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### Applying Information Competency to Digital Reference

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### Abstract:

This paper presents a case for applying information competency (IC) standards to digital reference services at academic libraries. Practical reasons for applying standards or guidelines to e-mail and online chat reference services are given with some insight to the nature of digital reference interactions. The standards that arose from the information competency movement in academic libraries are described and offered as a touchstone for planning and designing digital reference services. The paper concludes with preliminary ideas for how IC standards could be applied to the provision of digital reference.

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### Overview of Digital Reference Services

Libraries around the globe are exploring ways to offer reference service online. E-mail reference was the first service mode tried out, making its first appearance in the mid-1980s (Gray, 2001). Initially, libraries simply offered an e-mail address for users to send their questions to. Many libraries now require users to fill out a Web form in which they must provide additional information about their request that will help the responding librarians. Some e-mail reference services, such as the one at the Internet Public Library, use software to manage the flow of e-mail between user and answering librarian. A rapidly expanding number of libraries are now launching

chat reference services (Francoeur, in press; Sloan, 2001). The first chat services only allowed for instant exchange of short messages between user and librarian, but now thanks to the development of increasingly sophisticated software, online interaction between patron and reference librarian has grown richer.

Taking advantage of software initially designed to assist online customer service, some chat reference services now make it possible for the user and librarian to synchronize their browsers so that whenever one person clicks on a link in their browser window to go to a new web page, the other person is led to that same page, too. Known as collaborative browsing or escorted browsing, this feature even allows one person to fill out a form on a Web page for the other, a trick that comes in handy for the librarian demonstrating to the user how to search databases.

Another form of digital reference that has been experimented with (though with less success) is video reference. Early projects showed some promise but were shelved due to a number of drawbacks, the most problematic of which was that the technology used to deliver these services really is not in widespread use yet and requires substantial bandwidth (Sloan, 1997, 2001). Given that e-mail and chat services are currently the most popular forms of digital reference, this paper will focus on the development of standards and policies for these two service points, particularly at academic libraries. We suggest that as librarians experiment with new digital reference services, they should consider the role that instruction plays in online reference interactions. One resource that may help in the planning and design of these new services are the recently created standards that attempt to describe what makes a person competent in the use of information.

### **Why Digital Reference Needs Standards**

The Reference and User Service Association, a division of the American Library Association, has created many committees over the years to establish standards related to reference assistance. Notable examples include guidelines for writing manuals to be used in a cooperative reference service (Cooperative Reference Service Committee, Reference and User Services Association, 1998), guidelines for evaluating the behavioral aspects of the interaction between librarian and patron (Reference and Adult Services Division Ad Hoc Committee on Behavioral Guidelines for Reference and Information Services, 1996), and guidelines for the provision of information services (Standards and Guidelines Committee, Reference and User Services Association, 2000). Such standards establish a framework from which individual libraries can construct their own policies and guidelines.

As noted by Sloan in a 1998 article and as is still the case, there are not any guidelines from national library organizations about the provision of digital reference. As noted in the standards developed by the Reference and Adult Services Division (RASD) Ad Hoc Committee on Behavioral Guidelines for Reference and Information Services (1996), the policies they set forth are "primarily to deal with instances in which the patron and librarian are working face to face." The guidelines do note, though, that some of the suggested guidelines can "be adapted for [services offered to] remote users." We argue that more needs to be said about how these policies play out in the world of digital reference as it is practiced today. When the RASD guidelines were written, the concept of remote users of reference was understood to mean patrons asking questions via telephones, letters, faxes, or e-mail. With the recent rise of chat reference services, the picture is more complicated, and the issues more complex and pressing.

One such complication is that communication in the online environment (especially in chat) is different from face to face (lack of nonverbal cues, sense of temporal and physical dislocation, etc.) Much of what has been written about how to conduct a reference interview assumes that user and librarian are face to face. While there is a small body of literature about what the reference

interaction is like in e-mail services, there has been little work yet on interactions in a chat service.

Second, the information landscape has changed considerably since the standards were written in the mid 1990s and is forcing librarians to rethink who their users are, what their users' information needs are, and how libraries can address those needs now. Much has been written lately about the changing roles for reference librarians in this ever-shifting landscape (Koyama, 1998; Lipow, 1999a, 1999b; Wilson, 2000). One way that librarians can work through the new issues confronting them is to develop guidelines and standards for these new digital service points.

For the library considering the launch of a new digital reference service, the exercise of designing standards for that service could be part of the planning process. It could be seen as a way of defining what the service will do, deciding what user needs will be met with it, and figuring out how that service will operate in the context of other modes of reference assistance available at the library (reference desk, telephone, office consultations, etc.)

Digital reference guidelines would also help ensure quality reference assistance by establishing baselines for service and thereby aiding staff training and evaluation. Guidelines will also be invaluable for libraries that form a consortia or informal alliances so that they can provide reference assistance to their combined pool of users, a point made by Kasowitz, Bennett, and Lankes in a recent article (2000).

