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The Unopened Door: The Virtual World and Reference Services Reality in the Caribbean

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Abstract

The comfort level with the technology and the ease of access to all kinds of information which it provides has privileged the web as the research tool of first choice among today's library users. Libraries are responding by introducing web-based reference services through email, instant messaging, live chat and/or virtual reality tools like 'Second Life' to meet the needs of these techno-literate users. Focusing on an academic library in the Caribbean, this paper contends that despite the perceived advantages of using technology to provide reference service, circumstances in the local environment militate against privileging virtual reference over traditional reference. The paper will examine issues such as the differing information research skill levels among students, the physical format of the library collection, the un/availability of the requisite professionals to staff a virtual service and the underlying role culture plays in this paradigm.

Introduction

Rapid developments in information communication technologies have caused librarians and libraries to rethink and recast their approaches to reference services provided to users. Exacerbating this need for reference services to be reframed is the entry of many non-traditional information service providers who are offering potential library clients alternative options to satisfy their reference needs. In response, libraries have introduced into the delivery arsenal of their reference departments communication tools such as e-mail, instant messaging and live chat. These virtual tools provide reference services in real time wherever and whenever they are needed as against conventional face-to-face services which are place-bound and constrained by time frames. Additionally, for the generation of users who have matured with technology and are technologically savvy, the convenience of world-wide-web resources makes traditional approaches to reference seem outmoded, pedantic and irrelevant.

To appeal further to this 'net generation,' libraries have also begun to experiment with the use of gaming technologies such as 'Second Life' for reference service delivery. As libraries embrace more of these newer virtual technologies it would appear that the demise of face-to-face is imminent or at best reduced to second class citizenship. But, this is the reality of libraries in first world countries. It is not, however, the reality for libraries in many developing countries. While most libraries in the Caribbean have introduced technological solutions to their services, these are to be found primarily in their technical service functions. These solutions range from fully integrated library systems in some cases to discrete aspects of the technical service function in others. Some, mainly in the academic and special library environment, also provide access to online subscription databases. However, the use of the technology has not extended to the provision of reference services and consequently Caribbean libraries have not yet "blown up the reference desk," nor is this ever likely to be a feasible proposition for the continued development of reference services in the Caribbean.

Focusing on an academic library in the Caribbean, this paper will explore issues such as the differing information research skill levels among students and how these influence the nature and scope of library services, physical format of the library collection and the relationship of this to satisfying user needs, and the un/availability of the requisite professionals to staff extended reference services. It will also reflect on how oral societies such as those in the Caribbean relate to the virtual environment. The discussion will juxtapose these issues with the perceived benefits of providing reference in this new virtual mode and contends that, despite the benefits of some technological solutions, conditions in the local environment sometimes preclude their adoption.

Reference Service in Context

Historically, the purpose of reference has been to provide instruction on how to use the library, provide answers to user queries, assist users in the selection of resources and promote the library and its services within the community (wider or organizational). Associated with this purpose is a set of core service values—accuracy, thoroughness, timeliness, authority, knowledge, access and individualization (David Tyckoson 2001). Over the years, there has been much debate on how these values impact on the model of reference service adopted by the library. The debate has centered on two models, that of instruction versus answering factual questions. According to Tyckoson (2001), the instruction or service model privileges education over information. Referred to as the 'conservative model', the focus is on the process of finding information as opposed to information itself. The factual answers model, commonly referred to as the 'liberal model,' stresses information over the process and hence the role of the librarian in this model is to find accurate and authoritative information to answer the user's query, not educate him/her on the process. While these models represent two extremes, in the past most libraries have been able to provide a service which was representative of some combination of these two positions.

However, as libraries begin to expand their use of technology to the delivery of reference services, a preoccupation with catering to a specific user group appears to be the overarching factor which has influenced the newer models of reference services currently being offered, as well as promoted in the professional literature. Fuelled largely by the belief that the reference librarian is near extinction because of the

information-seeking habits of the millennials, reference services in the virtual world appear to be adopting many of the commercial aspects of e-commerce, as evidenced by the call centre model. But while this model has been successful in answering customer questions in the business environment, one can argue that developments such as these within the context of academia have the potential to devalue the academic research process and depress intellectual growth and enquiry. This model can convey to the untrained and inexperienced user of the academic library the misconception that there is no difference between information-seeking behaviour for social and recreational purposes and that for academic purposes. And, this speaks to the inherent differences between public and academic library reference work, differences which highlight the fact that the search for information and the interaction between the patron and the library does not take place in the same cultural contexts.

