

Observation 2: Virtual versus Traditional Reference

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This paper aims to examine the contemporary reference interview. While reference has historically and traditionally taken place in a library through an intimate interviewing process the virtual interview, conducted through email correspondence or through live online chat, has exploded as a popular alternative within the past decade. This examination will be conducted in three parts: a summary of interaction by the author in a participation of both virtual and intimate interview, a comparative study of both, and finally: what the literature has to say about a few of the issues surrounding such media. Transcripts of the author's participation as a patron in a virtual reference view will be provided for the reader's consideration. For purposes of this work the author participated in reference interviews at Patchogue Medford Public Library in New York, as well as Fordham and Georgetown universities virtually.

Interactions

The author's reference query focuses on the topic of the relationship between the religion of Buddhism and the ancient Hellenistic philosophy of Stoicism. While the author is genuinely interested in such a topic, he also considered selecting it as a research topic in a research methodology class, giving authority to the reasoning for such a query. Specifically an attempt at locating records which demonstrate a historical, rather than merely comparative, link between the two subjects was attempted. It must be noted that there was an element of deception or roleplaying in the interviews, as it is assumed that anyone using the virtual reference desk is a student or alum at the schools, to which the author is not. As we shall see, when the author revealed that he was querying for purposes of this study, the response was quite different than an assumption on the basis of genuine research interest.

The in person reference query at Patchogue Medford Library was conducted on March 17th at 3 PM. Like most weekdays after 2 PM or so, the library was teeming with school children and families at the front of the library facing Main Street and a modest number of adults reading at tables in the central hall. The author moved to the back of the library and approached the reference desk. There were a few librarians manning the desk, although all seemed involved in work of some sort, typing and fixated to their computer screens. What follows is a reconstruction of the exchange at the desk, although paraphrased:

Author: "Hello"

The librarian, a male probably in his early 30s, bespectacled and with a thinning hair line, looks up and smiles

Librarian: "Hello, my name is Peter, can I help you with a reference question?"

Author: "Hi, yes, I am looking for information on the historical relationship between Buddhism and the Hellenistic philosophy of Stoicism."

Librarian: "Can I ask: what is this information for?"

Author: "It's for a thesis I'm writing, I'm a graduate student. I'm trying to investigate the relationship of Buddhism and Stoicism."

Librarian: "Ok, no problem. What sort of things have you looked into so far?"

Author: "Well, I know about Buddhism and Stoicism, have read up some obscure references and comparative stuff, but nothing that gives proper treatment of the subject in historical context."

Librarian: "So if I understand you correctly you would like information which shows the historical connection between Buddhism and Stoicism?"

Author: “Yes”

Librarian: “Ok – are you interested in primary or secondary sources?”

Author: “Preferably primary sources, like an ancient text containing coverage of both topics, but I will literally take anything I can get – I was unable to find much. I just need a solid stepping off point. ”

Librarian: “Where did you search before?”

Author: “Google Scholar, Google, wasn’t able to find anything good.”

Librarian: “I can help you. Let’s start by searching the library catalog, have you ever used it before?”

Author: [lie] “Can’t say I have.”

[2 minute lesson on how to use the Library catalog from the website]

From this point the librarian locates a few general histories of Buddhism in the library collection, and a few ancient Stoic writings, but nothing specifically appropriate to the reference query within the internal library collection. He offers to order a volume from another library nearby, the author declines because his library card is not current and he has no desire to renew it. The librarian goes on to find the same articles later cited in the virtual interview by consulting an online database connected to the Patchogue Medford Library system.

Librarian: “You can find the articles by using our website, the same way I showed you before. I think they will be a good start for your research. I also wanted to refer you to a few experts who may be of help at Stony Brook University.”

[he proceeds to print out a few URLs to several professors web pages at SBU]

Author: “Thanks, I think that about covers everything.”

Librarian: “Glad I could be of help. If you change your mind and would like to take out those books through loan feel free to call, email or visit and we’ll be sure to order them. It only takes a few days, it’s no big deal. Is there anything else I can help you with today?”

Author: “No, thanks, have a nice day.”

Both virtual reference interviews were discovered from the Association of Jesuit Colleges (AJCU) and Universities website under “AJCU Virtual Reference.” The latter is a portal to various Jesuit colleges which allows a visitor to fill in his or her name, email and reference question, and then connect to a librarian from any of the Jesuit colleges and universities. The author chose Fordham and Georgetown out of an awareness of the strength of their liberal arts, history and classics programs. In this regard the author selected libraries which would perhaps be best suited to answer the reference query.

