

From Susan Hildreth, State Librarian of California:

I am pleased to share with you *California Reference Service Focus Groups – First and Second Level Reference: Current Trends and Future Needs*. This report prepared by Sandra Nelson and Diane Mayo represents the results of meetings held from July 18 to July 26, 2005, from San Diego to Sacramento. These focus groups were sponsored by the California State Library in partnership with the Metropolitan Cooperative Library System (MCLS). Similar discussions were held in the Bay area in the fall of 2004. For the focus groups that recently concluded, MCLS selected the facilitators, arranged meeting locations and dates, and handled registration.

The recommendations included in this report are just that – recommendations. They do not represent a specific action plan and need to be reviewed in the context of information services that will meet the needs of Californians in the 21st century. These discussions represent one of the steps that the State Library will be taking in the next year to determine the future of resource sharing in this electronic Internet age.

In late November and early December of this year, further discussions on the future of public library resource sharing and cooperative services will be held in a number of locations in the state. These discussions will be led by Maureen Sullivan, a library facilitator/consultant from Maryland. Maureen has worked in academic libraries and consulted with many library systems. Maureen will also prepare a report which will help inform topics for discussion at a stakeholders' convocation which will be held sometime in 2006. I believe that it is critical for the State Library to strategically plan how cooperative services will be provided and funded in the 21st century. I would encourage you to attend these workshops later this year.

CALIFORNIA REFERENCE SERVICE FOCUS GROUPS

**FIRST AND SECOND LEVEL REFERENCE:
CURRENT TRENDS AND FUTURE NEEDS**

July 18-July 26, 2005

REPORT

Prepared by Sandra Nelson and Diane Mayo

August 3, 2005

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FIRST AND SECOND LEVEL REFERENCE:
CURRENT TRENDS AND FUTURE NEEDS**

REPORT

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EXECUTIVE SUMMARY

During the last two weeks in July, 2005, Diane Mayo and Sandra Nelson led six focus groups on the current trends and future needs of local and second level reference services in California public libraries. Nearly two hundred librarians attended one or more of the focus groups in one of the eight sites (the focus group in Sacramento included teleconference links to remote sites in Chico and Modesto). An additional group of librarians attended one or more of five focus groups on this topic held in the Bay area between October 2004 and July 2005.

A number of clear trends emerged from all of these focus groups:

- The way the public accesses information has changed dramatically in the past decade and will continue to change as information technologies become more sophisticated and pervasive.
- Changes in the ways that libraries provide information services have evolved more slowly than have the changes in the ways the public accesses information.
- The second level reference service model is less able to meet the needs of current library users, who want immediate answers to their questions and prefer a self-serve environment.
- In many public libraries the demand for reference services is decreasing and the demand for more “popular” services is increasing.
- Library staff need to training to be able to effectively use electronic information resources – and to provide those more “popular” services.

This report includes six recommendations, which are summarized below:

1. Merge all of the existing second level question answering functions into one or two locations as soon as possible.
2. Identify all of the reference and information services being supported in part or wholly by state and/or system funding and evaluate the effectiveness of those services by collecting and analyzing data about each.
3. Use the focus groups to be facilitated by Maureen Sullivan in the fall to look at the system services remaining after the question answer function is centralized and identify those that can be delivered most effectively by a geographically nearby organization.
4. Continue to provide coordinated training, both face to face and online. Provide subsidies for underfunded and remote libraries to ensure their ability to participate.
5. Begin planning to provide subsidized access to fee-based databases for libraries and the public on a statewide basis.
6. Develop a plan to continue to make local information available to all residents of California in an increasingly electronic information environment.

PERCEPTIONS OF LOCAL AND SECOND LEVEL REFERENCE SERVICES IN 2005

Participants at all sites were asked to write one word to describe local reference services in 2005 and one word to describe second level reference services in 2005 during the registration process for each focus group. A complete list of the words from each site can be found in Appendix C.

The words provide a snapshot of people's perceptions about current local and second level reference and provide a framework for looking at future services. Most of the words used to describe first level reference services were descriptive rather than evaluative: databases; hard; email; practical; involved; electronic, etc. Of the relatively few evaluative words used most were positive: effective; timely; personalized; excellent; indispensable, etc. The negative words that were used included diminishing, minimal, limited, diffuse, sad, and uneven.

Many of the words used to describe second level reference services were also descriptive: deeper; harder; remote; online; research; specialized, etc. However, there were more evaluative words used to describe second level reference services than were used to describe local reference services and most of those words were positive: fabulous; helpful; necessary; amazing; effective; etc. The negative words included dying, declining, underutilized, slow, and non-existent.

Nelson read the words aloud early in each focus group. The words were used by the facilitators to gauge the emotional intensity of each group and to provide the participants with a sense of what their colleagues were feeling. In general people were more emotional about second level reference than local reference, which makes perfect sense. Most of the participants in the focus groups expect second level reference to be phased out in the coming years. The positive words that were used were intended to send a message about the value of the service in the past and the hope that local library staff would continue to get the support they need to provide quality reference services.

The fact that there were relatively few evaluative words signaled that the focus group participants were more inclined to discuss issues of substance than their feelings, which turned out to be true at every site. There was no general sense that participants felt that core services were being attacked or that their local services would be crippled by any changes in second level reference. There was a positive feeling about the services that had been and are currently being received from second level reference service providers. There was also a clear recognition that the ways by which public access information have changed and that both local and second level reference services are being and will continue to be affected by those changes.

PERCEPTIONS OF THE PRIORITY, VALUE, AND EFFECTIVENESS OF CURRENT SECOND LEVEL REFERENCE SERVICES

Participants in each of the seven focus groups* were asked to list the information support services available from their second level reference providers. A total of 19 services were identified. Participants were then asked to select up to five of those 19 services that were important to them and to rate the value and effectiveness of each selected service on a scale of 1 (high) to 5 (low). A copy of the rating form can be found in Appendix A and the tabulated responses from each site can be found in Appendix B, Tables 1-5. The table below includes the list of all of the services that were identified and a summary of the responses from all of the sites.

Table: Summary of Data from All Sites

	Frequency	Percent of Respondents	Value	Effectiveness
Answer Questions/Expert reference	162	93.10%	1.56	1.66
Training/Professional development	149	85.63%	1.64	2.15
Access to other resources/Special materials	94	54.02%	1.44	1.74
Communication/Networking	80	45.98%	1.84	2.16
ILL	39	22.41%	1.31	1.64
Webliographies/Bibliographies	37	21.26%	1.65	1.86
Survey or indexing of local resources/Special collections in other libraries	31	17.82%	1.65	1.77
Negotiate database fees	31	17.82%	1.48	2.39
Consultation	24	13.79%	1.88	1.96
Lend/Supplemental materials	20	11.49%	2.05	2.25
Staffing for '24/7'	15	8.62%	1.93	2.07
Statistics/Data	13	7.47%	1.62	1.77
Grant writing for reference support materials	13	7.47%	1.92	2.08
Trends	12	6.90%	1.58	2.42
Web site (about system)	8	4.60%	2.88	3.25
Purchasing materials for host libraries	5	2.87%	1.60	1.80
Digitized local resources	4	2.30%	1.75	2.00
System coordination	2	1.15%	2.50	2.00
Collection subject depth	2	1.15%	2.50	2.50

Total number of respondents = 174

*The responses from the participants in the two teleconference groups at Chico and Modesto were combined and reported as a separate site.

