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The Role of Reference in Discovery Systems: Effecting a More Literate Search

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We at Georgetown are beginning a “Research Across the Curriculum” initiative. This initiative comes on the heels of a “decoding the disciplines” initiative that superseded a “thresholds of writing” initiative and, a bit further back, a “writing across the curriculum” initiative. I think you get my point. But beyond the humor in this, what these serial initiatives show is the fundamental desire faculty and administrators have that students learn to think, and think critically, about what they are doing.

John Buschman, who you may know from his work on libraries and the public sphere, has an excellent recent article that pokes a bit of fun at our fretting about “information literacy,” because it is really not that new. In the end, he suggests “Critical Reflexivity” is the principle concept underpinning all the illiteracies we’ve tried to eradicate. Now, I am an anthropologist by training, so I do know these two jargon words “critical” and “reflexivity” have been overused to near uselessness, but that’s John’s term, and I think you can see the connection.

What we librarian and educators have continued to want is thinking and, if we’re lucky, meta-thinking and maybe even self-awareness.

I believe all of the vendors of the so-called “discovery layers” have good products—they do things we’ve wanted to do for years and are somewhat amazing, even possibly overwhelming, in what they can deliver back from a single search. However, is the researcher paying attention?

Don’t we still want them to have to necessarily think and learn, and maybe there’s still something to teach? No discovery layer mitigates that mission.

Besides, what do we really know about how researchers really work? (I am explicitly not talking about “known item searching”—that’s finding, not discovery. I am leaving off here discovery of ‘hidden collections’ as well.)

It is for these reasons that I have been asking all the discovery layer vendors I have seen to tell us about

their user studies. I don’t mean “usability” here—that is how customers respond to presentation. I mean user behaviors—the disparate, subject, age, gender, task, and learning-style differentiated clusters of behaviors inquirers engage in as they explore. I am Chair of the Washington Research Libraries Consortium Discovery Layer Task Force and that’s what I have (also) been asking my colleagues at the eight institutions in the consortium to consider as a crucial element in our choice—the extent to which the vendors have already conducted research and the extent to which they are committed to continuing to do this work with us.

And that’s what I’d like to have you focus on here and have you consider as you listen to the very short presentations. This is what I would have you remember when you go back to your local programs and libraries.

What exactly do we mean by “discovery”? What do we really want from (what can we really expect from) “discovery layers”? And what do we really know that makes us so sure we know what we mean and what we want?

There’s a kind of hyperbole here in the word “discovery”; something we’re so used to—perhaps from advertising—that we don’t even see it any more.

If we were really to investigate “discovery,” we ought to consider people like Popper, Kuhn, Leibnitz, Russell, and, more recently, Bruno Latour (who has an interesting concept of “circulating reference”.) Or we might consider discovery historically, as in Daniel Boorstin’s *The Discoverers*—world geography, time & cosmos, and science.

We also might think of our own traditions of “discovery” in the old days as in Barzun & Graff: *The Modern Researcher*, p. 76, 1970 edition:

“It follows from all this that the reference shelves of the Library are the real training ground of the researcher.”

We don't have time here, but it's something to look at as we consider "discovery".

But, while we're here, most practically, just for a moment, what should we consider as an expectation for the library user and for the library?

I have the feeling that what we really want is "concerted exploration". What we (academics, at least) are really trying to foster is curiosity, and I have a very strong suspicion that reference can play a key role here.

Reference used to happen with books—dictionaries, encyclopedias, bibliographies, card catalogs, and browsing. And it still happens, all the time, on the web—you know all the places. That's where "discovery" is really happening.

Our challenge is to guide people further from these initial "discoveries" into the comparative, comprehensive, thoughtful sources. We want to get the inquirer to us through our necessary infrastructure—paid for and licensed—to libraries, who hold the more complete, better-cited, and more deeply comparative work.

Now, it would be nice not to have to guess how people really work. That's why I have continued to advocate, at my own libraries and with vendors, that we ask—especially faculty—how they proceed with real projects, with recent, still-fresh-in-their-minds, work. (Popper comes to mind here with his theory that discovery can't be normalized to a set of procedures, so we really should ask and expect difference). I don't think it would be as hard as people sometimes make it out.

