Reference Retreat  
June 29-30, 2009  
Final Report – Submitted November 16, 2009

Introduction  
The first Reference Retreat of the University Library was held June 29-30, 2009 and attended by 38 members of the Library faculty and staff. The reference retreat was viewed as a professional development opportunity to share best practices with colleagues and learn about different ways of providing reference services. The goal articulated for the Reference Retreat was to establish a common operational understanding of the role and place of reference information services in support of our University of Illinois patrons.

The desired outcomes in support of this goal were:  
- To define the work of reference as a more encompassing activity than simply staffing a reference desk  
- To articulate shared service and training expectations across units  
- To establish a referral process and a common understanding of referrals to specialists  
- To formulate competency levels in support of training  
- To examine innovative practices in other large research libraries  
- To determine best possibilities of future configurations for reference service  
- To frame ways to assess the value of reference service.

A rather ambitious undertaking for one retreat, the ultimate desired outcome was to initiate an ongoing discussion regarding the provision of reference services in the University Library and to begin to articulate the future of these services in our environment.

The retreat was held on an afternoon and the succeeding morning in order to bring in as many attendees as possible and to allow attendees time to process the issues broached during the first session. Prior to the retreat, a survey was sent to the heads of units to help determine the current state of reference services in all of their varieties and also to get individuals thinking about who should attend the retreat. A summary of the results of that survey is attached to this document. A summary of recommendations can be found at the conclusion of this report.

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SUMMARY AND GENERAL RECOMMENDATIONS – DAY ONE

The initial sessions of the reference retreat focused primarily on what the attendees wished from the event and developing a definition of reference for the University Library. The shared themes that arose from the introductory session included a desire for a productive retreat with action items and concrete outcomes. Participants also wished for a positive atmosphere where all opinions would be valued.

Defining Reference - None of the definitions of reference (from the Reference and User Services Association, the Association of Research Libraries, and the National Center for Education Statistics) that were presented to the group were found to be satisfactory. Some ideas repeatedly surfaced. First, all three of these definitions relate to how to count reference events and not the act of reference itself. Second, all three of the definitions ignore the
role of instruction in the reference event. Third, none of the definitions articulate the needs of the library user and the relationships developed between the reference staff and the user over a course of time. A general statement culled from the various takes on a definition of reference for the University Library is that it is the act of using knowledge to connect users to what they need including the creation and management of information resources in physical and digital format. The statement was also made that reference service should not be dependent on time or place of the user.

Three goals were articulated for reference services at the University Library:

- We must make reference services available for extended hours.
- We must be able to connect users with subject specialists in a more seamless manner.
- We must provide high-quality reference service.

Recommendation:

**What:** Create a Reference Services website under the Office of Services where we can post the definition of reference as well as announcements of training opportunities, training materials, links to resources such as the wiki, etc. The audience for this site will be librarians, staff, and graduate assistants rather than our users.

**Who:** Office of Services

**Lightning talks** - In addition, the attendees were very enthusiastic about the concept of lightning talks. Lightning talks were brief (three minute) presentations on a variety of projects that are being undertaken in the University Library, followed by a two minute question and answer period. It was suggested that these in some way become part of faculty meetings or some other regular event. The talks underlined the need for more communication about the projects in which our librarians and staff are participating. Four topics from the talks were identified by participants as being of broad interest for brown bags or more in-depth presentation of the topic: Participatory reference, Best practices to incorporate instruction into the reference interaction; Reference “roledex; and Twitter.

**What:** One to two lightning talks should be held at each or every other faculty meeting.

**Who:** Lynne will propose to the Faculty Secretary and Paula Kaufman and follow-up with people who gave lightning talks at the retreat to see if they can repeat their talks for the faculty as a whole.

**Graduate Assistants Panel** - Immediately following the Lightning talk session, attendees questioned a panel of library graduate assistants about their perspectives on the changing landscape of reference service, the value of practical experience, and library training. Panelists suggested that graduate assistants would benefit from more continuing education and training opportunities. These training sessions would allow for better communication about the reference practice in and greater fellowship among all the department libraries.

**What:** Library-wide training follow-up for all graduate assistants such as Voyager updates. Create a close GA list for individuals to share information and converse with one another.