Priority

Priority was determined by the frequency with which services were chosen by the participants. Only three of the 19 services were selected as important by more than 50% of the participants: *Answer questions*; *Training*; and *Access to other resources*. The gap between the number of people who selected *Answer questions* and those who selected *Training* is relatively minor (13 people or 7% of the total respondents), but the gap between *Training* and the third priority, *Access to other resources*, is significant (55 people or 32% of the total respondents). The fourth priority, *Communication/Networking*, was selected by 46% of respondents. The remaining services were selected by 23% or fewer of the participants. Table 5 in Appendix B indicates how many times each service was selected in each of the seven sites (Chico and Modesto, the teleconference sites, were tabulated as a single site separately from Sacramento).

These priorities are somewhat at odds with the findings of the five focus groups held in the Bay area. (See Appendices F1 and F2 for summaries of the reports from those groups.) The participants in those focus groups identified *Training* as the most important second level reference service, while the six focus groups coordinated by Nelson and Mayo ranked it second. That data is relatively consistent. However, the general sense one gets from reading the reports from the Bay area focus groups is that the *Answer questions* service is less relevant than it once was and the participants expected that it would continue to lose value as library users become more able to use electronic resources to fulfill their personal information needs. That is quite different than the high priority placed on that service by the participants of the focus groups led by Nelson and Mayo.

Value

The importance of the services to each participant was expressed through the value numbers. Although *Interlibrary loan* was only selected by 39 participants in the focus groups (5th of 19 services), those 39 people ranked it as the most valuable service they receive. *Access to other resources* was selected by 94 participants (3rd of 19 services) and those people ranked it as the second most valuable service they receive. These are similar services. They both address the need to have access to materials that have not been digitized and they are both particularly important to staff and users of smaller libraries.

Negotiate database fees received the third highest value rating at 1.48, but was only selected by 31 of the participants (7th of 19 services). However, the priority of this service is probably not accurately represented by this ranking. *Negotiate database fees* was identified as a service during the Los Angeles focus group, but staff from MCLS said that their second level reference services did not include such negotiations. Therefore it was excluded from the final list of services from which the participants selected. If *Negotiate database fees* had been left on the Los Angeles list, a number of participants at that site would undoubtedly have included it on their lists of important services – and 60 people participated in this exercise in Los Angeles. When the Los Angeles participants were asked which was more

important, subsidized access to databases or a person to provide expert reference back-up 42 selected the databases and 25 selected the person.

Answer questions has the highest priority of any second level reference service because it was selected by 162 (93%) of the participants in all sites. However, it ranked fourth in overall value (1.56) and there was considerable variation in this assessment in the various sites. The overall average value rating for *Answer questions* was 1.56, but average rating by site ranged from 1.23 in Los Angeles to 2.08 in San Luis Obispo. In fact, four of seven sites rated the value of *Answer questions* as lower than the overall average. The overall value rating was strongly influenced by the number of people responding at the Los Angeles focus group (60) and the relatively high value those people placed on the service *Answer questions*.

Training had the second highest priority among the listed services and was selected by 149 (86%) of the participants in all sites. However, it was ranked 8th in overall value (1.64) and there was considerable variation in the ratings at the individual sites. Participants in the teleconferences at Chico and Modesto rated the value of training at 1.33 while participants in San Bernardino rated it at 2.05 and those in Tulare rated it 1.91. Two issues that were mentioned often at all sites were the distances that some people had to travel to attend training and the cost of the training. These may well have affected people's perception of the value of the service.

The services that were valued least among the participants were those provided the fewest direct benefits to library staff or the end-users: *Grant writing*; *Staffing for '24/7'*; *System coordination*; *Collection subject depth (building collections at the host library)*; and *Maintaining a Web site describing system reference services*. The one exception to this is *Lend/supplement materials*, which was selected by a total of a total 20 people in San Bernardino and San Diego (11% of the total participants). Those 20 people rated the value of *Lend/supplement materials* as 2.05. These people clearly saw a difference between this service and *Interlibrary loan* and *Access to other resources*, both of which were also selected in San Diego and San Bernardino and both of which were rated as far more effective than *Lend/supplement materials*.

Effectiveness

Effectiveness is an expression of how well the participant believes the service is provided. In every case but two the effectiveness of the second level reference services was rated as lower than the value of those services and in those two cases the number of responses was too small to be statistically significant. The service *System coordination* was identified during the San Diego focus group and selected as a priority by two people, both of whom rated the value of the service as 2.5 and the effectiveness of the service as 2.0. A second service, *Collection subject depth (building collections at the host library)*, was identified during the Tulare focus group and selected as a priority by two people, both of whom rated the value of the service as 2.5 and the effectiveness of the service as 2.5.

The variations between the perceived value and the perceived effectiveness of the remaining 17 services range from minor (less than .1 for *Consultation* and *Answer questions*) to relatively significant (.91 for *Negotiate data base fees*).

Interlibrary loan was the most valued service by the 30 people who selected it as a priority. It was also seen as the most effective service by those people. However, the difference between the average value rating of 1.31 and the average effectiveness rating of 1.64 was .33. There was approximately the same variance between the value and effectiveness ratings for *Access to the other resources*, the service with the second highest value rating (value of 1.44; effectiveness of 1.74).

The data about the effectiveness of the services that had the highest priority (e.g. were selected by the most people) show considerably more variation. As noted earlier, there is relatively little difference between the value people place on the highest priority service *Answer questions* (1.56) and people's perception of the effectiveness of that service (1.66). Furthermore, *Answer questions* had the second highest effectiveness rating of the 19 services.

In contrast, *Training* which that was ranked as the second priority overall was rated 1.64 in value but 2.15 in effectiveness, a difference of .5, and it was 13th of the 19 services in overall effectiveness. The service that had the third highest priority, *Negotiate database fees*, was ranked even lower than *Training* in effectiveness. It was 16th of the 19 service with an effectiveness rating 2.39, a difference of .91 from its overall value rating of 1.44.

The reasons for the relatively low overall effectiveness rating for these two valued services are probably different. Discussions in the various focus groups made it clear that there are a variety of factors affecting the how people feel about *Training*: staff cuts at the second level reference centers have reduced one-on-one training at local libraries; local staff have difficulty traveling to training; some libraries find the cost of training prohibitive; the responsibility for training is moving away from second level reference providers and to Infopeople. The issues with *Negotiating database fees* appear to be quite different. People seemed to feel that too little was being done in this area and that what was being offered was still not cost-effective for most small and medium-sized libraries.

Summary

The five most important second level reference services are *Answering questions*, *Training*, *Access to Materials*, *ILL*, and *Negotiate database fees*. Of those, focus group participants are more than satisfied with the effectiveness of *ILL* and *Access to Materials* and are reasonably satisfied with the effectiveness of *Answering questions*. However, participants have real concerns about the effectiveness of *Training* and *Negotiate database fees*, and these concerns need to be addressed when planning for the future of second level reference services.

REFERENCE SERVICES NOW AND THEN: A BRIEF SUMMARY OF DIANE MAYO'S PRESENTATION

The CLSA legislation originated (1963) and was renewed (1978) in a time when most people, and library staff, had limited access to reference materials. The general public typically had the yellow pages, a dictionary and maybe an encyclopedia in their home. Beyond that the available sources for additional data were friends, newspapers and magazines, bookstores, and libraries. Even libraries had relatively limited access to resources, with small libraries and branches typically limited to knowing about only what appeared in their own card catalogs.

In 2005, library services are provided in a 7/24 world in which more than 2/3 of U.S. adults regularly use the Internet. The only demographics that affect Internet use in any statistically significant way are age and education level. People over 65 today are less likely to be regular users at 27% compared to 67% for all adults. Only 28% of people with less than a high school education regularly use the Internet as an information source.

A review of the top 20 reasons people use the Internet reveals that 14 information seeking behaviors that most likely would have been accomplished in a library in 1978. These include using a search engine to find information, researching a product or service before buying it, and looking for information on an interest or hobby.