This is also why I continue to ask the "discovery" vendors not for usability studies, but for in-depth subject and user-type discriminated study of actual behavior on real-life research. Not just simplistic surveys, but real in-depth ethnographic research.

Some can deliver their initial work in design of their discovery interface (and I applaud that), but so far none have provided an assurance that they will continue to work on understanding actual user behavior—leaving it to us instead—and you know how

much time, money, and programming we can throw at that kind of project, right?

So I call on them now to work with us and to share with the scholarly community—as a full member of the scholarly community—together. Their work and our work—together.

But let's go ahead and guess here for second, since that work hasn't been done yet. How would we like a student, ideally, to get through from the web, to the library, to thinking?

We might consider how we do it ourselves: I go to web, of course, but if it's a serious question, I then consult other similar works—reference works, generally, and then I follow up on citations given in web sources, or start to search in journal databases. But do I really do this? Well, let's take the issue of discovery (which I have been exploring for this brief talk).

I have to say the word "discovery" gets a lot junk on the web—lots! And on the more scholarly web, searches get a very wide subject array (psychological, historical, chemical), and then when you try to phrase it as "concepts of discovery in history and philosophy of science" for which, by the way, I know articles and books exist—I get "your search did not match any articles."

So, being somewhat of a critically reflexive researcher, I went to my library, to the Stanford Encyclopedia of Philosophy, to the AskUIUC service, to see if there was a key history and philosophy of science database, and then I went to the History & Philosophy Library at UIUC (which was closed), and then, eventually, tried some history databases and some philosophy databases (did you really think I remembered that Karl Popper had written on the Logic of Scientific Discovery?)

So, that's the kind of trail someone might leave, and it's not very useful because it's just me. What would be useful is a wide range of specific tracings like that, on specific projects, soon enough for memory, with mistakes and embarrassments, and lazinesses all tracked. We don't have them—anywhere—except by anecdote and always so long after the fact as to be questionable.

But I don't want to belabor this; I just want to suggest this is perhaps the only strategy that can get us somewhere beyond our current confusions and within our own stated educational mission.

Meanwhile, while we're waiting for that research you'll now do to help us all (vendors). I'd like to point to the best new idea we might hope for today, right now: Reference Universe and Credo Reference.

I like Reference Universe because it collates our now dispersed reference collections and it collates our print collection with our online reference resources. I especially like Credo Reference because it collates e-reference and then federates searches to the next logical level (that, as you can see, I would do).

It's an indication that they are paying attention. And another indication is their attempts to work with the web by linking their Topic Pages into local libraries.

I don't claim this as "my idea" but I did mentioned at ALA Chicago 2005 the idea to Eric Calalucia, president of Reference Universe, that they ought to partner with Wikipedia as a win-win scenario—giving Wikipedia cred and giving Reference Universe face time.

Credo Reference seems to be working toward this by inviting Wikipedia to their panel at Lyrasis last year, their posting of topic pages on the open web, and their linking from those pages out to libraries.

Discovery layers claim to raise usage, but they haven't mentioned this kind of partnership with the true web discovery layer, although they claim it is web-scale.

But it is this kind of partnership, mediating between Web search and library search, that would really raise usage—and would be worth paying for, as well. But why reference? (Remember, I am not talking about simple "finding" of known items.)

I think exploration toward discovery requires an environment of backing and forthing, summary of a sort-of known universe, and then out on a tangent, back to another summary maybe, perhaps back around to where you started. And you need to be able to do this without getting lost.

Reference works and reference tools provide a starting place and a homing position. Reference's value is summary and an entrée into scholarship, comprehensiveness, and an entrée to literacy.

The web has too much information that is not organized, filtered, or curated. Reference's only fault is it's harder to find, but perhaps Credo and Reference Universe in partnership with the various "discovery layers" could come to a solution together.

To get back to the beginning: With reference tools like this, with some more collaborative partnered research, and with a little entrepreneurial spirit, we could get the library back into the "research across thresholds of decoding the disciplines" or whatever other phraseology they come up with for what we do.

More thinking and more concerted exploration are the fundamental, central, critically reflexive, mission of the university, of education, and of the library.

Library reference tools can be an intermediate step, a useful one, and perhaps a more manageable one than all of the layers of discovery attempting it all on their own.