From the AJCU Virtual Reference portal a separate web page loads which mimics many popular online chatting programs, including a common chat area, a chat bar and a separate area with details on the users currently connected (specifically: the “provider” and the patron). What follows are the transcripts from the author’s interactions:

Fordham

*** Please Note: All sessions are recorded for quality control ***

You: What has been the impact of Buddhism on the philosophy of Stoicism?

Cathy S (Provider): Let's see if I can help you with that.

You: Thanks so much

Cathy S (Provider): Is this for a research paper?

You: It's actually for a SLIS class, we're tasked with comparing virtual reference with in person reference

You: so it's for a paper of sorts, but not particularly on the topic

Cathy S (Provider): Thanks for the honesty. I'll admit that this was not a question I wanted to tackle virtually.

You: So if someone came with a question like that, and it was for research, what would you say?

Cathy S (Provider): It's a broad topic. I'd try to elicit the level of knowledge the

researcher had on each of the key concepts (Buddhism & Stoicism)

You: I guess to clarify my inquiry, i'm specifically interested in records which demonstrate a link between Buddhism and Stoicism

Cathy S (Provider): Frankly, that would be easier in person.

You: Understood

Cathy S (Provider): Then I'd suggest encyclopedia articles on each if I thought we were starting at square one.

Cathy S (Provider): If more advanced I'd start some database searches (guided) with Jstor or maybe ATLA.

You: Understood, thank you for the info

Cathy S (Provider): The catalog at Fordham by the way has no matches for Buddhism Stoic or stoicism

Cathy S (Provider): I might recommend Google scholar as well since info could be under several disciplines.

You: Yeah, i'm actually a Stoicism expert of sorts, and I know the two existed in the same areas at the same time, they must have had a relationship, but it's not something really studied

You: Was hoping you could dig something up I was unable to find

Cathy S (Provider): I'm not so I'd be playing alot with key words.

Cathy S (Provider): What did you use already?

You: Not much, essentially Buddhism and Stoicism

Cathy S (Provider): Those two words bring up significant results in Google scholar. One is from Jstor. Do you know how to search there?

You: Not really

Cathy S (Provider): [URL > http://www.library.fordham.edu/](http://www.library.fordham.edu/)

Cathy S (Provider): Let's start at the Library home page. Link above.

[Cathy goes on to explain how to use JSTOR at the Fordham web page]

You: thanks for your time; I must be going

Cathy S (Provider): I get 400 results when I use your keywords. That will probably get you started.

You: I will try that, thanks

Georgetown

*** Please Note: All sessions are recorded for quality control ***

You: What has been the impact of Buddhism on the philosophy of Stoicism?

Hoya Librarian (Provider): Hi.

You: Greetings

Hoya Librarian (Provider): Can you tell me a little more about your project? What you've looked at so far and what you're hoping to find? I don't want to repeat what you've done...

You: I am specifically looking for primary evidence that demonstrates a link between Buddhism and Stoicism - and/or secondary records on the topic of the relationship between Buddhism and Stoicism

You: What i have done so far is: I have a knowledge of Buddhism and Stoicism

You: I do not have a knowledge of the relationship between the two

Hoya Librarian (Provider): Ok

Hoya Librarian (Provider): What class is this for?

You: It's for a research methodology course

You: We have to research any thesis

You: im trying to explore the relationship of buddhism and stoicism

You: I have looked for books specifically on this topic and was unable to find anything

Hoya Librarian (Provider): I understand. I'm trying to get a sense of how much information you need and what perspectives you're seeking. You will want to look for books in GEORGE--I'll test some search terms, and articles from Religion Index and Philosopher's Index.

You: thank you

Hoya Librarian (Provider): Just a moment...

You: to clarify: i want ANY information on this topic

You: I have been unable to find anything

Hoya Librarian (Provider): OK

Hoya Librarian (Provider): still working...

Hoya Librarian (Provider): <http://catalog.library.georgetown.edu/record=b2476349~S4>

Hoya Librarian (Provider): This is a comparative study between Greek and Indian philosophies...might help you get started...

You: hrm

You: excellent

Hoya Librarian (Provider): let me check some article databases...

Hoya Librarian (Provider): ATLA Religion Database shows some promise...

Hoya Librarian (Provider): Wong, David B. 2006. "The meaning of detachment in Daoism, Buddhism, and Stoicism." Dao (Binghamton, N.Y.) 5, no. 2: 207-219. ATLA Religion Database

Hoya Librarian (Provider): Here you can see that the author selected an aspect of stoicism and Buddhism to compare...

Hoya Librarian (Provider): You may have to separate different elements also: enlightenment, etc.

You: Can you find anything which is more historical rather than comparative?

Hoya Librarian (Provider): You mean that Buddhism influenced Stoicism?

Hoya Librarian (Provider): Let me check the Classics database, L'Annee Philologique...

