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# California Statewide Reference: A Design Proposal

## Rethinking Reference Pasadena, California

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*“Bring to bear the willingness, capacity, and ability to continue to morph into ever-relevant, evidenced-based new iterations of service.”*

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# Last Time...

- September 14, 2006
  - Project Background and Methodology
  - Outcome: Design a new model for statewide reference
  - Timeline: August 2006 – June 2007

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# Today...

- Proposal presentation and feedback
- Supplemental background handout
- Review project status and next steps

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# Tomorrow...

- From Web 1.0 to Web 2.0 and beyond
  - Web 1.0: email, websites, search engines, and surfing
  - Web 2.0: Interactivity, conversations, interpersonal networking, personalization, individualism
  - Web 3.0: more distributed in form, web services, the semantic web...who knows?
- Library 2.0
  - how to use the Web 2.0 opportunities in a library environment
- Librarian 2.0
  - Understands end users
  - Is where the user is, when the user is there

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# Librarian 2.0\*

- Connect people and technology and information in context
- Connect users to expert discussions, communities of practice and participate there as well
- Embrace non-textual information and the power of pictures, moving images, sight, and sound

*\* Out Front with Stephen  
Abram: A Guide for  
Information Leaders, ALA,  
2007*

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# Proposed Design: A Pathway...

- Out of the “box” you are in
- Into a transitional model that improves service now and repositions CA for future reference
- And toward an evidence-based package of services that serve Californians well into the future

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# Out of the Box

- ❑ Declining volume of CLSA reference questions
- ❑ Perception that “reference is dead”
- ❑ What to do about CLSA reference centers and staffing
- ❑ Virtual reference issues: staffing, quality assurance, questions of a local nature, technical problems, public appeal, cost benefit
- ❑ Database cost vs. use
- ❑ Leadership void re: web-based service development

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# Into A Transitional Model

- ❑ An improvement over what you have
- ❑ Establishes a platform for fashioning successive model iterations
- ❑ Repositions CA for an enterprise model in contrast to a static model
- ❑ Delivers service as well as planning and leadership
  - Data collection, analysis, benchmarking, needs assessment
  - Market research, applied research that would establish what would actually fill a niche
  - Customer-driven
- ❑ Finds that intersection of what you do really well and what the public wants and validates the data
- ❑ takes better advantage of the opportunities that are presented now and into the future

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# Toward An Evidenced-based Package Of Services

- ❑ Conduct ongoing market research
- ❑ Clearly define the niche
- ❑ Make data-driven choices
- ❑ Properly package those services that are viable
- ❑ Emphasize customer-centered outcomes
- ❑ Create tools that help the consumer be independent
- ❑ Consistently deliver professional work
- ❑ Make the information usable: customized, personalized, collaborative, with a feedback loop
- ❑ Include focus on high profile targets: e.g., child development, gang prevention, health & wellness

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# Model Components

- A single virtual Portal for CA public and CA librarian question “sessions” (e.g. CA Answers)
- A single CLSA reference service plan
- A manager/administrator for cadre of services (sessions, document delivery, product development)
- A designated leader or leader team to steer the development agenda

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# HOW TO GET THERE

- Start by analyzing whether state funding of reference (CLSA) could support the transitional model
- Think in terms of a 3-4 year time horizon
  - In ever-transitioning phases of development
  - CLSA, LSTA, and public/private/corporate funding partnerships
- Bring to bear the willingness, capacity, and ability to continue to morph into ever-relevant, evidenced-based new iterations of service.

*The ability to morph is what protects the investment!*

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# ...AND WHAT LIES BEYOND

- Enterprise model – much more nimble
- Customer driven, Web 2.0 and beyond
- Recognizes libraries are but one part of the information equation
- Based on professional judgment not rigid procedures

# TRANSITIONAL MODEL ESSENTIALS

## ■ Leadership

- Planning: data, assessment, benchmarking, Market research
- Coordination, integration, evaluation, reintegration
- Drive agenda for development; Development/Funding partnerships

## ■ Management

- The transition has to be managed
- Quality Assurance, Customer Care
- Marketing, publicity

## ■ R/D, innovation, experimentation, incubation

- Web-2.0 and beyond
- Project-centered
- Bring best practices and research to bear
- Local, national, international collaboration

## ■ “Reference” Services

- Customer sessions: question defining, coaching, guidance, answers, follow-up, follow-through
- Good customer service, accuracy, timeliness, cost-effectiveness
- Database support: databases and database help for customers; document delivery

## ■ Training

- Transcript analysis and feedback, accountability
- Desired outcomes to InfoPeople

