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## Optimizing Library Services: Managing the 21st-Century Reference Collection

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# Optimizing Library Services — Managing the 21st-Century Reference Collection

by **Rosanne Cordell** (Associate Dean for Public Services, University Libraries, Northern Illinois University)

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In 2009, **Jack O’Gorman** and **Barry Trott** stated that, “The early 21st century could be considered the Golden Age of reference publishing. Subject encyclopedia coverage has never been better. New editions of classic works have been produced, and other new encyclopedias have filled in the gaps. Subject indexing has improved over the last 20 or 25 years, and products like Reference Universe act as an index to printed and electronic reference collections,” (p. 330). The reference collection, physical or virtual, is still a core component in reference services. The selection and management of these sources continues to be a time-consuming part of reference work, but these are essential for timely and accurate reference assistance. One cannot depend exclusively on open Web searching on-the-fly to provide the highest quality of assistance; having on hand top sources of information expedites reference processes, regardless of the patron or question.

Reference collections are not just for use in reference transactions; in academic libraries, the reference collection is also a major resource for the instruction program. Teaching students to use the reference collection effectively for background information on the topics of their research requires a collection that is reflective of the curriculum and is evaluated continuously. Teaching the use of this collection is not a self-serving exercise; students must be able to determine their information needs and judge their familiarity with their research topics. Teaching students how to use a reference collection effectively is giving them context for their further research.

Managing a reference collection in the 21st century is a complex task. Until quite recently, there was no article-level indexing, but select titles and publishers were being made available electronically. Reference collection managers were facing this mix of 19th- and 21st-century issues. Moreover, the selection of reference sources often involves numerous people, and the determination of what goes into the reference collection as opposed to the circulating collection is not as clear-cut as it would seem. Furthermore, even the location of sources within the reference collection can vary from library to library. How does one manage in this continuously-shifting environment?

First, a reference collection needs a single person to manage it. This does not mean that others should not be requesting or recommending titles, nor that the reference collection manager shouldn’t need to consult with others on selection or placement within the collection; rather, this means that one person is ultimately responsible for seeing the collection as a whole,

and not just as the sum of individual subject areas. The reference collection manager might be responsible for selecting the general sources subject specialists will not consider (general encyclopedias, dictionaries, directories of institutions and grants, etc.), but more importantly this manager understands how the various subject areas relate to each other. She will know that weather is in the Qs but natural disasters are in the Gs. She will know that children’s book illustrators may be in more than one area of the Ps, and that lists of children’s books may be in the Ps or the Zs. She’ll also know the breadth of major reference works, being able to refer students to **Gale’s** literary criticism series for early philosophers, and she’ll understand the differences in the coverage of the *Dictionary of American Biography* and the *American National Biography*. She’ll also know that *Tests in Print* may be classified with *Mental Measurements Yearbook* if it is the Education students who use them, and they use the two series together.

In short, the experienced reference collection manager knows the connections among that collection so intimately that moving among its parts is effortless. Beyond the reference collection, the manager knows that certain types of materials are shelved in the circulating or other collections rather than the reference collection and why that arrangement makes sense for that library. She keeps up with curricular developments across campus in order to recognize which of the myriad new titles she’ll need to collect and which of the subject areas are already well represented in the reference collection. She’ll know which topics are covered at various course levels to match new acquisitions to student and faculty needs. Subject specialists who are actively involved in the selection and use of the reference collection provide much of this information to the reference collection manager, but it is she who understands the significance of new information in light of what is known about other subject areas and can make balanced recommendations on actions that will affect several subject areas.

Materials that are removed from the print reference collection require additional consideration. Should they be retained? Should they circulate? If the title is an annual, should all previous editions be retained? What should happen to print versions that have been replaced with electronic? Does the electronic contain all the years of coverage of the print volumes? If not, will the years not covered be retained? Where?

The placement of a particular work is not cut-and-dried. CIP information is not al-

ways correct, and there may be alternative classification for a particular title. Recognizing when the classification needs review by an experienced cataloger is part of the responsibility of the reference collection manager. Continuous review and weeding of the reference collection will bring classification problems to light. For online materials, consciousness of the terminology that brings up the best result set can suggest the assignment of subject headings that may have been overlooked for a certain work.



Modern reference collection decisions need to make use of the strengths of physical and virtual formats and optimize each. All reference librarians must feel at ease with the use of print and electronic versions of reference works and work together to ensure access to each. All titles of either format should be cataloged, and the cataloging should be as complete as is practical: reference works that have a few long sections should have those sections listed in a contents field, and subject headings should be numerous enough to do justice to the breadth of the work. If one is provided with cataloging for electronic works by the vendor, feedback should be given to the vendor if the quality or depth of cataloging isn’t what is desired. Having all reference titles in the catalog can be a huge undertaking, particularly if one purchases large packages of e-titles, and the particular list of available titles changes regularly. The library may need to devote a significant amount of time to tracking changes, but having reference titles in the catalog greatly increases the likelihood that they will be found by patrons and used, which is the point of our collecting.