The primary goal of the university is to build a culture of learning within a discrete community of users through instruction and research, and the role of the academic library is to support the teaching and research agenda of the university. On the other hand, the primary goal of the public library is to foster a culture of service to the whole community and as this relates to reference, the focus of the public library is on providing fact based answers to questions without any obligation to teach the skills of information-seeking. Each type of library is therefore catering to a different community and consequently the needs of that community must inform the model which the library selects to provide reference services. In addition, the national culture in which the library operates must be taken into consideration in the choice of reference service model adopted. The technology of virtual reference software may be culture free, but the way in which users interact with the technology is not likely to be free of cultural influences, and in oral societies such as the Caribbean this becomes a crucial determinant in the choice between the traditional and the virtual mode of service delivery. In the context of the Caribbean academic library, the choice of maintaining the traditional approach to reference is predicated on the fact that this model still meets the needs of the user community, the fact that the nature of our collection precludes the adoption of a service which is completely virtual, and the fact that levels of staffing mitigate against the exclusive adoption of the virtual mode.

Physical Format of the Collection

One of the primary arguments advanced for providing reference services in the virtual mode is the need to take advantage of the technology in order to recapture a lost user base of savvy internet users. The underlying premise here is that the internet has created a culture in which users now expect to have access to whatever help they require without the need to avail themselves of the traditional reference questioning and answering service provided by libraries and librarians. Coupled with this independence is the expectation that the information provided will be in electronic format, so that the whole *raison d'être* for providing reference in the virtual mode has become inextricably linked to having access to both electronic resources available through subscription databases and to digitized collections within the host library. But, it is not likely that all content within the library is going to be digitized and librarians who are providing digital reference as part of their suite of reference services in the virtual mode will have to make tough decisions as to whether they are going to recommend the most appropriate or the most convenient source to the user, recognizing that content and level of treatment are also critical factors in the process.

For academic libraries such as the library of the Cave Hill campus of the University of the West Indies in Barbados,¹ there is no urgency to take advantage of the technology to provide reference services because of declining gate counts. In order to stem this decline, Ann Lipow (1999) views digital reference as an opportunity for the library to promote its print collection. It is her belief that if libraries fail to offer services that cater to their users' new ways of seeking information, then they will be contributing to the "decline in the use of the library's paper materials." But while that statement may resonate with librarians in first world libraries it is not the same for academic libraries in the Caribbean. Many Caribbean tertiary level students are not unlike their counterparts worldwide in their preference for the internet as their primary research tool; however, the reality is that they cannot produce quality research papers without using the library's print collection during their three years at the university. And, this is because the library's print Caribbean collection provides the most comprehensive and authoritative information on Caribbean culture, literature, history, society, economics and sciences. This type of information is critical for both undergraduate and graduate levels because faculty expect student research and assignments to reflect Caribbean realities. At the same time, the problem of insufficient physical space to cope with an expanding collection may be considered an ideal opportunity to embrace digitization as one possible solution for limited space. However, the costs associated with digitization, and the costs of being able to migrate as platforms change do not make this a feasible solution in the foreseeable future. Coupled with the cost of acquiring the rights to digitize Caribbean materials, this option is currently beyond the financial resources of the University.

Further, because our users must engage with the print collection and interact with librarians in a face-to-face mode for research assistance in using this collection, the library is helping to fulfill its educative mandate of ensuring that students pursue knowledge to facilitate in-depth learning rather than just providing access to information to complete assignments. While the journal literature enables the student to investigate an idea in detail, books are critical for providing the theoretical framework which will help the student to understand and interpret the research literature accessed through journals. This is reinforced by the findings of a study conducted by Juris Dilveko and Lisa Gotlieb (2002) which sought to determine the extent to which undergraduate students used print resources in their research assignments. While the results of the study indicated that most students did rely almost exclusively on electronic resources, the study also revealed that students recognized that print sources were important to the research process with 54.1 percent starting their research with print books 50 percent of the time. The students surveyed also expressed some reservations about the advantages of electronic books, generally preferring the print because they could consult multiple pages at the same time as opposed to being restricted to the one page at a time feature of the electronic mode. They also felt it was less tiring on the eyes to read the print than to read a computer screen, and that the print book was portable while the electronic copy was only portable if printed and in this context the costs were considered prohibitive. The findings of this study raises questions about what Thomas Mann (2001) refers to as the 'internet centered model,' which in his opinion seems to be one of the "desirable

