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Virtual Reference: An Encounter Wherein Marian Meets vivaciousgurl En Route to Jeeves

by Alisa J. Whitt (Reference Librarian, College of Charleston) <whitta@cofc.edu>

This time last year, informed *ATG* readers may recall a somber but entertaining note of warning from authors **Steve McKinzie** and **Jonathan D. Lauer**, who cautioned that digital reference might just be the emperor's new clothes.¹ Digital reference, or virtual reference as I prefer to call it, is coming out of the closet, clothes or no. Virtual reference is still in its infancy, professionally speaking. When it comes to the software behind the service, "upgrades," reinstalls, and workarounds are as routine as bathroom directions at the reference desk. The big players are still scrambling for market share even as the market shifts — note the recent acquisition of **LSSI** by **Tutor.com**.²

Because even the smallest special library can offer virtual reference using freely available chat software, this sort of service isn't limited to research libraries with beefy research-library-sized budgets. Virtual reference in libraries is evolving at approximately the same clip as your teenager who just downloaded **AOL Instant Messenger** onto your home computer. Which is to say, fast. Very fast.

For those of you who've been hiding under a pile of LC subject headings, here's the one paragraph overview. Virtual reference uses Instant Messenger-like software to allow librarians and patrons to chat in real time; with an additional outlay of cash comes additional functionality, such as co-browsing databases (library catalogs, **Lexis-Nexis**, the Web, any "database") and sharing applications (a stand-alone CD-ROM, for instance). Virtual reference, when everything is working right, involves two or three major concepts. The first of these is the simplest: professionalism. When "vivaciousgurl" asks "r u there?," Marian replies reassuringly, using something recognizable as the King's English. The second assumption, equally important and frequently unstated, is speed. When Marian leaves the virtual conversation to pull the perfect title from a remote corner of her reference collection, vivaciousgurl feels entire eons pass before her blue-tinted eyelashes. "Timeliness," a much-lauded print-world virtue for reference librarians, assumes a hauntingly MTV-spin in the realm of virtual reference. Where timeliness leaves off, "instant" rushes in, breathless, and most likely barefoot. Lastly, and most important for the purposes of our present discussion, is access. Bytes trump books in virtual reference — period.

Bytes trump books, you say? For shame! What library school did you go to again?

Relax! I don't mean any old byte trumps the 1928 *Britannica*. Absolutely not. This is where the collection development issue comes in. Virtual reference librarians need access to solid reference materials, but we need them on the Web and we need to be able to send that data to our patrons with relative ease. "Sending" merits a bit of deconstruction in the virtual reference environment.

To send anything from a book, Marian must retype it (charts and graphs, anyone?) or scan it, save it, and then send it. Many reference librarians have yet to find the "on" button on the scanner, forget about rotating caddywampus images and creating PDF files. In the case of databases and other electronic reference tools, it's a simple copy and paste operation for brief, one-liner answers. More involved questions require some form of shared access, most simply accomplished by sending a URL while engaged in chat. If virtual reference takes hold with anything vaguely resembling the fury of **Instant Messenger** (the furtive hope of Marian across the country, who suffer from inexplicably sagging statistics), then virtual reference will hasten the already-in-progress movement towards electronic reference materials such as **xreferplus** and **Oxford Reference Online**.

As old print standbys go the way of *Britannica* and the U.S. *Statistical Abstract*, becoming Webified with friendly user interfaces (okay, so maybe *Stat Abs* isn't all that friendly), reference departments will increasingly need to consider virtual reference in their collection development policies. Try and **Google** yourself a collection development policy that considers virtual reference. What you'll find today are libraries with collection development policies that also happen to offer a link to virtual

reference on the same Web page. Even further from the concept are the collection development policies that link to a "virtual reference" page that's actually a collection of Web-accessible reference tools (zip code directories, currency converters, and recipe finders).

A recent post to **Dig Ref**, a popular Internet discussion list frequented by 2,000-odd practicing virtual reference librarians, inquired about collection development policies and digital reference operating procedures.³ The inquiry received no responses. Collection development policies don't yet know virtual reference exists.

What's in a Name?