The availability of electronic information in today's world drives changes in user expectations of service. Anywhere, anytime satisfaction is an expected result of electronic access. Wireless hotspots and Internet connected cell phones and PDAs remove the barriers of time and location from information seeking behaviors.

Public satisfaction with search engines is high; 96% of Google users report that they are satisfied with the results they receive. The consultants conducted an informal comparison of Google to other reference services in preparation for the focus groups. A literature survey on reference services conducted in licensed electronic databases resulted in six useful full text articles after 45 minutes. A Google search produced similarly useful articles, indeed several of the same articles, in approximately 5 minutes. A comparison of direct reference with Google demonstrated that Google answered typical reference questions (How do you make blancmange? When did the Taliban take over in Afghanistan?) in 7 seconds. Telephone reference took approximately 3 minutes. Virtual reference services responses ranged from 3 minutes to never, with the consultants breaking the connection after 20 minutes of waiting.

Off-site usage is increasing rapidly. Libraries are consciously seeking ways to enable it through self-service holds, renewals, payment of fines and fees by credit card. Some libraries even offer self-registration and the option to have trapped holds mailed to the borrowers' home or office.

The devices supporting access to electronic resources and services are also changing. Cell phones are one of the most ubiquitous new technologies in use, with the number of cell phones in use exceeding the number of land lines in 2005. Instant messaging (IM) is regularly used by more than 53 million adults, with 24% saying they use IM more than email. Nearly 75% of teens regularly use IM; IM is the communication tool of choice for peer interactions, with email being used primarily to communicate with "adults".

Statistics for reference services in California over the last 10 years show the results of these changes. Second tier reference questions are down from 23,606 in 1993 to 10,855 in 2003, a drop of 54%. Direct reference has shown a similar drop. In 1993 California libraries reported answering 1.4 reference questions per capita; by 2003 the number was down to 1.0 per capita, a drop of 28.9%. This contrasts with a nation-wide increase of 7% (1.0 per capita to 1.1 per capita) in the same time period.

In 2003 OCLC published an Environmental Scan that highlighted four large trends in the changing world of information services:

- Self-service is up; mediated service is down
- Content is disaggregating into discrete "learning objects" that can combine in new, more personalized ways
- Collaboration is increasing, between non-profits, governments, and commercial enterprises
- Information is a global commodity, being produced and used world-wide

Stephen Abram, in his May 1, 2004 Library Journal article "Born with the Chip" described the information behaviors of the "millennials" those people who grew up in the 1980s with computers and don't think of them as technology. He notes that they are format agnostic, nomadic, multitasking, and experiential. All of these traits will affect their expectations of and perceived satisfaction with library services.

Several developing trends will affect the general public's ability to retrieve and satisfaction with unmediated search results. Publishing is becoming increasingly digital. In the next 10 years 90% of the materials published in the UK will be published initially in digital format; 50% will be simultaneously published in both digital and print, 40% will be published only in digital format. Only 10% of publishing will be print only.

Google Personalized encourages users to enter a profile of interests which Google then uses to filter and rank search results, much as a reference librarian does with a reference interview. MyWeb 2.0 from Yahoo is a social search engine which enables users to share bookmark files with others who have similar interests, or to use the bookmark files of someone with an interest or expertise in an area totally unfamiliar with the topic. Yahoo says MyWeb 2.0 combines "the power of search technology with the power of people," another way librarians have been describing their role in the electronic world. Yahoo also just announced an agreement to crawl several licensed electronic databases, making bibliographic citations and full text articles from these sources available on the "public" web for the first time.

PERCEPTIONS OF LOCAL AND SECOND LEVEL REFERENCE SERVICES IN 2015

Immediately following Mayo's presentation, participants were again asked to write one word to describe local reference services and one word to describe second level reference services, this time in the year 2015. A complete list of the words from each site can be found in Appendix D.

The words used to describe local reference services in 2015 were quite different than the words used to describe such services in 2005. The majority of the words in all sites were still descriptive rather than evaluative, but the descriptions had changed. There was a much greater emphasis words like digital, virtual, online, remote, and Web-based. There were also an increased number of words that reflected the need to provide services that met the clients' needs immediately: fast; instantaneous; quick; speed; 24/7; etc.

The evaluative words used to describe local reference services in 2015 were generally more negative than the evaluative words used to describe those services in 2005. A number of the evaluative words reflected a sense that local reference services would be marginalized or gone by 2015: scarce; non-existent; gone; sporadic; bypass, etc. Positive words included creative; useful; unlimited; and value-added.

Many of the words used to describe second level reference services in 2015 reflected a belief that such services would be non-existent: gone; extinct; unnecessary; avoided; dinosaur; miniscule; superseded; marginalized; unfunded; global; etc. Another general theme was that such services, if they existed in any form, would be electronic: digital; Internet-based; technology; virtual; networked; etc. Positive words included integrity, unlimited, supportive, thorough, and superior.

The process of writing these descriptive words encouraged the participants to react to the information in Mayo's presentation. It helped to prepare them for the next exercise, which was to actually describe the local and second level reference services that they thought would and should be available in 2007, 2010, and 2015.

DESCRIPTIONS OF LOCAL REFERENCE SERVICES IN 2007, 2010, AND 2015

At the conclusion of Mayo's presentation participants in each focus group site were organized into small groups. The groups were asked first to identify the reference clients they expected to serve in 2007, 2010, and 2015. Then they were asked to describe the information needs of those clients in each of the three years. Finally, they were asked to identify the reference services their libraries would be offering to meet the clients' information needs in 2007, 2010, and 2015. Individual reports from each site can be found in Appendices E1-E6. The responses from Chico and Modesto, the two teleconference sites, were included with the Sacramento responses. A summary of all the reports follows.

Reference Clients

- Students will continue to be clients who need reference services in 2007 but the number of students who use the library for homework help will decrease as time goes on. Most students will be using remote access to online information resources to do their homework by 2015 (and probably earlier).
- Seniors will continue to be clients who need reference services at least through 2010 and perhaps to 2015. Some seniors will continue to want face-to-face interactions rather than access to electronic resources.
- People who do not speak English as a first language will need reference services through 2015. The numbers of such users are expected to increase in more rural areas and stabilize in more urban areas by 2015.
- People who want local information (local history, genealogy, etc.) that is not digitized were identified as important clients in five of the six sites and were particularly important to librarians in more rural areas.
- People from lower economic levels with limited access to technology were identified as probable clients in 2007, 2010, and 2015.
- People who need assistance to use print or electronic resources will be clients in 2007. There was no real consensus on whether people with these needs would continue to be clients in 2010 and 2015.
- As the discussion moved from 2007 to 2010, there was increasing emphasis on people who will expect immediate information in a 24/7 environment.
- By 2015, most participants in all groups expected most clients to be using libraries from remote sites to access electronic information.

Information Needs

- Most participants believed that the information needs of their clients would not be significantly different in two years. People will still need medical, legal, and

financial information. They will want do-it-yourself information. They will need business and career information and help with school assignments. Many people will still be interested in citizenship information.

- All groups discussed the need for information literacy training for the public in 2007. Some groups added that the public will still need help to operate equipment in 2007. There was less consensus on the need for information literacy training in 2010 and 2015.
- All groups identified local historical and genealogical information as a need for 2007. Most people thought that need would continue through 2015 or until local information is digitized.
- There was general agreement that people were going to demand timely, current information in 2007 and thereafter. In fact, people are expecting that now.
- People are going to want information in more formats in 2007 and even more formats as time goes on.
- Participants in most groups thought that by 2010 some people were going to want more specialized information to supplement the information they find on the Web.
- There was general agreement that by 2015 most people would be using electronic resources in a variety of formats to find information.

