Truing the Wheel

Designing a refined taxonomy for virtual reference services in academic libraries
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Galvin’s Virtual Reference

Consists of Email, online form submitted via email, and Instant Messaging (IM).
Galvin’s IM

Instant Messaging conducted two ways:

- **GAIM** (now known as **Pidgin**) - an IM Client aggregator, with screen names for Google Talk, AIM, Yahoo! and MSN

- **Meebo** - a widget placed directly on the Ask A Librarian site that does not require the user to have an IM account
Virtual Reference

1. Librarian’s Screen
   Librarian receives IM from patron

   (10:36:55 AM) Jannelle: Hi, I have a question.

2. Patron’s Screen
   Patron receives librarian’s response

   JannelleIT: Hi, I have a question.
   ITLibrary: Great! How can I help you?
Troubles with Taxonomies
Hypothesis:

Traditional taxonomies for defining reference questions are ill-suited for Virtual Reference.

Over the past 15 years, reference services have changed. Let’s take a look at traditional reference question taxonomies in light of the new virtual services.
Traditional Taxonomies

William Katz’s question categorization:

1. Ready Reference – Who is the Mayor of Detroit?

2. Specific Search – Do you have a copy of Gravity’s Rainbow?

3. Extended Research – In-depth research assistance on a topic.

Traditional Taxonomies

JoAnn Sears expanded Katz’s taxonomy to include:

4. Library Policy – How many books can I check out?

5. Directional – Where are the restrooms?

Galvin’s Taxonomy

Major Categories:

1. Searching – using catalog, internet, or database to find materials
2. Instructing – instructing how to do any library-related task
3. Routing – providing directions to physical locations
4. Escorting – walking with patron to physical location
5. Fetching – retrieving item for patron
6. Troubleshooting – repairing technical glitches or hardware issues
7. Maintaining – refilling office supplies, general cleaning
8. Granting – providing keys to the GIS lab, checking out special materials
9. Disseminating – giving information about various library policies, hours
Galvin’s Taxonomy

Galvin uses a custom-designed Microsoft Access database, called RefStats that expands on the traditional taxonomy.

- Accounts for the uncertainty in patron’s request or question
- Details what services are provided in each transaction
- Contains 9 broad categories with sub-categories in each
Method
Method

Setting

• Added new virtual reference services

• Rolled out IM reference

• Added new email address reference@iit.edu

• Revamped Ask a Librarian page

• Publicized IM reference
Method

Process

• Study period was set as February 1-March 31, 2007

• Chat transcripts and emails automatically saved

• After the study period:
  • Read and classified all emails and chat transcriptions
  • Pulled RefStats data for February and March
Data Collection
Data Collection

Traditional – Katz & Sears

VR
- Ready Reference: 24%
- Specific Search: 49%
- Extended Research: 22%
- Directional: 5%
- Library Policy: 3%

In Person
- Ready Reference: 17%
- Specific Search: 31%
- Extended Research: 41%
- Directional: 3%
- Library Policy: 8%
Data Collection

Galvin

**VR**
- Searching: 21
- Instructing: 33
- Troubleshooting: 19
- Routing: 15

**In Person**
- Escorting: 158
- Fetching: 244
- Disseminating: 254
- Maintaining: 50
- Granting: 26
- Routing: 98
- Instructing: 61
- Troubleshooting: 14

*Values are actual counts*
Data Collection

Traditional – Katz & Sears

IM

- Ready Reference: 39%
- Specific Search: 48%
- Extended Research: 9%
- Directional: 4%
- Library Policy: 4%

Email

- Ready Reference: 31%
- Specific Search: 49%
- Extended Research: 14%
- Directional: 6%
- Library Policy: 6%
Data Collection

Traditional taxonomies are designed for direct contact with a patron. The use of virtual reference and electronic resources create a need for categorizing ancillary transactions.

- Technical difficulties
- Misuse or abuse
- Assistance with advanced electronic resources
Data Collection

Updated Taxonomy

Email

- Ready Reference: 5%
- Extended Research: 14%
- Directional: 30%
- Specific Search: 46%
- In Person: 5%

In Person

- Technical Difficulty/Disconnect: 17%
- Library Policy: 3%
- Misuse/Abuse: 14%
- Specific Search: 26%
- Extended Research: 6%
Data Collection

Extended Reference

Email

100%

Tool  Subject
Data Collection

Notable Figures

- 87% of IM questions are specific search or extended research in the traditional taxonomy
  - 49% with our new categories
  - New categories had lesser impact on Email questions

- 78% of extended research questions in virtual reference are subject-based

- 31% of Email questions are library policy compared to 9% in IM
Discussion

Aspects of the study that worked well

• Automatic logging of transcripts simple and effective

• Established in person statistical tracker made comparing data easy
Discussion

What we would do differently next time

• Extend study period to include different times in the semester

• Conduct study on an established IM reference service
Conclusions
Conclusions

- Technical difficulties are a factor in IM reference, and change the distribution of transaction types greatly when accounted for in the traditional taxonomy

- The impersonal nature of virtual communication leads to more misuse of reference services

- We see a higher proportion of research questions using virtual reference than in person
Conclusions

• Traditional taxonomy could split extended reference category between extended reference in a tool and in a subject

• New taxonomies must account for technical problems in virtual reference, as they take up a large amount of time

• Ready reference category is obsolete in virtual reference
Suggested New Taxonomy for Virtual Reference

- **Specific Search** – Search for a specific title
- **Extended Research on a tool** – In-depth assistance in the use of a research tool
- **Extended Research on a subject** – In-depth assistance on a subject
- **Technical Difficulty** – disconnects, returned e-mails
- **Misuse** – non-IIT related questions, abusive language, spam
  - **Library Policy**
  - **Directional**
Conclusions

What to do with all this information?

• Create circulation desk email assistance

• Evaluate peak usage times and adjust librarians’ schedules accordingly

• Train staff based on the types of question most received
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