Trying to locate useful information on virtual reference from a collection development perspective reveals a fundamental problem: it's having trouble naming itself. It's a bit like the pornography issue — "I know it when I see it" — but knowing what to call it has been a bugaboo for all those who do it. If I were Queen For A Day, the first order of business would be for us to get the naming straight. Are we talking about "Ask-A" services here? Or would that be "AskA"? If you look it up, you'll find both are, unfortunately, in use. Then there's the "digital reference" camp, conforming to the current vogue of prefixing all things Web and electronic with the word "digital" ("e-reference" and "electronic-anything" are so '90s.) "Live Reference" has some supporters, but if virtual reference gets the "Live" moniker, then where does that leave hot-blooded, in-the-flesh reference? Extra-Live? LiveFX? How about "Face Time Reference"? To solve the virtual reference naming problem, one is tempted to bollix together another catchy acronym, but does this profession really need another acronym? If so, "VRD," as in "virtual reference desk," seems destined for something like greatness, if only because a conference by that name is gaining a toe-hold in the psyche of practicing virtual librarians. (See the upcoming VRD "Reference Roundup" at <http://www.vrd2003.org/>.)

Naming has been such an issue, in fact, that virtual reference librarians started poking fun at themselves and their service, coming up with alternate names ranging from "TooMuchToAsk" to "SmartAsk."⁴

For the purposes of this discussion, I'm sticking with "virtual reference." Like most election conundrums, I don't care for it all that much, but I dislike it less than the alternatives. Let it be understood that I do not mean lists of Web-based

resources that are useful in answering ready reference questions, though those collections can be quite handy when practicing the verb form of *virtual reference*.

Virtual reference, the noun, is — professionally speaking — a toddler. As such, it is gawky, ill mannered, and highly unpredictable. Virtual reference is not yet ready to be taken out in public places. Like obstinate new parents, librarians enthusiastically take it out anyway.

We need look no further than our own professional literature to get a sense of just how novel virtual reference truly is. In *Library Literature*, the only subject headings to describe the topic are hopelessly limp-wristed: "reference services — automation." Queen For A Day says do away with the term "automation" altogether, unless you plan to give me a dishwasher and coordinating washer-dryer ensemble to go with my fancy ermine robe. But I digress.

Okay, so it's new. It's ungainly. It's having trouble establishing a proper name for itself. But evolve it will. And in some very public places. Regardless of its ungainliness, electronic reference is here to stay. It is, after all, nothing more than a different way of delivering what we've been doing all along. From a collection development perspective, it's a safe bet that virtual reference will create an increasing demand for revamped, digital versions of existing reference materials and it will also encourage the development of entirely new digital reference collections.

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While we labor as a profession to get a handle on how virtual reference works and how it ought to work, the remainder of this article will outline a few of the issues data providers ought to consider when they come peddling new reference products to the virtual librarian.

URLs & Citation Formats: The Flummoxing of the Masses

The number one issue for database producers and virtual librarians is ease-of-use within reference databases. We need stable URLs! Without stable URLs, a simple question or email follow-up is transformed from a pithy one-liner ("See <URL>") to a series of arcane instructions complex enough to flummox both students and their Ph-D-toting counterparts. (Don't even *bother* sending database access and search instructions to vivaciousgurl, who started her *Salinger* paper the night before it's due; she'd just as soon Ask Jeeves, thank you very much.)

I recall more than ten years ago when a colleague said, with what I hope was irony, "What's so hard about remembering control + right bracket?" (the telnet escape sequence, for those with a morbid curiosity for the technical). What's so hard, I ask, about telling a patron (and with virtual reference, remember that "telling" is *typing*) to go to the library homepage, select databases, unless you're off campus and then you need to go to "off campus access" and enter this and that and then go to databases and then ...you get the picture. Using library databases is hard enough without asking patrons to read five paragraphs of instructions, all delivered via a chat box smaller in size than a credit card.

Incidentally, virtual reference software invariably has Voice Over IP in development, in production, or working, but it's a bandwidth hog. Some day it will be there, but in the meantime, typing is generally the order of the day.

Reference questions require follow-up. To the extent that this is true with warm-blooded, face time reference, it is doubly true in a virtual world. Follow-up in virtual reference most often happens via email. How many of your current databases allow you to easily save or email the full text of an article or illustration to your (legitimate) patron? I want to be able to email any and all results to my patron, to myself, to anyone with legitimate access to my library's data. And that email must include actual data. Not a citation. Data. It does neither my patron nor me one iota of good to send a virtually helpless (ahem) patron a citation, unless of course we're just trying to generate reference statistics ...which isn't such a bad idea now that you mention it. If my results are a chart, I want that chart to go to my patron. If my results are a full-image of an article, as in JSTOR, I want that article to go to my patron. In fact, what I really want is to be able to select a variety of items from a hitlist and email all of them to my patron in one simple well-worded message.