# “CA ANSWERS”

- Provide a Single Portal for CA Public and Librarian “sessions”
  - “California Answers” icon on CA libraries and State Library websites, etc.
  - Intake method = email, chat, IM, telephone, fax, other
  - Continue with OCLC QuestionPoint software for now
  - track developments, i.e., other vendors, products, experimentation with open source option
  - Refer questions needing more research to complex folder for 24 hour turn-around or according to client timeline
  - Coordinate protocol for questions requiring the collections of LAPL, San Diego, Fresno, San Francisco, etc.
  - Use “any and all means” to meet desired outcomes
  
- Desired Outcomes
  - Good customer service, accuracy, timeliness, customer care
  - The customer wants an answer not a lecture
  - Not making the customer feel dumb
  
- Use various staffing options to achieve the desired outcomes
  - Staff with CLSA Reference Personnel, virtually
  - Supplement with contract personnel, CA Libraries, commercial services, etc.
  - Use successful CLSA Reference practices: e.g., host relationships, subject and location stringers
  - Train and select personnel for the desired outcomes
  - Customer service skills, age-related skills, efficiency skills, content skills, referral skills
  
- Uses Selected databases (e.g. LAPL, other non duplicative)
  - Provide document delivery
  - Possibility of public databases with federated searching

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# HOW IT WOULD WORK AT THE START

- Public accesses *CA Answers* by telephone, fax, email, chat, instant messaging, etc.
- CA Librarians access is through the web Portal
- “Sessions” include clarifying, consulting, coaching, guiding, answering, referring, follow-up, follow-through
- Sessions with clients through the Portal are managed virtually with *QuestionPoint* software
- Staff resourcefully improvises
  - “Toolkit” includes option to use online services
  - Exercises professional judgment within an established framework
  - Established framework is under continuous improvement
- Complex questions handled by *CA Answers Follow-Up Team*
  - *Handled side-by-side with other questions*
  - *Uses resources of the LAPL, other libraries, stringers, commercial services*
- *CA Answers staff have access to First Source databases*
  - *Provide document delivery to client*

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# TRANSITIONAL “AGENDA”

- Better understanding/incorporation of user needs, preferences, and behaviors
  
- Quality improvement across-the-board
  - Evaluation, i.e., data, metrics, value for decision-making
  - Effective communication and relationship-building
  - Marketing and public relations
  
- Development in a Web 2.0 environment:
  - Interactivity, social networking
  - Diverse learning styles
  
- Service development priorities
  - Underserved, e.g. English language learners, print-impaired
  - Informed by customer input, market research

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# ORGANIZATIONAL STRUCTURE

- Consultant Leader or leader team
  - Change management
  - Planning/evaluation/research
  - Advocacy, development/funding partnerships
- External Sounding Board group
- State Library Contracts w/provider to Manage CA Answers (e.g., MCLS)
- CLSA Systems continue to pay Reference Center Personnel

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## HOW IT WOULD BE FUNDED

- Investigate using CLSA Reference allocations as the base of funding for the proposed model
- Use LSTA funds to enable the leadership and development agenda
- Use grants and partnerships to advance the development agenda
  - languages other than English
  - print-impaired
  - and other special needs

# CURRENT FUNDING SNAPSHOT: POTENTIAL FOR REALLOCATION

Summary: 2006/07 Reference Funding		CLSA	Local	LSTA	Grand Total
CLSA Reference: Personnel		\$ 890,000			
contract services, database subscriptions, other		\$ 410,000			
local funds for CLSA Reference			\$ 300,000		
First Source	LAPL databases			\$ 313,500	
QuestionPoint/24/7	software and network			\$ 200,000	
Totals 2006/07		\$ 1,300,000	\$ 300,000	\$ 513,500	\$2,113,500

- Right-size CA Answers staffing over time as appropriate
- Local contributions can continue to pay for regional databases, voluntarily contribute to local Web 2.0 services development, or be reclaimed by local libraries or some of each
- OCLC costs could be reduced and or redirected into “initial agenda” projects

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# WRAP-UP: OPPORTUNITY!

- Reference as we have practiced it may be dead, but the possibility of transforming it is very much alive.
- A new reference agenda could refocus and re-energize, take it to a new level
- The proposed approach leverages the long-term “gains” of the CLSA Reference Program
- Current reference staff can play a pivotal transitional role in transforming services
- All three service elements can be improved (next level reference, virtual reference, databases)
- CLSA funds may be repurposed to do this, along with other funding
- While moving ahead, the model/cost can continue to be examined, rethought, improved, morphed

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# PROJECT STATUS

- Remaining to be done by Consultant
  - April-May: Refine design
  - June: Final Design

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# Questions and Comments