Library Services

- Every group identified information literacy classes as an important library service in 2007. Only one group identified information literacy classes as a service in 2010 and no group listed it as a service in 2015.
- Participants in all of the groups saw reference resources as becoming more electronic over the next ten years. Almost everyone described first level reference services in 2015 as online services for remote users. The library role will be to provide access to fee-based information at no charge to the user (although a minority of people thought that fees were inevitable).
- Participants identified a trend toward providing information in multiple formats that is starting already and will become more pronounced in the next two to five years. One group suggested that all technology would be integrated by 2015.
- Participants in most groups identified the need to provide 24/7 service and to provide more opportunities for self-service beginning as soon as possible.
- Participants in some groups saw a growing role for reference librarians to provide electronic mediation to assist clients to find information.

DESCRIPTIONS OF SECOND LEVEL REFERENCE SERVICES IN 2007, 2010, AND 2015

When the groups had completed their identification of clients, information needs, and library services for 2007, 2010, and 2015, the groups' conclusions were recorded on flip chart sheets. There was a general discussion of the library services that would be offered over the next ten years and then the participants returned to their small groups. The groups were asked to decide what second level reference services would be needed to support the local library reference services identified in the previous exercise. A summary of all the reports follows. Reports from individual sites can be found in Appendices E1-E6.

Second Level Reference Services

- Participants in all groups agreed that by 2015 second-level reference services as they are configured now will have been replaced by a centralized reference service that will provide a seamless interface for the client. The only issue open to discussion was how soon this would happen and what the role of local library reference services would be in 2015.
- Participants in five of six groups stated that the number of questions answered by second level reference providers would continue to decline and the need for – and use of – that for that service would be reduced over the next few years.
- Participants in two of the six sites expect the number of second level reference providers to be reduced by 2007 and participants in one site expect the service to be gone completely within two years.
- Participants in all groups identified training for library staff as an ongoing need from 2007 through 2010 and participants in the four of the six sites felt that training was going to be needed through 2015. Participants in the other two sites didn't think that public library staff were going to be providing a lot of direct reference services by 2015 so they wouldn't need training.
- Participants in all six sites hope to have subsidized access to fee-based information resources for themselves and their clients – a seamless interface to the information for all users. Some participants expect that access in 2007, most hope to have it by 2010, and all believe that it will be available in 2015.
- Participants in all six sites talked about serving multilingual users. However, only two sites included multilingual services as a second level reference service for the future.

OTHER THEMES, TRENDS, AND COMMENTS

Participants were given an opportunity to make final comments at the end of each focus group. A variety of themes emerged:

- Any change in the way second level reference services are provided should include a transition period.
- Smaller and poorer libraries will need financial help to participate in centralized reference services.
- 'Ask Now,' as currently configured, is not providing effective service. If 'Ask Now' is going to serve as a model for centralized statewide information services it needs to be significantly changed and improved.
- There will be a continuing need for multilingual information services in California. The new statewide catalog should be multilingual.
- Public libraries currently serve as group purchasing and processing agencies for print and media materials that are made available to local users. That role should be expanded to the purchase of fee-based information resources.
- As the library's information role decreases, other roles are becoming more important, particularly the popular materials or current topics and titles role. Consideration should be given to redirecting state and system resources from information services to services that support this expanding role. Readers' advisory services are going to be more important and reference staff will need training to provide this service.

Access to Databases or Expert Back-Up?

Participants in five of six sites were asked to choose between access to fee-based databases and a person to provide expert back-up. These are their responses:

Site	Databases	Person	Total
LA	42	25	67
SD	0	0	0
SB	17	1	18
SLO	13	0	13
Tulare	10	1	11
SAC	38	2	40
Total	120	29	149

Overall, 80% of the participants selected the databases instead the personal backup. However, almost everyone who selected the personal back-up was at the Los Angeles site. An overwhelming 95% of the participants at the other four sites in which the question was asked selected access to fee-based databases. A participant at one site said: "I finally voted with my head and not my heart. I know that I made the right choice, but it was hard."

RECOMMENDATIONS

1. Merge all of the existing second level question answering functions into one or two locations as soon as possible. This is clearly the near term expectation of most of the participants of the focus groups lead by Nelson and Mayo and the focus groups held in the Bay area. It is important to commit to some visible change as the result of these focus groups, if librarians are to remain engaged in a re-visioning process on a statewide level.
2. Changes in the provision of second level reference services imply changes in the distribution of state/system resources. It is important that all of the information/reference services being supported by state/system resources be evaluated at the same time. All of these services should be assessed for use, value, and effectiveness, not just those discussed during the focus groups.

Identify all of the reference and information services being supported in part or wholly by state and/or system funding (e.g. system second level reference, Librarians' Index to the Internet, Ask Now, 24/7, etc.). Collect data about all of these services. Recommended metrics for each service include:

- Total cost
 - Total number of users
 - Cost per user
 - Number and type of access point (e.g. physical, phone, Internet, etc.)
 - Trends in use of the past five years
 - California librarians' perceptions of the use, value, and effectiveness of each service (data to be collected through an online survey structured much like the data-collection form used in the six focus groups lead by Nelson and Mayo)
3. Focus the next round of discussions, scheduled to be facilitated by Maureen Sullivan later this year, on the system services remaining after question answering is centralized. One objective should be to identify those services that are truly distance sensitive and can be delivered most effectively by a geographically nearby organization.
 4. Continue to provide centrally coordinated training, both face to face and online. Provide subsidies for underfunded and geographically remote libraries to ensure their ability to participate.

Increase the number and scope of the online training offerings to address the barriers of timing and geography that inhibit participation now. Offer online learning opportunities beyond the PDF file and Word document workshop materials now offered by Infopeople. Consider hiring or contracting with skilled online learning designers to develop interactive courseware. License/subsidize

appropriate commercial courseware, or work with library suppliers to load their courseware for training on their products.

5. Begin planning to provide subsidized access to fee-based databases for libraries and the public on a state-wide basis. Ensure that these resources are clearly identified as provided by the State of California for use by its citizens. Plan for some form of statewide user authentication to support access by registered borrowers of libraries that don't have patron authentication functions in place.
6. Develop a plan to continue to make local records available to all residents of California in an increasingly electronic information environment. The plan may include some combination of digitization of local records and document delivery, among other options.

APPENDICES

- A. Handouts
- B. Current Second Level Reference Services: Priority, Value, Effectiveness
- C. Words Describing First and Second Level Reference Services in 2005
- D. Words Describing First and Second Level Reference Services in 2015
- E. First and Second Level Reference Services in 2007, 2010, and 2015
 - 1. Los Angeles Focus Group
 - 2. San Diego Focus Group
 - 3. San Bernardino Focus Group
 - 4. San Luis Obispo Focus Group
 - 5. Tulare Focus Group
 - 6. Sacramento Focus Group (Includes Chico and Modesto Teleconferences)
- F. Summary of Other Meetings on the Future of Reference Services in California
 - 1. Summary of the BALIS Report: *The Role of Reference and Second-Level Reference in Selected CLSA Systems in California: Preliminary Report*
 - 2. Summary of the MOBAC Report: *Future of Reference Focus Group*

CALIFORNIA REFERENCE SERVICE FOCUS GROUPS

FIRST AND SECOND LEVEL REFERENCE: CURRENT TRENDS AND FUTURE NEEDS

Facilitated By
Sandra Nelson and Diane Mayo

July 18@ LAPL
July 19 @ San Diego area
July 20 @ Riverside area
July 21 @ San Luis Obispo area
July 25 @ Fresno area
July 26 @ Sacramento area

CALIFORNIA REFERENCE SERVICE FOCUS GROUPS FIRST AND SECOND LEVEL REFERENCE: CURRENT TRENDS AND FUTURE NEEDS

Agenda

- 9:30 Introductions – All
- 9:35 Reference Services in 2005 - All
- 9:40 Current Second Level Reference Services
 List and Describe - All
 Evaluate –Groups
- 10:15 Break
- 10:30 Reference Services Then and Now – Diane Mayo
- 11:00 Reference Services in 2015
- 11:15 First Level Reference Services in 2007, 2010, and 2015
 Describe the Clients and Their Needs – Groups
 Describe the First Level Reference Services - Groups
- 11:45 Second Level Reference Services in 2007, 2010, and 2015
 Define What Will Be Needed to Support First Level Reference –
 Groups
 Describe Ways to Provided Needed Support - Groups
- 12:20 Summary
- 12:30 Adjourn

CURRENT SECOND LEVEL REFERENCE SERVICES

List the services provided by your second-level reference provider below and then rate the effectiveness and value of the each service you listed.

