On-Site Reference Services and Outreach: Setting Up Shop Where Our Patrons Live

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ABSTRACT

Electronic, full-text resources and on-line forms have become ever more established in most organizations. As a result, foot traffic in libraries has significantly decreased leading to fewer opportunities for personal contact between librarians and patrons. Innovative outreach efforts are required to counter this trend. In the past two years, some University at Buffalo librarians have set up office hours in the departments they serve to provide on-site reference and consultation services. The author targeted the physics department for outreach with two sets of office hours per week. Feedback, especially from faculty who felt isolated from the centralized Science and Engineering Library, has been excellent. This effort has also produced unexpected benefits, such as outreach to students in other majors taking courses in the department being served. Based on our experiences of the past two years, the various costs, benefits, and pitfalls of setting up on-site will be discussed. A high traffic location in the department is essential because there is no point trading one low traffic area in the library for another in the academic department. Efforts at other institutions will be reviewed, though literature on this topic is sparse.

Additional outreach efforts to establish direct librarian-patron interaction will be discussed. Targeted email communications based on faculty research interests have led to other opportunities to promote library resources and services. Visibility at departmental activities such as seminars and social events is invaluable. Taking advantages of any small opportunity such as installing software in a faculty office or responding to a casual request or contact is important. The key to successful outreach is attitude, commitment, and consistency. In sum, the experience at our university has shown that there is no substitute for providing a physical presence. We believe this approach can be applied in most academic settings and beyond to other types of libraries.

INTRODUCTION

All progress has at least a few consequences that are either unintended or negative or both. For good reasons, librarians and the patrons we serve have benefited greatly from Internet age. Electronic databases are available 24 hours a day and can be accessed from home or office. Electronic reference, course reserve, and e-books are never checked out or missing from the shelves. Electronic forms for functions such as renewal and recall of material and virtual reference permit efficient use of both patron and librarian time.

All these advancements eliminate many of traditional reasons that patrons actually visited the physical library with its carefully maintained collections, helpful staff, and well-designed service points. This is not exactly an unintended consequence since much of the motivation for going electronic was to make things as convenient as possible for the patron. In most settings, one
of the inconveniences was traveling to the library during the hours it was open. The impact on our
time-honored gate counts, i.e. foot traffic, was expected and is easily verified both subjectively
and quantitatively (Carlson, 2001; Lowry, 2003; Shill & Tonner, 2004; Weise, 2004). What is
lost is the personal touch, opportunities to interact face to face and provide “eyes on” and “hands
on” instruction and dialog.

Broadly speaking, libraries have responded in two ways. The first is to offer a variety
of enticements to come to the library beyond browsing the book shelves such as group study space,
coffee shops, extended hours for computer areas, comfortable seating, free printing, and wireless
networking (Engel & Antell, 2004; Riggs, 2002; Shill & Tonner, 2003; Weise, 2004). These
efforts are commendable, though occasionally this negatively impacts those desiring an intensely
quiet research and study environment. The second way is to institute outreach efforts designed to
bring library services and, by extension, librarians to wherever the patrons live and work. Brown
gag lunches with faculty, workshops, participation in curriculum planning, and attendance at
college events are but a few of the techniques described in the literature (Buchanan, Luck, &
Jones, 2002; Casthorne, 2003; Dilmore, 1996; Ducas & Michaud-Oystryk, 2003; Fabian,
D'Aniello, & Tysick, 2003; Kraemer, Keyse, & Lombardo, 2003; Raspa & Ward,
Certainly neither of these responses—enticements or outreach—are new ideas. After all,
bookmobiles are a time honored way to bring libraries to the patron.

Many academic libraries have consolidated subject or departmental libraries into more
centralized units. Staffing, budgets, and the greatly increasing multi-disciplinary nature of nearly
all research made is centralization nearly inevitable. The redundancy of service points and
subscriptions was unsustainable. In a sense, the electronic age has allowed librarians move back
to the departments with a virtual rather than physical collection in hand, once again providing
services in close proximity to small groups of patrons. To the best of this author’s knowledge, this
was first tried and publicized by the Virginia Polytechnic and State University Libraries, though
they used the rather ambiguous term of “college librarian” (Schillie, Young, & Ariew, 2000;
Seamans & Metz, 2002).