¹ The UWI serves the countries of Anguilla, Antigua and Barbuda, The Bahamas, Barbados, Belize, The British Virgin Islands, Cayman Islands, Dominica, Grenada, Jamaica, Montserrat, St. Kitts/Nevis, St. Lucia, St. Vincent and the Grenadines, and The Republic of Trinidad and Tobago.

priorities for libraries nowadays.” But the difficulty with this model is that it has the potential to ‘send the message’ that it is not necessary to look beyond what you have access to on-line and the ramifications of this for the quality of the student the academy graduates are especially critical for a generation of users whose mantra is convenience. So, irrespective of local circumstances, whether an academic library in the Caribbean or the first world the realities of how students need to interact with the literature formats in order to ensure in-depth as opposed to surface learning is a critical aspect libraries must consider before making a decision on whether or not to provide reference exclusively in a virtual mode.

In addition to its print collection, the Cave Hill library supports teaching and learning through the provision of access to an extensive audiovisual collection. Because of the oral nature of Caribbean societies the hegemony of print vs. audiovisual is reversed especially as it relates to research in disciplinary areas such as the literary arts, culture, history, and to some extent the social sciences. In the field of culture, for example, calypsos (a musical art form) are an integral part of all Caribbean carnival festivals. These calypsos are social commentaries on the events of the day and represent the views of the masses that are not going to be found in the print medium. Calypsos from any one year constitute what Trevor Marshall (1997), a Barbadian cultural historian, refers to as “auditory newspapers.” These sound texts are reviews of events of the previous year and provide socio-cultural data that is seldom found elsewhere. Both the audio and visual recordings of these songs are a critical research resource for students. Though already in digital format, were the library to be offering a virtual reference service, it would not be possible to ‘push’ any of these resources to a student in response to a query because the many intellectual property and copyright rights which are bundled in these resources would not permit them to be broadcast. Thus, despite the growing ubiquitous nature of information, these characteristics of the library’s physical collection will always require students to continue to connect with the information by being physically in the library. In this context, face-to-face reference can never be replaced wholly by virtual reference.

Student Preferences

The existence of a substantial print and audiovisual collection is not the singular driving force influencing the type of service delivered to our users. In addition to the physical nature of the collection, one also has to consider the characteristics of a student population which has been growing in number and diversity over the past four years. The undergraduate student population has registered a 27 percent increase in the years between 2004 and 2008. Enrollment statistics for the academic years 2006-2007 and 2007-2008 show a total undergraduate student population in all disciplines of 6163 and 6530 respectively (UWI, 2007, 2008). In both these years the part-time student population represented 50 percent of the total. This part-time student population is predominantly made up of older, more mature students who are employed on a full-time basis while the full-time student cohort is predominantly millennials recently graduated from high school or community college.

Each of these age groups possesses different levels of readiness for their academic careers. Experience has shown, particularly in the academic environment, that what matters is not necessarily the question the student asks, but rather the problem which that student is attempting to solve and how s/he can find the appropriate information to do so. Within this context, the search for information, is as Carol Kuhlthau (1999)

indicates, “a process in which a person is actively constructing new understanding from the information encountered...” Therefore, “exploration and formulation within the information search process are essential considerations for developing systems that enable the user’s constructive process.” If one views reference work this way, then it is not simply the students’ preference for using the internet over the library which should inform the decision to privilege reference services in the virtual mode over face-to-face. Equally important should be a determination of the information literacy skill level of students and how proficiency or lack thereof will impact on the service’s ability to satisfy their needs. The university freshman in the Caribbean enters with very little exposure to and knowledge of how to use libraries effectively to conduct research. This reality is due to the virtual absence of libraries in most high schools throughout the region, the absence of qualified professionals in those which do exist, and the non-existence of corporate libraries in both the public and private sector organizations. Against this background, neither the younger nor mature student has had the kind of experience with libraries and using library resources to enable them to adapt traditional research skills to make the transition to the electronic environment. In addition, while the younger students are technologically savvy their older mature counterparts are not, many of them having no computer skills at all.