We must understand print and electronic formats well enough to select by the criteria appropriate for each, and to choose between them. Sometimes electronic is the best choice, but sometimes the layout or use pattern will mean that print is a better choice. **Carol Singer** lists these reasons that a library might choose to purchase print over electronic: “... there are still some users who prefer to use print resources. In some schools or colleges, teachers or professors require their students to use a certain number of paper sources when writing a paper. In some locations, Internet access may be nonexistent or unreliable. For some libraries, the cost of the electronic edition of a resource may be considerably more expensive than the paper edition, or the online version may be considered too expensive for

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the amount of use it would receive. This is particularly likely to be the case when a book, formerly purchased only once every five to ten years in paper, turns into an annual online subscription.” (2012, p. x.). Whether an electronic title has a version for mobile devices may be another consideration as students make more use of mobile devices and less use of computers.

When making choices between print and electronic versions, cost is a primary consideration, but that, too, is not straight-forward. Is the cost of an electronic source one-time or an on-going subscription? Is there an annual maintenance fee? If the electronic product seems the better choice on other criteria, will increased access make the cost per use less than the print version? Are the faculty making assignments that require a particular title ready to switch to the electronic? A brief demonstration of the electronic product might bring even reluctant eBook users on board, but you have to be willing to market new formats as readily as you do new titles.

The criteria for print sources and content have been developed over many decades and are widely understood. We must look at the interface for electronic sources and evaluate it just as critically. Is it easy to get to a full-screen view of the pages? Can a range of pages be printed easily? Is the source searchable, or is the index linked to the text so that the user does not have to page back and forth through the volume to get to the article desired? Are there multiple types of searching (keyword, article titles, source title, publisher, author, date, subject)? Can these access points be combined in one search? Is the print easy to read on screen? Look at the font, size, and layout. Are there any advanced features, such

as the ability to create an individual account to save notes, personal search terms, or create folders in which to save results?

One important bit of advice: get Reference Universe! I have no financial stake in **Paratext**, but I find myself advocating for the use of Reference Universe regularly. Remember the beginning of this essay, when I stated that “until quite recently, there was no article-level indexing?” That fact put reference collections at a par with periodicals before the advent of periodical indexes. Reference Universe is a unique product that focuses on reference sources and indexes at the article level. This indexing means that **Paratext** has finally brought access to reference collections into the late 19th century! Reference Universe is a major way for users to find needed reference sources on their topics. It brings access to articles in print and electronic reference sources together, achieving for reference sources what periodical indexes did for journals, and more.

Teaching users how to browse is still a valid use of instruction time, but Reference Universe will give them the call number for a print source on their topic or a link directly into the text of an electronic source, which now brings access to the 21st century. The keyword searching can be targeted to specific areas of the record, an improvement on general searching that **Paratext** made after hearing from their customers. **Paratext** seems to listen to their customers. If you aren’t subscribing to Reference Universe, you aren’t providing the best access to your reference collection, and your reference collection is not getting optimal use. My advice is to subscribe to it, use it, and teach its use regularly. Users will be amazed at the quantity and quality of information they can find in your reference collection!

Reference and instruction librarians must focus on the content and not the format of reference sources. They need to keep up with

interface changes, new editions, new features, and added sources. They need to feel confident in navigating the entire collection, print and electronic, to help users find the best sources for their research needs. Nonetheless, the modern academic reference collection needs a reference manager that can keep all the issues related to reference sources on the radar of all who work with the collection. It is a complex task, even where the physical collection is shrinking.

### References

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## Changing Library Operations — The Orbis Cascade Alliance

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The evolution of library cooperatives and consortia promises new levels of operational effectiveness and efficiency, albeit with accompanying complexity and uncertainty. This is the first article in a series that will look at the emerging shape and characteristics of the Orbis Cascade Alliance, a non-profit consortium of 37 academic libraries in Washington, Oregon, and Idaho that jointly serve over 275,000 students. The incorporated (501(c)(3)) organization facilitates,



with the efforts of eight staff and the comprehensive cooperation of member library staff, the provision of a wide range of cooperative services. This article will look briefly at its mission, history, and organizational structure. Subsequent articles will emerge through librarians willing to share their knowledge and experience of the operations of the Alliance. This author will also contribute articles through conversations with members of the Alliance as well as his own experience

as an Alliance Council member for the past six and a half years.

### Mission

The mission statement posted on the Alliance Website is accompanied by vision and values statements, which express the spirit of the Alliance. It is expressed more explicitly in its current strategic agenda. The collaboration is both cooperative and competitive in that we challenge each other to find innovative means to jointly advance the library missions of the individual institutions we serve. My own experience

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