You: or vice versa

You: but I am looking for some demonstrable way in which Buddhism had a relationship with Stoicism in history

Hoya Librarian (Provider): OK. Let me check...

Hoya Librarian (Provider): The Classics database is not working at the moment... let me try another approach...

You: understood

Hoya Librarian (Provider): I'm not finding anything so far--checked Philosopher's Index, Dissertations & Theses, and Bibliography of Asican Studies.

Hoya Librarian (Provider): You could try looking at histories of either Stoicism or Buddhism (books) and see if there's mention of influence either way in their development.

You: Ok no problem, I figured as much

Hoya Librarian (Provider): Have you spoken with your professor?

You: No but its for thesis research, I doubt he would know much about this

You: ill just have to email some PHDs

Hoya Librarian (Provider): Fr. Hooper is the librarian for religions, his contact info is on the Religions guide:

http://resources.library.georgetown.edu/libdata/rqs.phtml?core=1&from=rbs&subject_id=95

Hoya Librarian (Provider): He may be able to assist.

You: thank you

Hoya Librarian (Provider): found this: http://www.worldcat.org/title/stoicism-of-epictetus-and-early-buddhist-thought/oclc/231853948&referer=brief_results

You: Oh excellent

You: It's a BA thesis but better than nothing, I think there is very little to no research done on this topic

Hoya Librarian (Provider): I think that's about all I can do....perhaps talk to your professor about how things are progressing.. he/she should be able to advise.

You: yes, thanks very much, have a nice day

As the reader might note, in both cases a negotiation occurred mainly due to lack of precision in the author's query, not unlike more traditional in-house reference. While at Fordham the response was standoffish when the author revealed that the intention of his query was for purposes of this study, Georgetown's librarian was very intent to exhaust all resources to answer the question, even while at the end of the interview. It is interesting to note that the first resource referenced by both were the internal collections of the libraries. Secondary measures were, for both, keyword searches into article databases. With internal resources exhausted (not surprisingly, considering the obscure and scantily researched topic of the query), both librarians referred the author to external resources, either outside of the library or outside of the institution entirely.

It is curious that Fordham's librarian was reluctant to answer this sort of reference query virtually, stating that she would prefer do so in person. This hints at a general lack of interest in conducting complex interviews online. It is possible that email reference, wherein an immediate response is not required, would serve complex virtual queries

more effectively, although that topic is outside the limited scope of this paper. Here we observe the constraints of live chat and the social demands of a real time exchange; much like the reference desk interview, a patron cannot be expected to hover for an hour or even fifteen minutes without a response, while reference by correspondence, although less responsive and interactive, offers that luxury.

Comparison

The amount of time involved with both styles of interview varied. It took about fifteen minutes to conduct the interview at Patchogue Medford and it was slightly quicker during the virtual sessions. The author attributes this to the speed of communication in virtual sessions and the excision of language and social formalities from the equation. The interview took longer in person because synchronous communication is impossible verbally and a personal conversation is taking place, while there is always a distance in virtual environments. While the virtual reference was quicker, it was not so much quicker as to completely outclass the in person reference. The brevity of the interview at Patchogue Medford may also be attributed to the author's general disinterest in continuing the interview after it became apparent that the library could not offer much in the way of records. A conscious attempt was made to disengage.

As a matter of convenience virtual reference clearly has the advantage. While Patchogue Medford Library is close to my house, the author does not have a car, and had to walk about a mile and a half. While going to a library to conduct an interview requires an effort and planning, virtual reference may be instant, seamless and interactive. One might visit five or six interviews in an hour virtually, while this would not be possible in person. A multitude of organizations can be reached virtually, with little strain put on

personal resources or the resources of the librarian with virtually the same services offered. The author did not partake in a live reference interview until the time of this study, and will not likely do so again in the foreseeable future, choosing instead to consider the best possible library for reference tailored to the query at hand and then virtually initiating reference.

One clear drawback to virtual reference as opposed to traditional reference is that there is rarely a human element involved. The author suspected that he was aggravating the librarian from Fordham, perhaps even angering, but had no real evidence to believe so other than a lack of engagement on the part of the provider. A librarian can perceive struggling, confusion or other emotional cues from a patron in order to better refine the search query – this is more difficult in digital environments. The ability of sight is perhaps most important in more general queries in which the librarian really has to take an effort to understand the angle of inquiry, and is perhaps less pressing in a query similar to the authors' due to the technical specificity of the question.

In both styles of interview librarians drew upon similar resources in a nearly identical chronological contingency: internal catalogs, intra-library catalogs, affiliated databases and exterior databases and extra-institutional allies. In this manner the virtual reference interview appears to have been adapted from standards originally created for interviews in the flesh; the standard procedure applies. Not only in this technical, information discovering sense, but also in convention of communication as we have seen before.