In the context of an information literacy programme which is currently only integrated into two freshman level courses and an information literacy curriculum which of necessity needs to focus more on the basics, interaction with students at the physical reference desk is an opportunity to reinforce and teach research skills. While one can argue that teaching is possible in the virtual mode, the success of this is dependent on the self-sufficiency of the user and the extent to which s/he is a self-directed learner. For the novice researcher who has difficulty articulating his/her information needs the flexibility afforded by face-to-face interaction with a librarian is preferred. This is borne out by the findings of a pilot survey conducted at Cave Hill in early 2008, the purpose of which was to determine how students used the library and its resources to conduct research and to determine their preferred way(s) of doing so. One hundred and ninety-four (194) students completed the survey and in response to the question “which of the following would you consider the most important/valuable in providing assistance for your research needs?” face-to-face was ranked highest (62%), followed by instant messaging (17%), chat (12%) and email (6%). In determining the prevalence of chat use 59 percent (sub-population 114) used chat a couple of times a week, most days or several times a day. Of this sub-population, 64 percent, despite using chat frequently ranked face-to-face as their preferred mode for seeking help with research. In addition, of the 48 percent (93) who used search engines, subject directories on the web and specialized search engines as their primary research tool(s), 70 percent again ranked face-to-face as their preferred way to seek research assistance. These results are indicative of a strong user preference for the traditional reference service across all age groups of the population irrespective of variable comparisons, and reflect the significance of the oral traditions within our society despite the widespread use of the technology by millennials and older students. Of course, it can also be argued that in the absence of information research skills training prior to entering university, students view these communication media as tools for social networking, 71 percent indicating that they used chat primarily for personal needs, and not for use when conducting academic research, only 4 percent indicating that they use chat for this purpose.

The study revealed that, not unlike their counterparts, 52 percent of students surveyed conducted most of their research at home. However, it is interesting to note that even though 72 percent of these stay at home researchers used the internet as their primary research tool, 60 percent still ranked face-to-face as the most important/valuable method they would use for seeking assistance with research. This strong preference shown for the face-to-face communication is testimony to the fact that technology is not always the best method of communication for every user. In a culture where orality is a central facet of the society, reference is an inherently social process in which the ability to communicate effectively influences the success or failure of the interaction. In this context, even within the Caribbean, a predominantly English-speaking region, challenges of creolized dialects also become integral to the process and hence, non-verbal cues can assume a high degree of significance in these exchanges. In a virtual environment these non-verbal cues are more difficult to read and this inability hinders the librarian from being proactive in anticipating what users may need. This sentiment is echoed in many of the reasons given by students for choosing face-to-face. Some of their comments were:

“it’s more logical to have face to face communication as there’s no misunderstanding.”

“I believe there is no better way to communicate than with the human body.”

“very visual in my processing therefore seeing or direct contact work best for me.”

“talking in person is a more one on one tactic, you really can’t go wrong there.”

“talking in person helps you to get more out of the conversation.”

“it has been proven that communication occurs best when body language and tone of voice can be seen.”

These findings are not unique to the third world experience. Corey Johnson (2004) in a study on chat reference carried out at two universities in the United States, makes the following observation:

“One of the most notable trends this study has exposed is the solid popularity of in-person reference. The vast majority of surveyed university affiliates had used it and similar numbers chose it as their first option if seeking reference assistance in a hypothetical scenario...

Further it was the undergraduates (presumed to be technologically savvy) who were the most likely to choose face-to-face reference.”

If, as Ann Lipow (1999) advocates, librarians were to “become more convenient,” by focusing their efforts on developing a virtual reference service, they could miss the opportunity, given the preferences expressed by the users, to create instead new services within the library. In an environment where an increasing portion of the library’s resources can be accessed electronically, academic libraries need, according to Jerry Pomerantz and Gary Marchionini (2007), to “position themselves not as spaces for materials but as spaces for people.” Moving towards the creation of workspaces that provide individual and collaborative computer work stations where users can have access not only to information resources (electronic and print) but also to reference librarians, technologists, faculty and their peers would be responsive not only to the needs of our users but would also privilege the importance of physical interaction to learning. This new model of service delivery, commonly referred to as

the Information Commons, represents the convergence of the technology with information service provision. It has developed in response to the pedagogical shift in higher education, where learning is now viewed as more of a collaborative process between students, faculty and librarians. This pedagogical shift in teaching along with the increase in class size due to an expanding student population at Cave Hill have seen the solitary research project being replaced by more group research projects. Students therefore need spaces to collaborate with each other and engage with the research material as they study and learn in this new environment. If one juxtaposes the preferences expressed by the user, the information skills of freshmen, the changes to the teaching paradigm, and the evolving role of the library in supporting curriculum changes being made as a result of this, then the importance of using the physical library for research cannot be sidelined because of the convenience of the technology. Rather, the library becomes that physical space which enables access to intellectual resources and the social space where users can interact with each other and reference librarians as they access and use these resources.