1. _____

Value	Very Valuable		Somewhat Valuable		Not At All Valuable
	1	2	3	4	5

Effectiveness	Very Effective		Somewhat Effective		Not At All Effective
	1	2	3	4	5

2. _____

Value	Very Valuable		Somewhat Valuable		Not At All Valuable
	1	2	3	4	5

Effectiveness	Very Effective		Somewhat Effective		Not At All Effective
	1	2	3	4	5

3. _____

Value	Very Valuable		Somewhat Valuable		Not At All Valuable
	1	2	3	4	5

Effectiveness	Very Effective		Somewhat Effective		Not At All Effective
	1	2	3	4	5

4. _____

Value	Very Valuable		Somewhat Valuable		Not At All Valuable
	1	2	3	4	5

Effectiveness	Very Effective		Somewhat Effective		Not At All Effective
	1	2	3	4	5

5. _____

Value	Very Valuable		Somewhat Valuable		Not At All Valuable
	1	2	3	4	5

Effectiveness	Very Effective		Somewhat Effective		Not At All Effective
	1	2	3	4	5

Demographics of Internet Users

Here is the % of each group who use the internet. As an example, 65% of adult women use the internet.

<i>Use the internet</i>	
Total Adults	67%
Women	65
Men	68
<i>Age</i>	
18-29	84%
30-49	76
50-64	64
65+	27
<i>Race/ethnicity</i>	
White, Non-Hispanic	67%
Black, Non-Hispanic	58
English-speaking Hispanic	68
<i>Community type</i>	
Urban	69%
Suburban	69
Rural	58
<i>Household income</i>	
Less than \$30,000/yr	48%
\$30,000-\$50,000	71
\$50,000-\$75,000	85
More than \$75,000	92
<i>Educational attainment</i>	
Less than High School	28%
High School	57
Some College	79
College +	89

Source: Pew Internet & American Life Project, February-March 2005 Tracking Survey. Please note that the February-March 2005 survey employed split form questioning in which half the sample was asked our traditional Q6 internet use question and the other half was asked a new two-part internet use question. N=2,201 adults, 18 and older. Margin of error is $\pm 2\%$ for results based on the full sample.

Last updated May 18, 2005.

Internet Activities		
<i>About 67% of American adults use the internet. That translates into approximately 135 million people. Here are some of the things they do online:</i>	<i>Percent of internet users who report this activity</i>	<i>Most recent survey date</i>
Send e-mail	91	February-March 2005
Use a search engine to find information	84	May-June 2004
Search for a map or driving directions	84	February 2004
Do an internet search to answer a specific question	80	Nov-Dec 2003
Research a product or service before buying it	78	February-March 2005
Check the weather	78	November 2004
Look for info on a hobby or interest	77	November 2004
Get travel info	73	May-June 2004
Get news	72	February-March 2005
Buy a product	67	November 2004
Surf the Web for fun	66	November 2004
Look for health/medical info	66	December 2002
Look for info from a government website	66	August 2003
Buy or make a reservation for travel	62	November 2004
Go to a website that provides info or support for a specific medical condition or personal situation	58	November 2004
Research for school or training	57	January 2005
Watch a video clip or listen to an audio clip	56	November 2004
Look up phone number or address	54	February 2004
Do any type of research for your job	51	February-March 2005
Look for political news/info	49	May-June 2004

Source: Pew Internet & American Life Project Tracking surveys (March 2000 - present). Please note that some items have been abbreviated. Full question wording for each activity is available in the questionnaire.

**Prior to January 2005, item wording was slightly different for the items marked with an asterisk. Please see questionnaires for question wording changes.*

Last updated: May 18, 2005

SYSTEM REFERENCE PROGRAM WORKLOAD HISTORY

SYSTEM	Actual Reference Questions									
	93/94	94/95	95/96	96/97	97/98	98/99	99/00	2000/01	2001/02	2002/03
BALIS	1,818	1,557	1,249	918	1,450	813	551	499	450	569
BLACK GOLD	1,785	1,088	913	941	1,050	632	599	490	269	295
49-99	849	798	826	813	900	605	531	418	410	412
INLAND	2,674	1,839	1,343	1,484	1,610	1,229	1,476	1,759	2,354	1,800
MCLS	6,202	6,005	5,003	5,372	6,925	4,152	3,226	2,947	3,169	2,867
MOBAC	949	994	817	660	666	318	58	106	97	141
MVLS	1,023	989	828	621	900	425	409	430	440	283
NORTH BAY	1,286	1,481	1,326	1,737	1,787	1,024	1,015	849	931	881
NORTH STATE	906	1,091	1,151	1,205	1,296	854	714	639	372	432
PLS	498	613	1,501	619	864	331	369	338	326	353
SJVLS	2,656	3,056	2,817	2,187	3,065	1,290	1,245	1,213	603	703
SANTIAGO	494	550	462	558	477	503	397	371	295	248
SERRA	1,568	1,598	1,477	1,297	1,400	1,282	1,248	1,020	908	1,203
SVLS	712	1,247	1,501	537	1,075	365	235	306	295	535
SOUTH STATE	186	260	279	203	512	133	143	157	157	133
TOTAL	23,606	23,166	21,493	19,152	23,977	13,956	12,216	11,542	11,076	10,855

Decrease in questions over 10 years: 54%

**16.75 02/03 FTE staff or 648 questions
per FTE**

LIBRARY SERVICE STATISTICS COMPARISON 1993 TO 2003

	1993 NATIONWIDE DATA		2003 NATIONWIDE DATA		% Change from '93 to '03
Population Served	261,080,368		283,831,151		8.71%
Total Expenditures	5,086,093,021	\$19.48 per capita	8,300,116,435	\$29.24 per capita	50.11%
Staff Expenditures	3,082,083,645	60.60% of budget	5,463,469,857	65.82% of budget	8.62%
Collection Expenditures	707,236,576	13.91% of budget	1,154,075,943	13.90% of budget	-0.01%
Total Visits	961,791,956	3.7 per capita	1,284,352,169	4.5 per capita	22.83%
Circulation	1,595,167,482	6.1 per capita	1,965,115,778	6.9 per capita	13.32%
Reference Questions	259,376,665	1.0 per capita	302,348,229	1.1 per capita	7.22%

	1993 CALIFORNIA DATA		2003 CALIFORNIA DATA		% Change from '93 to '03
Population Served	31,509,515		35,570,630		12.89%
Total Expenditures	602,394,287	\$19.12 per capita	917,330,786	\$25.79 per capita	34.89%
Staff Expenditures	372,790,370	61.88% of budget	626,660,089	68.31% of budget	10.39%
Collection Expenditures	62,635,128	10.40% of budget	104,758,574	11.42% of budget	9.83%
Total Visits	118,508,351	3.8 per capita	149,240,619	4.2 per capita	11.55%
Circulation	158,929,980	5.0 per capita	198,536,451	5.6 per capita	10.66%
Reference Questions	44,567,021	1.4 per capita	35,758,984	1.0 per capita	-28.92%