The author could find almost nothing else published on attempts by libraries to set up
weekly “drop-in” office hours directly in the academic departments. However, clearly this is
being tried by a number of libraries. In April 2003, Randy Reichardt created a weblog of
responses to a posting to a number of lists on which libraries offered remote reference and
information services (Reichardt, 2003). Not counting responses from libraries physically located
inside academic departments, responses were received from:

- University of Minnesota ("mobile librarians")
- Georgia Institute of Technology
- Carnegie Mellon University
- Virginia Tech (apparently has switched from “college librarians” to “field
  librarians”)
- Wright State University
- John Hopkins University
- University of Western Ontario ("Librarian On-site")
- University of Waterloo
- Willamette University
- Michigan State University
This paper will describe efforts at the University at Buffalo to set up references services physically in select academic departments for a few hours every week by subject specialist librarians serving those departments. This is most successful in the context of a multi-faceted approach to patron outreach that includes targeted email, attendance at seminars and departmental activities, and other pro-active contacts with faculty members. Though an academic setting is described, many of these techniques can be applied to any situation where patrons are within reasonable travel distance of the library.

**OBJECTIVE**

As indicated by the introduction, the objective was to test bringing reference services and research consultations to where our patrons live and work by setting up office hours in a high traffic area right in the department. Even the best designed reference services inside libraries tend to be:

1) **highly passive**, waiting for someone to have the courage to approach the “big desk” with an unfamiliar face behind it, or
2) **virtual**, which often is anonymous or involves little dialog which minimizes the relationship building needed for extended and repeated interactions.

In this virtual world, we wanted to see what benefits could still be obtained by engaging in non-virtual, i.e. in-person, reference and research consultation services.

**BACKGROUND**

The University at Buffalo is the largest university in the State University of New York system with about 28,000 FTE’s (full-time equivalent students) on two sizable campuses separated by 3 miles. The campuses are served by ten library units. Thirty-six librarians have liaison responsibilities to specific academic departments, acting both as specialist collection development and public service librarians. The University Libraries offer over 200 databases, electronic course reserve and interlibrary loan, web forms for common library functions such as book renewal, and reference by email, phone, and instant messaging. We also provide electronic document delivery between our two campuses. Hence, except to sign out a book or access a journal that is not available electronically, there are few reasons patrons absolutely must physically come to the library. All this is commonplace in academic institutions of all sizes.

We of course have done our best to promote our collections and services, provide study space, extended hours, scores and scores of computers, etc. Though it is fighting an uphill battle, our bibliographic instruction stresses that the Internet or even our electronic subscription databases, are not the be-all and end-all of library research. The value of print resources and consultations with information professions are noted at every opportunity (Dilevko & Gottlieb, 2002; Weise, 2004). Still this is not enough.
METHODOLOGY (ON-SITE REFERENCE)

To the author’s knowledge over the past 2 years, five subject specialists at the University of
Buffalo have piloted on-site reference in seven departments: Anthropology, Classics,
Communications, African American Studies, Industrial Engineering, Career Services Center, and
Physics (See the Acknowledgements section at the end of this paper). The success of this new
service varied in each department, but in each case important contacts were made and key lessons
learned.

Typically the chair of each department was contacted to negotiate a reasonably high
visibility space such as an office in a main corridor, a corner of the reading room, or space close
to the departmental office. In one case, a subject specialist serving three departments started the
service at the request of one department. When the other two departments found out about it,
they, in the true spirit of academic competition, eagerly invited the subject specialist to set up
shop in their departments as well.

The time commitments, given these were all pilot programs, were small, only 1.5 to 4 hours
a week during the regular semesters. One important reason to start small is that it is always easier
to add service hours as demand warrants while cutting back hours would be perceived as
withdrawing library support for the department.

Certain common sense planning went into setting up the office hours. Times were chosen
when many people would be in their offices, and conflicts with major classes and departmental
events were avoided. Librarians committed to guard office hours from other scheduling conflicts.

Since most subject specialists serve multiple departments, careful thought was given to the
most strategic places to start. Factors in this decision included the distance from the physical
library, the department culture, historical relationships to the library, and the physical space
characteristics of the department. In the author’s case, he serves the physics and chemistry
departments. Physics was chosen for this pilot project because it was a physically compact
department with an obvious main corridor containing the chair, assistant to the chair, and the
departmental offices as well as the main conference/social room, and photocopier. Faculty and
graduate student offices were generally close at hand.

In contrast, the chemistry department is spread over six large floors with offices separated
by extensive lab spaces. There is no high traffic area. In addition, the chemistry faculty was
already highly engaged in library resources and services, frequently using email, phone, and visits
to contact the author. For a variety of reasons, the physics department felt more isolated from
library services. Hence, a strategic decision was made to begin with the department underutilizing
the library.