Staffing Levels

As with every other area of the library, technology has redefined the skills which reference librarians need to possess and this has created a work environment which is as challenging as it is ever changing. For small academic libraries with limited budgets and small staff complements there are advantages to using the technology to meet user needs. However, the downside of this is that the technology changes so quickly that the ability of librarians to keep pace with these changes depends not only on their willingness to adapt but also on their age. These two are not mutually exclusive and both are critical to an understanding of the Caribbean and Cave Hill scenario. One of the major problems facing the profession in the region is that of an ageing librarian population. At Cave Hill, the majority of the professional cohort is over the age of forty.² The rapidity with which the technology changes, the increasing sophistication of the technology and the need to be always on the cutting edge can be a challenge for this ageing population which outnumbers its younger cohorts on staff.

Currently there are six professional librarians on staff who are expected to provide reference services to a student population of 6530 undergraduates and 739 graduates (UWI, 2008). Of these six, only one holds the substantive post of Reference Librarian; all others, perform reference duties on a release basis during evening and weekend periods. By the commencement of the academic year 2008/2009, this number is expected to increase to thirteen owing to the establishment of seven new professional posts in the library. Even with this expected addition there will still be insufficient staff to offer the level and kind of service envisioned in a virtual environment. Digital reference creates many new roles for librarians, but the question which remains is, 'which generation of librarians will be the most connected?' Irrespective of how technologically savvy the 'baby boomers' are, there will always be some degree of disconnectedness which will impact the ability of the library to be technologically on the cutting edge. Unless there is a balance in the age groups of librarians, libraries like that at Cave Hill, while they may be able to offer a reference service virtually will not be able to deliver the level of service which is expected.

² This is because as a rule, the staff population of Caribbean libraries remains markedly stable.

Furthermore, as the university begins to implement its plans for distance education through its open campus the complement of professional staff will have to be significantly increased. But, the inability to attract new graduates into the profession will affect the university's ability to identify the requisite staff to meet the demands of reference in the digital era and result in added pressure being placed on older professionals to remain technologically up-to-date. Therefore, while the student on the physical campus can have his/her needs met efficiently and effectively through face-to-face delivery, another reality is that despite the unavailability of suitable professionals to staff a virtual reference service, this is a service that will have to be provided in the near future. Given the two diverse student populations, one which is place-bound and overwhelmingly prefers face-to-face, the other, who because of circumstances will need to have some kind of virtual delivery, the challenge will be to find creative ways of overcoming these barriers recognizing that the only constant is change.

Conclusion

This paper has looked at a number of issues that impact on the use of virtual tools to provide reference service to Caribbean tertiary level students. Among the issues examined were student preferences, the oral nature of Caribbean societies, technological realities, costs and staffing. A pilot study, conducted reaffirmed the need to continue to offer reference in the traditional mode. However, there is no disputing the benefits that can be derived from providing reference in a virtual mode. It is the preferred service for the techno-literate who value the convenience of being able to seek assistance in real time. It provides opportunities for the equally techno-literate librarian to be present in the virtual world. It caters to the user who prefers anonymity. Ultimately, reference in the virtual mode keeps the library on the radar of these users and many in the profession consider this service to be critical for the continued relevance of both the library and librarians. However, not all users are techno-literate and not all queries can be responded to effectively in the virtual mode. Effective communication drives the reference transaction, and in the computer-mediated environment there is difficulty in perceiving, reading non-verbal cues, building relationships, and instructing—all of which can affect the librarian's ability to meet a user's needs effectively.

The concept of the Information Commons changes the role of the reference librarian from a reactive to a proactive one, and as librarians encounter inexperienced and impatient students who are not clear on where to begin their research, instruction has assumed greater significance. In the Commons model the physical and the virtual worlds converge and this creates an environment where the librarian gets the opportunity to serve all types of users. The model has the added bonus that any user who begins his/her conversation in the virtual mode but encounters an insurmountable problem in this space can easily and without great displacement switch to the physical.

These two modalities are not mutually exclusive as reference is not a commodity which can be packaged and marketed to a homogenous group of users. Reference is a service in which the individual must be given precedence over the service per se because every library user will have unique needs. The technology in this context is simply an enabler and despite the ability of the virtual reference software to facilitate such sophisticated features as co-browsing, the 21st century reference librarian will

always need to integrate print and electronic resources. Therefore, for the foreseeable future the physical library and the physical reference desk will continue to be integral to the provision of reference services especially for academic libraries in the Caribbean.

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