**Who:** Beth Woodard for Staff Training and Development and Library HR/Systems for the discussion list.
SUMMARY AND GENERAL RECOMMENDATIONS – DAY TWO

Building a definition of reference - Day two began with work on a patron-centered, concise, working definition of reference, building upon our discussions at the prior afternoon’s sessions. Each of the tables worked to complete the sentence: Reference at Illinois is user-centered, active, and responsive. Furthermore…. The responses included the concepts that it should be multidimensional and not limited to face to face reference events, "active" should be replaced with "proactive" because we need to meet our users where they are. Further, it was stated that we need to improve communication between each other because ultimately we are a team-based operation. We need to remember that all of our users are not students and we have to customize our services to each type of user - we serve a diverse population with diverse needs. In a related area, we serve users in a variety of locations and need to do it on a 24/7 basis. We also want to increase user independence, and create lifelong learners. We need to remain well-trained, up-to-date professionals who are continually improving our services.

What: Articulation of best practices for each of our user types as part of the Reference Services website.

Who: Office of services.

Working outside of traditional spaces - Tables conferred about how working outside of traditional spaces affects users, librarians/staff, and the organization in both positive and negative ways.

Users:

Positive effects for users include providing services at the point of need, accommodating different learning styles, more relevant service provision, more service points outside of the library, new environments that provide new tools and opportunities and encouraging reluctant/reticent/embarrassed patrons to come to us for assistance.

The negative effects on patrons include increasing the difficulty of finding the "right" person for help, not providing services in traditional spaces where the users expect it, lack of mediation in interactions, and leaving the user in a state of "perpetual beta."

Librarians/Staff:

The positive aspects of working in non-traditional spaces include the opportunity to offer resources to more people in expanding the user base, providing new services to users and "weeding" out older, underused services, to better learn the priorities and struggles of users, to become more multi-disciplinary and having more backup through larger groups. This also moves librarians back to a relevant place in the user’s information seeking behavior and may underline the fact that information professionals are valuable assets outside of the "traditional" library/spaces/employment.

Perceived negatives for librarians and staff include the amount of time necessary for testing new services as well as the time it takes to re-educate librarians and staff. Fear of change and lack of access to the normal and familiar print resources would also prove to be negative aspects. Depending upon the model used for staffing outside of traditional spaces there might be little attention paid to equitable workloads, boredom, and/or lack of collegial synergy. Problems might also arise regarding scheduling and availability for Library meetings and work. Everyone must learn new communication strategies both technological and personal. This model takes money for infrastructure at least. We would run the danger of getting compared to a bad online help system.

Institutional Effects:
**Positives** for the institution would include the ease with which skills could be shared, meeting and facilitating the campus mission, raising our profile on campus and highlighting or even increasing the level of service we provide. It would promote better accountability, better statistical control, and may in this manner prove to be cost effective.

The **negatives** for the institution include the fact that unless properly labeled, we may be seen as members of a non-library unit (e.g. Illini Union staff, College of X staff, etc.) so credit may not be appropriately attributed which may later mean money isn't appropriately allocated. It is possible this would result in increased costs in the areas of resources, new training, staff attrition and loss of specialized expertise. It is currently unclear how much and what kind of non- or pre-professional support is optimal or baseline for success.

**Breakout sessions** - on the topics of assessment, collections, staffing, and referral policies were held in separate areas.

**Assessment:**

Summary - We recognize that reference at our library is diverse in terms of our patron groups and medium, which requires diverse and ongoing assessment methods. Assessment need to be based on outcome evaluations (i.e. did we make a difference?). Assessment should evaluate our reference environment and infrastructure (our online tools, in-person service, referral system.) Also integrated into the assessment program should be an emphasis on what next steps should be taken regarding, for example, marketing, staff training, etc.

Issues from this session include:

1. Confirm value of reference service with library leadership by requesting a commitment from the administration for the provision of needed resources and support.

2. Train staff and librarians on outcome-based evaluation. Establish desired outcomes for reference work in each unit.

3. Commit resources to act on information from past and future assessment activities (LibQual, etc.)

**What:** Training on outcomes-based assessment. Affirm value of assessment by using assessment results for administrative decisions.

**Who:** Library Assessment Working Group, Staff training and development; Administration

**Staffing**

Major themes for this group included recognizing that different units use their graduate assistants very differently. We need to acknowledge the value of subject expertise that comes from those other than professional librarians. Staffing nights and weekends is more difficult for department libraries. Information sharing is becoming more important as changes continue to be made. And, finally, how do we refer patrons efficiently?

**What:**

1. Training for IT Help Desk and ER Tech in the use of Desk Tracker and creating a process/means by which reference questions asked through ERTech and IT can be counted appropriately.