Given the extensive electronic resources available, equipment needs are minimal. A
computer with Internet access is the only essential. Having one’s own laptop is useful as one can
be familiar with and control the programs on it. A phone and access to a printer is helpful, but as
long as one can email results, this is not essential.

Once space, office hours, and equipment needs were set, it became a matter of marketing.
As with any library service, visibility, email and verbal reminders, pro-active attitude, and other
forms of promotion are key. For example, one’s office hours should be mentioned at every
bibliographic instruction session conducted for the department.
The author created a “shingle” suspended from two wooden slats that could be taped to the door frame and hang out into the hall during office hours. A colorful graphic from a physics paper and the text “The Physics Librarian is IN” was easily created. The flashing Institute of Physics Publishing (IOPP) badges, “Physics turns me on”, were a perfect addition, calling attention to the sign without being obnoxious. The shingle caused more comment than any other promotional effort tried.

Attention to detail is important. The author brought in a sturdy TV tray to place his laptop on so that he could keep an eye on the hallway. Using the existing desk would have meant having his back to the door. Standard enticements such as food, giveaways like the IOPP flashing badges, a name tag, occasional email reminders, and increased visibility at departmental seminars and functions were all part of the promotion efforts.

It was quickly discovered that an important component of being pro-active was to seize every opportunity to engage people passing by. An attitude not unlike a carnival Barker on the midway enticing people to their stand is useful. The old technique of asking leading questions works the best, especially for those who “just stopped by to say Hi”. Questions like “Any problems using library services or resources?”, “Have you seen SciFinder® Scholar yet?”; or “How do you find the information you need?” frequently led to meaningful interactions and demonstrations. Keeping an eye out for passersby and even standing out in the hall from time to time provided many opportunities.

Before we discuss the specific findings of our experiences with on-site reference at the University of Buffalo, it is important to view this effort in the larger context of faculty and student outreach.

**METHODOLOGY (LARGER CONTEXT OF OUTREACH)**

On-site reference services are not a magic bullet, making all other forms of outreach redundant. Much has been written about outreach and faculty outreach in particular (see Works Cited section). Patrons respond best to consistency and quality across the entire package of library services and resources. Such a multi-faced approach must take into account the culture and information needs of departments and individuals.

At the risk of stating the obvious, exceptional customer service that never “dead ends” a patron request and is fast, accurate, and appropriately comprehensive should not be a goal or an occasional achievement, but standard operating procedure. There are many strategies described in the literature for pro-active patron outreach. Techniques the author has found particularly effective are:

- Attendance at least once a month at seminars (especially given by one’s own faculty) and other departmental events.
- Maintenance of a faculty interest database in a simple spreadsheet database. This allows occasional forwarding of particular resources of interest to just a few people.
• A conscience effort to exceed even exceptional customer service standards for the first few requests from any new patron. First impressions count. If one blows (or even provides average service) for the first 1 or 2 requests, the chances of a long-term relationship greatly diminish.

• Focus on as few, as brief, as informative email communications as possible. Departmental personnel are extremely busy. Get feedback from faculty and students on your email outreach efforts. There is no single answer for every department. This author foregoes all routine announcements of new books, reference materials, and databases. Only those resources and services of truly prime importance are passed on. A bullet point newsletter 8-9 times a year, no more than 1.5 pages long, tailored to a single department seems to be the best strategy for the departments served by the author.

• Seize even the smallest opportunity. For example, despite reasonably clear instructions on the web regarding the installation of the SciFinder Scholar access program, the author immediately offers to make an office visit for anyone having the slightest problem getting connected. For one thing, it saves the frustration of a 15-minutes phone session only to end up going over to their office anyway. More importantly, getting on-site provides the perfect opportunity to slip in a 5-10 minute demo with a captive audience, e.g. “Have you seen the new features of the 2004 version?” or “Is there anything you’ve had trouble searching?”.

FINDINGS (ON-SITE REFERENCE)

• A high traffic area is essential. There is no point trading one low traffic area (the library) for one in the department. This factor is so essential that the author believes lack of a good location dooms the attempt to failure.

• Given the modest time commitment, we were expecting at best a few small signs of appreciation. We were completely unprepared for significant good will generated among the faculty by this single service. They spoke of it to colleagues and visitors with obvious pride. This one action communicated in a way that years of other efforts had not, that the library really cares about this department and wants to help them. This author received a warm, thank-you email just for announcing the office hours, before they had even begun. The long-term impact of this good will should not be underestimated. In the case of the physics department, the entire relationship to the library has been transformed into a far more positive one.

