketing
 - Privacy/IRB issues with cell phone referencing
 - Marketing from within the catalog (example: Bowdoin catalog: <http://phebe.bowdoin.edu/search/a>)
 - If you're out and about and available in the stacks, people will seek you out, but don't be a “may I help you” salesperson
 - How often do pages/reshelving students get questions in the stacks?
 - Training students to more “roaming reference”
 - IM on the way out? Text-messaging is the now
 - Alternately—what technologies should we be latching onto?
 - Telephone reference=older generation
 - Older/younger librarian pair-up for training—such as chat
7. With the pre-established generational (child through senior) expectations of our users, how do we market available reference services as well as reference resources to these various groups?
- Students are more inclined to ask students questions – have students work side-by-side with librarians.
 - Maximize use of students to promote library/librarians. University of Virginia has an Undergraduate Advisory committee. It meets once a month 10 times a year and students are paid \$100 a year stipend. Professors were asked to nominate students to the committee to give it status and now students want to join. The students give feedback to library and serve as ambassadors/advocates for the library to student body.
 - Market to Millennials through blogs, IM, text messaging. Email is for old people.
 - Millennials want to figure things out for themselves.
 - Use YouTube – one college put up a video on how to use a study room correctly. It was very humorous but helpful too.
 - Ask film students to make you some very short videos as class projects.
 - Use library school students to get feedback on web design and other aspects of services and collections.
 - All library staff need feedback from all kinds of reference transactions because word-of-mouth is extremely important in reputation of the library whether the experience be good or bad.

8. How do we market our reference services as the lines between distinct library services blur due to patron perception and the movement towards single service points?
 - Public library setting: merging adult and youth reference desks with thought towards adding circulation
 - 80% of questions can be handled by non-specialists; 70% of time calling in specialists
 - “Greeter” role (any staff, tech services, director, a mobile runner)—rover for directional purposes—still referring folks to desk
 - Academic—new librarians offering IT and library help
 - Survey audience and see what they want
 - “research assistance” instead of “reference”
 - Cross-training
 - Rebranding as “information desk”
 - “Infodesk” as triage with a referral services (but students don’t always find it convenient on appointment basis)
 - Point of need assistance in person
 - Rover role useful for connecting with patrons
 - www.sjrlc.org/tradingspaces
 - “ask me” buttons
 - Name vs. no name
 - Statistics for roving, clipboards, tally tickers, rolled into reference desk statistics
 - Market wireless access whether in library or near library
 - Librarian on location
 - Subject specialists going to departments
 - Dormitories, 3-4 hours in evening
 - opportunity to put more marketing and promotional materials about the library all over
 - Person to person contact in student spaces
 - Are reference services marketed separately from other library services
 - Public relations person
 - Instruction and reference marketed together through newsletters
 - Public relation librarian
 - Flyers for library classes offered through reference (newsletters, website, news blog)
 - Rear screen projectors in library with targeted ads for services at different times of the semester
 - PA announcements for classes and events
 - RSS feed, PDF of newsletter—new DVD list increased vies of newsletter
 - Merchandising of collection through displays: business information, health information, etc.

9. How can we educate our staff that every interaction (reference desk, chat, email) is a marketing opportunity?
 - Involve staff in planning process for marketing
 - Create a Top 5 (i.e.: Talk up live chat)
 - Make chat transcripts available and comments, suggestions, readily available

- Peer-monitoring
- Talk it up with staff
- Customer service in-house workshop
- Student/patrons experiences shared with staff
- Survey or focus group to gather feedback

10. How do we redefined and market reference services to make it relevant to non-users?

- Market reference as “in-depth consultations” (change terminology and repackage the idea)
- Not everyone is a reader, market other formats (audio, dvd, computers)
- Special event
- More visuals
- Community rooms (bring them in for “space”)
- Put marketing materials in new venues (e.g.: local AAA baseball stadium, course management system)
 - New venues (e.g. take reference out of libraries)
 - Facebook and MySpace (social networking tools)
 - Google scholar, link to your local holdings
- Partner with new people (e.g. Government entities, etc)

Future Topics for Discussion:

- Success and outcomes (actual examples) with assessment and measurement
 - Nuts and bolts: how do you do it, how do you measure it, what are some resources for the attendee (might make a great preconference)
- A session on ways we “call ourselves” and does it matter; perhaps a list of all the names of reference services out there
- A session on the new Pew survey on the use of information and libraries by 18-20 yr. Olds
 - http://www.pewinternet.org/PPF/r/231/report_display.asp
- Case studies from outside the library on marketing and public relations
- ALA Resources about Advocacy: and how they can be applied to reference services and marketing and public relations
- How does PR work in a variety of situations and how can you make it work for you (e.g. at university, in county, etc.)
- Identifying opportunities within the community to be a “case study” or project
 - Like a film studies class making a YouTube video of your library
 - Marketing class creating a plan for your library
 - Design class creating a new logo for your library