**Who:**
1. Office of Services/David Ward/Kathleen Kern

What:

2. Increase institutional commitment to the subject expertise provided by support staff, graduate assistants, and undergraduate students (in many situations, they ARE the library).

Who:

2. Office of Services with the involvement of LSSC.

What:

3. Cross-departmental commitment to sharing information about reference staffing models to facilitate referral services.

Who:

3. Office of Services/Staff Training and Development

Collections

The common themes regarding reference collections revolved largely around access to tools and the funds for their acquisition. Easy Search is a step in the right direction, but the electronic and print collections need to be melded together and made easily accessible to users. This includes reference tools such as libguides, tutorials, and web pages. Regarding funding, more support for buying expensive titles and interdisciplinary titles is needed. An assigned group looking at interdisciplinary reference materials and purchase would be helpful as would a central reference fund for ongoing access fees. There needs to be a shared rubric for what is kept and what is canceled. Electronic resources should be preferred when feasible. The question of whether there is enough money to facilitate unique action steps in the new service model was also raised.

Issues for reference collections include:

1. Identify or develop a better tool for finding reference materials for both users and reference workers.

2. Create a centralized fund for reference titles and include a reward system or special consideration for cooperation, resources to facilitate the implementation of the new service models, and the development of clear assessment measures for retention of subscription based reference resources.

What: A search tool should be developed to aid in reference work.

Who: Bill Mischo is working on an Easy Search for reference tools.

What: Revised collection policy for reference works.

Who: Tom Teper/CDC

Referral policy
The concept of a referral policy for both electronic and in-person reference had been identified as an issue that could result in a positive result from the retreat. Several questions had been identified relating to this topic including what the criteria should be for when a user is referred elsewhere, what is the process for a referral, what is the responsibility of the referring library, and what might the best practices be for this process.

1. The following policy is proposed for review by the Services Advisory Committee, the Administrative Council and, if necessary, the Executive Committee to ensure that it is evenly applied throughout the University Library.

In person referrals –

A. Conduct a full reference interview.

B. Ask yourself the following questions:

- Can I conceivably answer this question using widely available reference sources?
- Will this question take longer than 10 minutes for me to answer? (Could a subject specialist do it faster?)
- Will the patron be better served by a subject specialist?

2. To ensure smooth and effective referrals, create a current and searchable database or other online tool that could be used to identify the librarian(s) or staff member(s) to whom the question should be referred and prove related contact information. This source would provide each specialist’s name, phone number, library, subject area(s), hours of availability, and preferred medium for receiving referrals. (Note: This item was suggested after the retreat was over by members of Central Public Services and could be based on the list that exists on the Office of Collections page at: http://www.library.illinois.edu/administration/collections/subjectdirectory.html. This page would need to be enhanced with subject specialists’ contact information, hours, etc. The current list is related primarily to fund managers who are not necessarily reference providers.

3. Create the following documentation for referrals:

- A referral form that can be transmitted as an assessment of how many referrals are made, to which libraries the patrons are being referred, and if the student actually shows up for the referral. This form could be made part of the Desk Tracker system and might include the student’s name and email address for follow-up if privacy concerns can be solved.
- Concurrently, create a reference sheet that the patron can take with them to the library to which they have been referred. This form might include the databases already searched, contact information for the library and/or subject specialist to which the user is referred.”

4. IM Collaborator –

(1) Needs to be more fully collaborative

(2) Needs as many online tools as possible for communication between libraries, enable follow-up with patrons after referral

(3) Needs to assist in creating web pages on the fly during or after a chat that contains all of the sources referred to, the information for searches, contact information, etc. – a web page that the patron can refer to for later use and that they can show to the library personnel they have been referred to.

Who:
1) Service Advisory Committee, Office of Services, AC, EC

2) Office of Collections, Services, Robert Slater

3) Office of Services, Robert Slater

4) Office of Services

Designing and Planning Ongoing Professional Development – Final Discussion

The concept of a referral policy surfaced several times again in the final discussion of the day. In addition, the concept of better communication and accountability between units was emphasized. The channels of communication need to remain open and we need to know about the innovative projects within the units and the new tools being used in the Library.

A task force for developing best practices should be formed to pull together the related resources, and the task force should be open to accepting information from individuals who are not necessarily members of the group.

At a minimum, each unit should commit to providing synchronous online reference service for the same hours they provide face-to-face reference services.