First-Level Reference Services – 2007, 2010, 2015

	Client	Information Needs	First Level Reference Services
2007			
2010			
2015			

PRIORITY, VALUE, AND EFFECTIVENESS BY SITE

1. Value of Second Level Reference Services by Site: Sorted by Total Priority

	Priority*	Chico & Modesto	LA	SAC	SB	SD	SLO	Tulare	Summary
Answer Questions/Expert reference	1 (162)	1.42	1.23	1.96	1.75	1.32	2.08	1.86	1.56
Training/Professional development	2 (149)	1.33	1.48	1.73	2.05	1.67		1.91	1.64
Access to other resources/Special Materials	3 (94)		1.33		1.26	1.69		1.90	1.44
Communication/Networking	4 (80)	1.75	1.74	1.94	2.09	1.79			1.84
ILL	5 (39)	1.33		1.31	1.44	1.00			1.31
Webliographies/Bibliographies	6 (37)		1.62	1.67		2.00			1.65
Survey or indexing of local resources/Special collections in other libraries	7 (31)	1.33	1.83	1.67		3.00		1.44	1.65
Negotiate database fees	7 (31)	1.43		1.50					1.48
Consultation	9 (24)		2.00			1.40			1.88
Lend/Supplemental materials	10 (20)				2.78	1.45			2.05
Staffing for '24/7'	11 (15)	1.83		2.00					1.93
Statistics/Data	12 (13)		1.62						1.62
Grant writing for reference support materials	12 (13)					2.00		1.86	1.92
Trends	14 (12)		1.33	1.83					1.58
Web site (about system)	15 (8)				2.88				2.88
Purchasing materials for host lib.	16 (5)	1.33		2.00					1.60
Digitized local resources	17 (4)							1.75	1.75
System coordination	18 (2)					2.50			2.50
Collection subject depth	18 (2)							2.50	2.50

2. Value of Second-Level Reference Services by Site: Sorted by Average Value

	Priority*	Chico & Modesto	LA	SAC	SB	SD	SLO	Tulare	Summary
ILL	5 (39)	1.33		1.31	1.44	1.00			1.31
Access to other resources/Special Materials	3 (94)		1.33		1.26	1.69		1.90	1.44
Negotiate database fees	7 (31)	1.43		1.50					1.48
Answer Questions/Expert reference	1 (162)	1.42	1.23	1.96	1.75	1.32	2.08	1.86	1.56
Trends	14 (12)		1.33	1.83					1.58
Purchasing materials for host lib.	16 (5)	1.33		2.00					1.60
Statistics/Data	12 (13)		1.62						1.62
Training/Professional development	2 (149)	1.33	1.48	1.73	2.05	1.67		1.91	1.64
Webliographies/Bibliographies	6 (37)		1.62	1.67		2.00			1.65
Survey or indexing of local resources/Special collections in other libraries	7 (31)	1.33	1.83	1.67		3.00		1.44	1.65
Digitized local resources	17 (4)							1.75	1.75
Communication/Networking	4 (80)	1.75	1.74	1.94	2.09	1.79			1.84
Consultation	9 (24)		2.00			1.40			1.88
Grant writing for reference support materials	12 (13)					2.00		1.86	1.92
Staffing for '24/7'	11 (15)	1.83		2.00					1.93
Lend/Supplemental materials	10 (20)				2.78	1.45			2.05
System coordination	18 (2)					2.50			2.50
Collection subject depth	18 (2)							2.50	2.50
Web site (about system)	15 (8)				2.88				2.88

*Priority = This is based on the number of people who selected the service. The first number indicates the priority ranking of the service. The number in parentheses indicates the number of participants who selected the service. A total of 174 people selected one or more services.

3. Effectiveness of Second Level Reference Services by Site: Sorted by Total Priority

	Priority	Chico & Modesto	LA	SAC	SB	SD	SLO	Tulare	Summary
Answer Questions/Expert Reference	1 (162)	1.75	1.33	2.00	1.85	1.47	1.77	2.14	1.66
Training/Professional Dev.	2 (149)	2.00	1.89	2.27	2.65	1.81		3.09	2.15
Access to Other Resources/Special Materials	3 (94)		1.55		1.53	2.13		2.50	1.74
Communication/Networking	4 (80)	1.50	2.17	2.25	2.45	2.00			2.16
ILL	5 (39)	2.00		1.50	1.78	1.20			1.64
Webliographies/Bibliographies	6 (37)		1.77	2.33		1.00			1.86
Survey or indexing of local resources/Special Collections in other libraries	7 (31)	1.17	2.00	1.67		3.00		1.78	1.77
Negotiate database fees	7 (31)	2.00		2.50					2.39
Consultation	9 (24)		2.11			1.40			1.96
Lend/Supplemental Materials	10 (20)				2.78	1.82			2.25
Staffing for '24/7'	11 (15)	2.00		2.11					2.07
Statistics/Data	12 (13)		1.77						1.77
Grant writing for reference support materials	12 (13)					2.00		2.14	2.08
Trends	14 (12)		1.83	3.00					2.42
Web site (about system)	15 (8)				3.25				3.25
Purchasing materials for host lib.	16 (5)	1.67		2.00					1.80
Digitized local resources	17 (4)							2.00	2.00
System Coordination	18 (2)					2.00			2.00
Collection subject depth	18 (2)							2.50	2.50

4. Effectiveness of Second Level Reference Services by Site: Sorted by Total Average Effectiveness

	Priority	Chico & Modesto	LA	SAC	SB	SD	SLO	Tulare	Summary
ILL	5 (39)	2.00		1.50	1.78	1.20			1.64
Answer Questions/Expert Reference	1 (162)	1.75	1.33	2.00	1.85	1.47	1.77	2.14	1.66
Access to Other Resources/Special Materials	3 (94)		1.55		1.53	2.13		2.50	1.74
Survey or indexing of local resources/Special Collections in other libraries	7 (31)	1.17	2.00	1.67		3.00		1.78	1.77
Statistics/Data	12 (13)		1.77						1.77
Purchasing materials for host lib.	16 (5)	1.67		2.00					1.80
Webliographies/Bibliographies	6 (37)		1.77	2.33		1.00			1.86
Consultation	9 (24)		2.11			1.40			1.96
Digitized local resources	17 (4)							2.00	2.00
System Coordination	18 (2)					2.00			2.00
Staffing for '24/7'	11 (15)	2.00		2.11					2.07
Grant writing for reference support materials	12 (13)					2.00		2.14	2.08
Training/Professional Dev.	2 (149)	2.00	1.89	2.27	2.65	1.81		3.09	2.15
Communication/Networking	4 (80)	1.50	2.17	2.25	2.45	2.00			2.16
Lend/Supplemental Materials	10 (20)				2.78	1.82			2.25
Negotiate database fees	7 (31)	2.00		2.50					2.39
Trends	14 (12)		1.83	3.00					2.42
Collection subject depth	18 (2)							2.50	2.50
Web site (about system)	15 (8)				3.25				3.25

*Priority = This is based on the number of people who selected the service. The first number indicates the priority ranking of the service. The number in parentheses indicates the number of participants who selected the service. A total of 174 people selected one or more services.