EBSCOhost, incidentally, does this with relative style and grace. Cruising through my list of relevant hits, I can "add" items to a folder and then in one click I can mail the whole folder (HTML full text and PDF) off in a tidy little package.

While you're listening, database producer, how about a little citation relief? We're talking **MLA**, **APA**, **Turabian** — remember them? Again, unless you're just trying to help me boost my reference stats, this is a nightmare of giggling but epic proportion for every reference librarian and every student on the planet. Every database should do its own home-

work, and offer a help screen with "how to cite" instructions in the three major citation formats. To fail to do so is simply sloppy. Citing resources is hard enough, let's not compound the burden by asking students to cite URLs that look more like foot-long passwords.

Database producers who seek to address the citation issue have found a few creative solutions. The best, for my money, is *Britannica*. Each entry has a "Cite this article" link located at the top of the page, so even vivaciousgurl might happen upon it. Following the "Cite this article" link, the user is bounced to the bottom of the page, where *Britannica* editors have dutifully provided both an **APA** and an **MLA**-style citation. One tiny step for the plagiarism police, one huge leap for librarians. **Grove**, provider of the definitive electronic reference databases in art and music, has attempted to address the problem, but their solution is both less elegant and less informative. A "How to cite" link buried at the bottom of each entry directs determined seekers to one single page which offers up **Grove's** idea of how to cite **Grove**, but makes no mention of **MLA** and **APA** — both of which can be considered higher authorities in this particularity.

Virtual Partners Make Strange Bedfellows & Stranger License Agreements

Virtual reference is introducing new and often unique collaborative partnerships that will eventually require us all to rethink the fine points of license agreements. Collaborations between and among libraries are often the only way to extend virtual "desk" hours. Staff is the most expensive resource in any library, and virtual reference is particularly expensive. **Charles McClure** estimates that virtual reference costs three times as much as "regular" reference (in part due to huge underlying technology costs).⁵ Collaborative virtual reference efforts come in many flavors: entire states join multi-type libraries together or, in rarer cases, a library may partner with another library across the U.S. or in another country. These somewhat bizarre partnerships don't necessitate joint database purchases, but they do necessitate librarian access across institutions. The Australian librarian working in a collaborative partnership with the Omaha, Nebraska library will need access to Omaha's reference databases, and vice-versa.

Even more complex, from a licensing perspective, are the libraries that contract with their virtual reference software provider for after-hours virtual reference service. In such situations, a contract-working virtual reference librarian may answer questions from twenty or thirty libraries in any given shift. My library has access to 152 databases (today). You do the math. Contractually speaking, virtual reference should provide for an ample education for the kids of our corporate attorneys.

Conclusion

Virtual reference will be like your teenager in another respect — it's going to grow up so fast you won't recognize it one day. One day, it'll be just another way to ask a question. When that day comes, the problems of accessing, sharing, and citing these new electronic reference materials will be, one hopes, ancient history. Stable URLs will be so common that we don't need to find a phrase to describe them, and speaking to a reference librarian over the Internet (and I do mean speaking) will be as simple as a phone call. Just think, there Marian will sit, talking to vivaciousgurl over the computer headset. Vivaciousgurl will still need help finding information, but Marian will be able to talk to her and browse databases on the Web just the way she does at the reference desk. Only now it's not just vivaciousgurl who's in bunny slippers. Marian has hers on too. Perhaps virtual reference is going to make research even easier than it ought to be? 🐰

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future

Preconferences and

Vendor Showcase

Main Conference

2003	5 November	6-8 November
2004	3 November	4-6 November
2005	2 November	3-5 November
2006	8 November	9-11 November
2007	7 November	8-10 November
2008	5 November	6-8 November
2009	4 November	5-7 November
2010	3 November	4-6 November

Endnotes

1. **Steve McKinzie** and **Jonathan D. Lauer**, "Digital Reference: A New Library Paradigm or the Emperor's New Clothes." *Against the Grain*, v. 14, no. 4 (September 2002), pp. 34-38.
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