Reinvigorate training for all front line personnel – undergraduates, graduate students, staff, academic professionals, and faculty. Continuing self-education and sharing with others what we know is related to this as well. A reference blog was suggested to keep the ideas and conversations going, as was a continuing series of reference retreats or meetings focused on various discrete aspects of the work.

Focus on our users to discover what they need, when they need it, and in what format.

Finally, it was noted that we need a change in community culture – we don’t need shared practice as much as we need a shared vision of what reference should be.

Evaluation of the Retreat

A brief, three question survey was handed out at the end of the first day. The results are available on the wiki at http://referenceretreat.pbworks.com/First-Day-Survey. The full report of the final evaluation of the retreat is available on the wiki at http://referenceretreat.pbworks.com/Post-Retreat+Documents. The general reaction was positive although the content of the retreat was seen as too general and the attendees wanted more “takeaways” from the event.

SUGGESTIONS FOR THE FUTURE

In sum we recapitulate the suggestions developed at the retreat and generally assign responsibility for implementation of these suggestions:

1. Create a Reference Services Website under the Office of Services where we can post the definition of reference as well as announcements of training opportunities, training materials, links to resources such as the wiki, etc. The audience for this site will be librarians, staff, and graduate assistants rather than our users. (Office of Services and “Reference Services Web Site Task Force”)
2. Provide one to two lightning talks to be held at each or every other faculty meeting. (Lynne Rudasill will contact individuals for presentations this year. The SAC proposes that the Faculty Secretary be asked to
incorporate calling for participants at faculty meetings as part of the Faculty Secretary’s duties regarding agenda development.)

3. Articulation of best practices for each of our user types as part of the Reference Services Website. (Office of Services.)

4. Assessment – Training on outcomes-based assessment. Affirm value of assessment by using results for administrative decisions. (Library Assessment Coordinator, Library Assessment Working Group, Staff Training and Development; AULs and University Librarian)

5. Consult with Library IT Help Desk and ERTech on keeping a record of their reference transactions with public users. Provide each group with training as needed to incorporate public reference transactions in Desk Tracker. (Peggy Steele, David Ward, Kathleen Kern)

6. Increase institutional commitment to the subject expertise provided by support staff, graduate assistants, and undergraduate students (in many situations, they ARE the library to our users.) (Office of Services with the involvement of LSSC)

7. Cross-departmental commitment to sharing information about reference staffing models to facilitate referral services. (Office of Services; Staff Training and Development)

8. A search tool should be developed to aid in reference work that goes even beyond the Easy Search to include libguides, reference works, and more. (Bill Mischo is working on an iteration of Easy Search that might accomplish this.)

9. Revised collection development policy for reference works. (Tom Teper/CDC)

10. The Services Advisory Committee, Office of Services, Administrative Council, and Executive Committee needs to review and approve the suggested policy for library referrals.

11. To ensure smooth and effective referrals, create a current and searchable database or other online tool that could be used to identify the librarian(s) or staff member(s) to whom the question should be referred and prove related contact information. This source would provide each specialist’s name, phone number, library, subject area(s), hours of availability, and preferred medium for receiving referrals. This page would need to be enhanced with subject specialists’ contact information, hours, etc. (Office of Collections/the Office of Services/Robert Slater)

12. Develop documentation that will support the recording of referrals for both the referring unit and the receiving unit and providing the user with a copy of those resources that have been used in pursuit of an answer up to the point of referral. (Office of Services/Robert Slater)

13. IM Collaborator needs to be more fully collaborative; might need as many online tools as possible for communication between libraries to enable follow-up with patrons after referral, and needs to provide the opportunity to assist in creating web pages on the fly during or after a chat that contains all of the sources referred to, the information for searches, contact information, etc. – a web page that the patron can refer to for later use and that they can show to the library personnel they have been referred to. (Office of Services)

In conclusion, the working group has several more general suggestions for the future of reference at the University Library:

1. Explore the development of a communications channel for graduate assistants and provide refresher courses for them that would be offered over the course of the year.
2. Develop more flexible tools to be used for referrals in particular, and assessment in general.
3. Consider charging a new “Reference” committee in the University Library and/or create a position for a coordinator of these services (but please have that person also do reference).
4. Consider another reference retreat in six months to a year that is only one-half day and has a very focused topical area from which concrete actions can evolve.
5. Keep the conversations going!

The Reference Retreat wiki can be found at http://referenceretreat.pbworks.com/
Committee Members:
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Tony Hynes
Kathleen Kern (Co-Chair)
Katie Newman
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