### **The Information Competency Movement in Libraries**

The Association of College and Research Libraries (ACRL) defines an information literate or competent student as someone who can “recognize when information is needed and have the ability to locate, evaluate, and use effectively the needed information” (American Library Association, 1999.) With the explosion of information now readily available to students via the Internet and the Web (which includes both reliable and unreliable sources), students of all levels need to work toward a mastery of information literacy so that they can make informed decisions about what they decide to use.

The level of a student's information literacy (or, as we prefer to call it, information competency) has great impact on academic success. Beyond the immediate world of higher education, information competency also fosters career success, responsible citizenship, and lifelong learning in general. The path toward information competency does not end upon graduation from college or even graduate school but is an enduring process, one that empowers individuals to assume greater responsibility for their information seeking behavior and their learning.

In January 2000 the underlying principles of information competency were fully articulated into a set of five standards and twenty-two performance indicators; the final document is known as the ACRL Information Literacy Competency Standards for Higher Education (Association of College and Research Libraries, 1999). The five standards specify that an information literate student is able to:

- Determine the nature and extent of information needed
- Access the needed information effectively and efficiently
- Evaluate information and its sources critically and incorporate selected information into one's knowledge base
- Use information effectively to accomplish a specific purpose

- Understand many of the economic, legal and social issues surrounding the use of information and access and use information ethically and legally

The twenty-two performance indicators and outcomes describe activities associated with a student's demonstrated knowledge or understanding of the five standards. These standards can help librarians and instructors in discipline-specific departments decide what they want students to learn and on what to assess them. Many academic libraries have begun to incorporate these standards into the curriculum for their instruction programs and are actively redesigning the way they teach in workshops, course-related lectures, and library credit courses.

The real power of the ACRL standards, though, will become apparent as they start to move beyond the world of academic libraries and are adapted into an entire college curriculum. The movement in libraries to use the ACRL standards dovetails with a movement among some college accreditation agencies, such as the Middle States Commission on Higher Education, to require a comprehensive approach to information competency that pushes librarians, college administration, and discipline-based faculty to work together.

In the case of the Newman Library at Baruch College, the IC movement had already taken hold before the ACRL standards were finalized. A strategic plan for the library that was created in 1998 incorporated a set of IC standards developed by the State University of New York system, thereby paving the way for the adoption in the library of the ACRL standards. From the strategic planning process, the library came to recognize itself as a teaching library, an understanding whose wide-reaching implications are still being worked out in the services we offer to students and faculty.

At the Newman Library, IC standards have not only filtered out into the way librarians provide formalized instruction in the classroom, they have also begun to affect the way that our staff provides reference assistance. Although the reference desk at the Newman Library has long been a place where students received instruction, many of our staff members began spending more time thinking critically about the way that that instruction was delivered at the desk.

With this gradual evolution of reference, we (the authors) have come to a realization that perhaps the IC standards used to redesign the library's instruction could also help reshape reference services. Since the library's digital reference services are in such an early, formative stage, these services might be more open to experimentation. Before considering what that might look like, it is worth noting how librarians at Baruch used the ARCL IC standards to revise the way they work in the classroom.

### **Digital Reference and Information Competency**

The Curriculum Committee of the Newman Library was asked in the summer of 2000 to design a course of instruction to be provided to about seventy sections of a required freshman composition course in the fall. To design a curriculum for this project, which we called the Freshman Research Experience, librarians reviewed the ACRL IC standards and identified which of the learning outcomes it could teach to in the two library workshops that each section would attend. After whittling down the IC standards to what we believed we could accomplish, we designed a curriculum that each librarian would follow when teaching different sections of the course.

Although the library did not formally assess our impact on the students who we taught through this initiative, we received anecdotal comments from English faculty about the improved quality of student research papers. It is clear, though, that by going through the process of examining the ACRL standards, talking about them, and selecting those that we believed were important, we not

only improved the quality of our instruction but we also raised the bar for all of our instructional efforts.

This same process might also prove beneficial to libraries that are experimenting with digital reference projects. Although the level of interaction between user and librarian might seem limited in e-mail and chat, there are real possibilities for instruction. There are also some interesting benefits to providing instruction in this mode. For example, the user can request assistance at the point of need (instead of having to wait until they come into the library) and can thus keep the momentum going in their quest for information. Since e-mail and chat reference are both text based, at the end of a reference interaction, the user is left with a written record of the assistance offered that they can refer back to as needed.

To provide instruction via e-mail and especially via chat, though, librarians will need to work creatively to get their point across in a mode of communication that can be frantic and sometimes a little chaotic. The heightened pace of chat communication only exacerbates the problem librarians encounter of getting the student to slow down and think more carefully and thoughtfully about their search. It is easy enough to teach the user to perform an online search generating dozens of hits, but it is a real challenge to get students to take the time to critically and deliberately assess their search results (i.e., to read what is on their screen). Academic librarians must get users to reflect (as opposed to react) amid the vast chaos of the Internet.

By reviewing the ACRL standards in information competency, librarians will have an overarching framework to understand what it is that students need to know about finding and using information; from this understanding, librarians can then decide what level of instruction they can accomplish in digital reference interactions and can plan their services accordingly.

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