5. Frequency of Selection (Priority) by Site: Sorted by Overall Priority

	Total #	Chico & Modesto		LA		SAC		SB		SD		SLO		Tulare	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%
Answer Questions/Expert Reference	162	12	7.4%	57	35.2%	27	16.7%	20	12.3%	19	11.7%	13	8.0%	14	8.6%
Training/Professional Dev.	149	15	10.1%	56	37.6%	26	17.4%	20	13.4%	21	14.1%		0.0%	11	7.4%
Access to Other Resources/Special Materials	94		0.0%	49	52.1%		0.0%	19	20.2%	16	17.0%		0.0%	10	10.6%
Communication/Networking	80	4	5.0%	35	43.8%	16	20.0%	11	13.8%	14	17.5%		0.0%		0.0%
ILL	39	9	23.1%		0.0%	16	41.0%	9	23.1%	5	12.8%		0.0%		0.0%
Webliographies/Bibliographies	37		0.0%	26	70.3%	9	24.3%		0.0%	2	5.4%		0.0%		0.0%
Survey or indexing of local resources/Special Collections in other libraries	31	6	19.4%	12	38.7%	3	9.7%		0.0%	1	3.2%		0.0%	9	29.0%
Negotiate database fees	31	7	22.6%		0.0%	24	77.4%		0.0%		0.0%		0.0%		0.0%
Consultation	24		0.0%	19	79.2%		0.0%		0.0%	5	20.8%		0.0%		0.0%
Lend/Supplemental Materials	20		0.0%		0.0%		0.0%	9	45.0%	11	55.0%		0.0%		0.0%
Staffing for '24/7'	15	6	40.0%		0.0%	9	60.0%		0.0%		0.0%		0.0%		0.0%
Statistics/Data	13		0.0%	13	100.0%		0.0%		0.0%		0.0%		0.0%		0.0%
Grant writing for ref support materials	13		0.0%		0.0%		0.0%		0.0%	6	46.2%		0.0%	7	53.8%
Trends	12		0.0%	6	50.0%	6	50.0%		0.0%		0.0%		0.0%		0.0%
Web site (about system)	8		0.0%		0.0%		0.0%	8	100.0%		0.0%		0.0%		0.0%
Purchasing materials for host libraries	5	3	60.0%		0.0%	2	40.0%		0.0%		0.0%		0.0%		0.0%
Digitized local resources	4		0.0%		0.0%		0.0%		0.0%		0.0%		0.0%	4	100.0%
System Coordination	2		0.0%		0.0%		0.0%		0.0%	2	100.0%		0.0%		0.0%
Collection subject depth	2		0.0%		0.0%		0.0%		0.0%		0.0%		0.0%	2	100.0%

WORDS DESCRIBING FIRST AND SECOND LEVEL REFERENCE SERVICES IN 2005

Write one word to describe local reference services in 2005 and one word to describe second level reference services in 2005.

San Bernardino

First Level Reference - 2005	Second Level Reference - 2005
2 Adequate	2 24-7
2 Quick	2 Slow/too slow
1 Challenging	2 Wonderful/ excellent
1 Customer service	1 Authoritative
1 Databases	1 Challenging
1 Diminishing	1 Complete
1 Effective	1 Deeper
1 Essential	1 Dying
1 Growing	1 Email
1 Hard	1 Handy
1 Helpful	1 Harder
1 ILS	1 Long
1 Multi-faceted	1 Necessary?
1 Needy	1 Needy
1 OK	1 Practical
1 Ready	1 Research
1 Superior	1 Timeliness
1 Thorough	1 Uncertain
1 To the point	

San Diego

First Level Reference - 2005	Second Level Reference - 2005
3 Changing	3 Life-saver/ amazing/valuable
2 Fast/quick	3 Serra
1 Always	3 Deep/in-depth
1 Chaotic	2 Seldom
1 Easy	1 24/7 service
1 Impact	1 Automobile
1 Increasing	1 Average
1 Learn	1 Complimentary
1 Local	1 Declining
1 Minimal	1 Interesting
1 Necessary for access	1 Limited
1 Newspaper	1 Necessary
1 Online	1 Practice
1 Providers	1 Responsive
1 Reference librarians	
1 Service desk	
1 Sporadic	
1 Varied	

San Luis Obispo

First Level Reference - 2005	Second Level Reference - 2005
2 Personal	2 Infrequent/little
1 Active	2 Underutilized/too few questions
1 Busy	1 Esoteric
1 Changed	1 Excellent
1 Declining	1 Expensive
1 Desk	1 Helpful
1 Electronic	1 Ignored
1 Fast	1 Remote
1 Moderate	1 Research
1 New	1 Sheet-music
1 Timely	1 Slow
1 Transitioning	1 Stumpers
1 Underutilized	

Tulare

First Level Reference - 2005	Second Level Reference - 2005
1 Complicated	2 In-depth
1 Constant	1 Available
1 Critical	1 Complex
1 Developing	1 Essential
1 Limited	1 Excellent
1 Personalized	1 Involved
1 Public	1 Online
1 Simple	1 OZ
1 Surface	1 Slow
1 Telepathy	

Los Angeles

First Level Reference - 2005		Second Level Reference - 2005	
11	Immediate/quick/instant/fast/now	6	In-depth
4	Personal	5	Thorough
3	Ready	4	Fabulous/great/superstar/savior
3	Responsive	3	MCLS
2	Basic	2	Detail
2	Diversity	2	Difficult questions
1	Adequate	2	Expensive
1	Appreciated	2	Promptness
1	Assignments	1	Accuracy
1	Availability	1	Airport antennas
1	Busy	1	Antique Price
1	Client-centered	1	Guides
1	Critical		Available
1	Diffuse	1	Bibliographies
1	Diligence	1	Biography
1	Disorganized	1	Complexities
1	Eclectic	1	Easy
1	Economic based	1	Efficient
1	Ever-changing	1	Elite
1	Excellent	1	Expanding
1	Expert	1	Expertise
1	Flabbergasted	1	Extended
1	Friendly	1	Helpful
1	Glendale	1	Immediate
1	Hard	1	Important
1	History	1	Inexpensive
1	Hometown	1	Infrequent
1	LAPL	1	Later
1	Local	1	Library-centered
1	Low income rental	1	More-visible
1	Obituaries	1	Necessary
1	Online	1	Next
1	Patience	1	Non-existent
1	Questions	1	Reassuring
1	Sad	1	Research
1	Supplementary	1	Specialized
1	Surface	1	Specific
1	Thorough	1	Supplementary
1	Uneven	1	Time
1	Yes	1	Time-consuming
		1	Uncommon
		1	Underutilized
		1	Work smarter

Sacramento

First Level Reference - 2005		Second Level Reference - 2005	
2	Efficient	2	Back-up expertise
2	Historical/history	2	Complex
1	Busy	2	Hard/harder
1	Carol	1	Comfort
1	Common	1	Difficult
1	Easy	1	Don't
1	Familiar	1	Expanded
1	Fewer	1	Extraordinary
1	Flexible	1	Friendly
1	Fun	1	Helpful
1	Genealogy	1	Infrequent
1	Helpful	1	Judy
1	Indispensable	1	Legal questions
1	Internet	1	More knowledgeable
1	Jumping		
1	Overwhelmed	1	MVLS
1	Personal service	1	Not used
1	Self-help options	1	Research
1	Sophisticated	1	Sharing
1	Transitional	1	Strange
1	Uneven	1	Transitional
1	Varied	1	Underused

**Chico and Modesto
Teleconference Sites**

3	Quick	2	Stumpers
1	Answers	2	Difficult
1	Catalog	1	Challenging
1	Easy	1	Correct
1	Good collections	1	Helpful
1	Google	1	Internet
1	Hopeful	1	Involved
1	Immediate	1	More digging
1	Open	1	Quality
1	Personal	1	Rare
1	Service	1	Specialized
1	Some digging	1	Time-consuming
1	Triage	1	Uninterrupted
1	Unpredictable	1	Well-researched

WORDS DESCRIBING FIRST AND SECOND LEVEL REFERENCE SERVICES IN 2015

Write one word to describe local reference services in 2015 and one word to describe second level reference services in 2015.