• Another unexpected benefit was meaningful contact with students from other majors that happened to be taking physics department courses. In one notable case, an extensive demonstration of INSPEC® was provided to a computer science student with an interest in virtual reality. He had never heard of INSPEC before this and was amazed (as students so often are) at the high quality scholarly material so readily available in subscription databases.

• It was clear from both verbal and nonverbal cues that many of the questions and interactions would have never taken place had so much as an email or phone call been required. The most common opening line ran something like this, “I was just passing by and was wondering if ….”
• As with all services, it needs to be refreshed. Find ways to target specific patrons with specific resources. When contacted about setting up a consultation, always mention one’s office hours and see if the patron can see you then. Even if those hours do not work, you have planted a reminder that you do spent time in the department. Try different hours from semester to semester and consult with the chair’s assistant to establish times when people will be free.

• Above all, the pilot program demonstrated that face-to-face still outshines email/virtual interactions. The interactions were immediate, visual, high impact, tailored, and personal. The more relaxed atmosphere of a department office as opposed to the typical open reference desk environment, permitted follow up questions that often led to extended instructional opportunities. A casual question about finding an article could lead into a discussion of interlibrary loan, finding electronic full-text and why everything is not electronic. This can lead to a discussion of research interests and an opportunity to demonstrate a few key databases, retrieving citations of immediate interest.

• In general, the number of quality interactions usually matched a “good” shift at the reference desk, 1-2 per hour after one subtracts out all the important but routine directional questions and equipment problems. Certainly there were slow weeks and never long lines outside the office. Still long term it is expected that opportunities will continue as information needs arise.

• Opportunities have frequently opened up beyond whatever office hour interactions occur. In one case, a librarian set up office hours in the department chair’s outer office area with an accompanying e-mail announcement from the chair to the entire department. Though only a few students took advantage of the office hours, the librarian noted a marked increase in the number of students from that particular department emailing requests and setting up appointments in the Science and Engineering Library. The announcement by the chair had given the librarian a new visibility and “imprimatur”. In another cases, it has led to sitting in on search committee interviews, positions on library development committees, invitations to important networking social events, and even an opportunity for joint publication with a faculty member. Clearly evaluating on-site office hours only on the basis of number of transactions per hour is inadequate and misleading.

• The relationship building that occurred is reflected in comments from the subject specialists:
  - “They are requesting more materials; the libraries are now on their radar screen.”
  - “The departments feel special because they have a librarian on-call.”
  - “You start to understand how they approach research.”
  - “You get a quicker response from the faculty.”
CONCERNS

Initial concerns raised about this approach have generally not created significant problems in practice. There was a concern about sustainability given the many demands on subject specialist time. Though it would be false to say each attempt was uniformly successful, sustainability is really a matter of priorities, time management, and commitment. As long as one starts with just a few hours each week and has management support, the impact on one’s schedule is not dramatic. Of course, just as with a regular reference desk, there are many lulls in the action permitting some email and other work. It is important that this not detract from pro-actively greeting passer-bys and even doing a bit of wandering around the hallways close by. At the University at Buffalo, we have been the process of combining service points and frequently use carefully trained students to remove some of the burden of extensive desk duties. We are encouraging students and faculty alike to set up appointments so that high quality, subject-specific consultations can be provided.

Being away from one’s office was another concern. Given the few hours a week and how few patrons drop by most of our regular offices, where is the time better spent? Is the problem really the few hours of departmental reference or the 15 hours of meetings in a typical week?

A final concern was that, although the librarian is on-site, the resources are completely virtual, i.e. electronic. Even 5 years ago, doing reference without print collection might have been problematic. With academics often needing background and some good references for a first pass, there have been few problems doing e-only reference. It is always possible to arrange follow up consultations back at the library. In other words, on-site reference services is not intended to replace other types of reference consultations via electronic communications or at the library building.

CONCLUSIONS

For all the advances in virtual reference service delivery technology, face-to-face interactions should not be abandoned. On-site departmental reference services is not the complete answer for patron outreach. For one thing, it works best within the larger context of faculty and student outreaches that intentionally build relationships long term with the department, such as attendance at faculty seminars and departmental events. Nor does it replace email, phone consultations, instant messaging, general exceptional customer service, and library-based reference services and appointments.

However, in the right settings, on-site reference has been the single most effective service for communicating a direct interest in the information needs of both faculty and students in a department. By spending even a few hours “on-site”, significant good will is generated and opens the door for additional interactions. The keys are to be persistent, seize every opportunity, be patient, and keep trying various strategies until something works.
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WORKS CITED