The ease of communication and the nature of the “back and forth” in both styles of interview were quite different. At Patchogue Medford the communication was more friendly and personable, while in the virtual sessions it was more formal and task

oriented. This is not to say that the reference interview at Patchogue Medford was casual, only that there was more verbiage and pleasantries exchanged, while in virtual sessions there is only the task. Perhaps the ideal way to demonstrate this contrast is in the tutorial given by the librarian at Patchogue Medford versus the Fordham librarian. At Patchogue Medford the librarian took his time to carefully explain how to use the library catalog, scanning the author for comprehension and explaining all the features at length, often with the inclusion of caveats. The Fordham tutorial was task-oriented solely to locating JSTOR and using it to perform a basic keyword search for the query at hand. There seems to be more of a vested interest in the patron while in person, at least in this individual experience, while the virtual interviews are more distant and cold. This is a downfall of the medium.

Analysis

One important point the author discovered while undergoing the reference was the notion of wasting the librarian's time and also the sense that the author could very well perform the same searches and activities and probably more effectively. The research seems to at least provisionally acknowledge this fact.

Coffman and Arret (2004) make the argument that real time chat reference is expensive to maintain, ineffective when compared to traditional reference and fundamentally unsustainable, claiming that many libraries have adopted it out of mere fad power rather than reasoned purpose. While the former argue that live online reference suits specific needs, it rarely functions as well as the alternatives in a general reference function. While Coffman and Arret maintain that "if librarians had all the money in the world, it might not matter," they conclude that attributing precious funds to online

reference often detracts from more commonly used modes of reference. Furthermore, Coffman and Arret offer three alternatives: phone reference, email reference and self-service.

The phone has several advantages. First, it is immune to the prominent issue in contemporary librarianship of the “digital divide,” libraries already have the technology in place to take the interviews and librarians do not require special training, studies indicate that the interviews can be conducted much quicker by phone as opposed to other digital means and the tedious need for “netiquette” is neutralized. Coffman and Arret contend that while remote service is essential, a more practical and economical form of remote service is by phone, especially in an age in which the vast majority of adults have access to cell phones.

More appropriate for purposes of this paper are email and self-service. Email is advanced over live chat reference due to its economy: it requires no special training, no dedicated separate reference desk hours, no special chat programs and there is no need for exceptional or disruptive integration into a librarian’s daily work. Furthermore, and this really appeals to the author’s experiences: email reference allows librarians to ponder questions and answer them more thoroughly; there is no on the spot demand for a response. Coffman and Arret suggest that only 30% of online reference is done through email, but this is most likely due to the poor turn around rates of libraries (recently confirmed in Olszewski 2010 as averaging 3 weeks for most queries), not an inherent flaw with the medium.

Lastly, and this has the most applicability to the author’s experiences, chat reference becomes a moot point if self-service capability and infrastructure is improved.

Coffman and Arret cite the example of Google and Amazon, two commonly used information retrieval systems, citing that these systems effectively answer most queries effectively and without a live chat component. This is due to the heuristic sophistication of the software, the high standards of engineered interactivity and the empowerment it grants to the end-user. Rather than force the user to become dependent on our intervention, so implies Coffman and Arret, we might redirect the costly expenditures we dedicate to chat reference on instead improving our library systems and teaching proper information retrieval techniques. The author agrees with this latter point – at no point during the sessions at all three of the libraries were the reference services essential; the author could have done what the librarians were doing himself, and probably better. What would have been perhaps much more useful to the author would be a long email with various resources to consider rather than a complaint that such queries were incompatible with online reference.

A recent case study by Breitbach et al (2009), while acknowledging the expense of online chat reference also debunked the notion that the expenses are inherent to the system. Free services such as Meebo, which integrate with popular instant messaging software and even greater access at no additional expense to the library, essentially make moot the point that online chat reference is an expense which cannot be avoided. Of course, we cannot fault Coffman and Arret in this regard, because they were writing before the existence of such services. Regardless Breitbach does not address the other concerns of Coffman and Arret and the alternatives proposed remain valid even in the face of reduced expense of virtual reference services.

The sort of lackluster service provided by the Fordham librarian is actually statistically represented. A 2010 survey (Connaway) found that 45% of the people surveyed had negative experiences with online virtual reference: often their questions were not answered; they were cut off abruptly, re-routed to basic databases or simply presented records which the searcher had already found on his or her own through a basic Google search. This is typical of the author's feelings on the topic; there was never a sense of having been assisted in any real way by Fordham, although Georgetown did manage to dig up some obscure records which the author was unable to find after an initial quick internet search. These gripes invoke the need for more deliberate reference work.

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