San Bernardino

First Level Reference - 2015	Second Level Reference - 2015
8 Digital/electronic/ virtual	6 Gone/dead/none/ non-existent/null
3 Instant/ instantaneous/fast	4 Digital/electronic/ virtual
2 Scarce/ diminishing	1 Instant
1 Value-added	1 Unlimited
1 Depressing	1 Depressing
1 Marginalized	1 Irrelevant
1 Non-existent	1 Marginalized
1 Complete	1 Obsolete
1 Distance	1 Unimaginable
1 Facilitator	1 Complex
1 School-oriented	1 Consolidated
1 Self-service	1 Home
1 Unlimited	1 Mediated
	1 Multi-digital
	1 Partner

San Diego

First Level Reference - 2015	Second Level Reference - 2015
10 Online/virtual/ automated/ electronic/digital/ Web-based	4 Online/networked/ web-net/technical
3 Personalized	1 24/7
2 Instant/immediate	1 Changed
1 Access	1 Coordinated
1 Collaborative	1 Databases
1 Demand	1 Delivery
1 Depersonalized	1 Determined
1 Expanded	1 Downloadable
1 Gone	1 Esoteric
1 Librarians	1 Extensive
1 Remote access	1 Extinct
1 Self-service	1 Faster
1 Unlimited	1 In-depth
	1 Integrated
	1 Integrity
	1 Obsolete
	1 Remotely
	1 Seldom
	1 Smaller
	1 Tardy
	1 Unlimited

San Luis Obispo

First Level Reference - 2015	Second Level Reference - 2015
2 Electronic/online	6 Absent/gone/ non-existent
2 Personalized	2 Digital/electronic
2 Non-present/ remote	1 Avoided
1 Changing	1 Esoteric
1 Contracted	1 Irrelevant
1 E-personal	1 Limited
1 Guides	1 Supportive
1 Invisible	1 Technology
1 Multi-lingual	1 Training
1 Service	
1 Technology	
1 Value-added	

Tulare

First Level Reference - 2015	Second Level Reference - 2015
2 Advanced/ Sophisticated	7 Gone/non-existent/ not there
2 Electronic	2 Digital/virtual
2 Exists/here	2 Extensive/in-depth
2 Immediate/quick	1 Challenging
1 Comprehensive	1 Immediate
1 Diverse	1 Unnecessary
1 Narrow	
1 Online	
1 Sporadic	
1 Totally dispersed	

Los Angeles

First Level Reference - 2015	Second Level Reference - 2015
12 Personal	13 Digital/electronic/ hardwired/Internet
11 Digital/electronic/ online/virtual/ Internet	-based/technology
6 Fast/immediate/ instantaneous/ quick/speed	5 Dwindling/less use/not-so- much/rare/scarc
4 Education/ instruction/teach	4 Collaborative/ shared
4 Remote	4 Direct access to user
2 Experts	3 Complex
1 Broader	3 Global
1 Bypass	3 Networks
1 Client-centered	3 Non-existent
1 Complete	2 Immediate/very rapid
1 Conduit	2 Research
1 Consultation	1 Authentication
1 Custom	1 Connective
1 Email	1 Consortia
1 Evaluative	1 Customized
1 Flexible	1 Minimal
1 Gone	1 Minutes
1 Handy	1 Necessary
1 Interactive	1 Old books
1 Irrelevant	1 One day answers
1 Local info	1 Personal
1 Multi-formatted	1 Segment-oriented
1 Navigate	1 Specialized
1 Readers advisory	1 Statewide databases
1 Re-envisioned	1 Streaming
1 Referral	1 Thorough
1 Seamless	1 Trainers
1 Self-service	1 Trend-spotters
1 Shared	1 Universal
1 Technology questions	1 Unmediated
1 Tending technology	1 Verbal
1 Unique	
1 Unusual	
1 Useful	
1 Video streaming	

Sacramento

First Level Reference - 2015	Second Level Reference - 2015
3 Virtual	6 Gone/extinct/dead
2 Digital	2 Digital
2 Educational/ instructional	2 Electronic
2 Personalized/ personal	2 Non-existent
2 Self-service	1 Aggregation
1 24/7 access	1 Bureaucratic
1 Accessible	1 Comprehensive
1 Books	1 Computer
1 Coaching	1 Dinosaur
1 Contact	1 Expanding
1 Creative	1 Immediate
1 Different	1 Internet
1 Dispersed	1 Invisible
1 Expertise	1 Local
1 Exterior	1 Miniscule
1 Instantaneous	1 Obsolete
1 Interactive	1 Remote
1 Internet	1 Resources
1 Marginalized	1 Self-service
1 Millennial	1 Superior
1 Nimble	1 Switchboard
1 Remote	1 Unnecessary
1 Technical	1 What's that?
1 Transparent	
1 Unmediated	
1 Widespread	

**Chico and Modesto
Teleconference Sites**

2 Electronic	2 Non-existent
2 Personal/ personalized	1 Complex
2 Remote	1 Coordinating
1 Chaos	1 Died
1 Digital	1 Digital
1 Digitized	1 Don't know
1 Home equipment	1 Formal
1 Individualized	1 Global
1 Instant	1 Overloaded
1 Limit	1 Predominant
1 Outreach	1 Remote
1 Wireless	1 Superseded
	1 Supportive
	1 Unfunded

REFERENCE SERVICES CURRENT TRENDS AND FUTURE NEEDS

Los Angeles Focus Group – 7/18/05

Describe the clients who will use the reference services provided by your local library.

2007	2010	2015
People who want local information	Increasing segmentation of clients – people needing more specialized information	Clients who need access to proprietary information
More people who do not speak English as a first language	Continuing increase in people who do not speak English as a first language	Still have a large group of people who do not speak English as a first language
Older people with no computer	People needing career counseling	People who want to access electronically information anonymously
Tech savvy kids	Genealogists	People who expect 24/7 service
People from lower economic levels	People with less ability to pay for online information	Personalized services
People who bring their own computers	More electronic clients	One-stop shopping
People who need help to find what they want	People who prefer to talk to a real person	
Students		
People who cannot operate in an online environment		

Describe the information needs your clients will have.

2007	2010	2015
CE	CE	??
Medical	Medical	Fewer assignments
Legal	Legal	
Financial	Financial	
Do-It-Yourself	Do-It-Yourself	
Career/Business	Career/Business	
Local History	Local History	
School assignments	School assignments	
How to use technology	How to uses technology	
	More demand for specialized information	
	Personal security	

Describe the services your library will provide to meet the information needs of your clients.

2007	2010	2015
Electronic delivery/virtual reference	Portable information	Access to proprietary information on fee-based data-bases
More specialized training for users	Information that can be pushed to the user based on a personal profile	Web-based services
Continued pressure to juggle budgets to afford electronic resources at expense of other services	Excel in providing local information	
Web-based services	Access to proprietary information on fee-based data-bases	
Consultation role with people looking for information	Consultation role with people looking for information	

Describe the second tier reference support you will need to support the services your library will provide to meet the information needs of your clients in 2015.*

- Subsidized databases
- Outsource local reference to second-tier, statewide, or national virtual provider; patron goes direct to virtual provider
- Expert backup for local reference staff
- Training – how to use and refer to second-tier provider
- Document delivery
- Information network
- Multilingual services

What is more important – access to fee-based databases or a person to provide expert backup?

- Databases = 42
- Person = 25

What other information do you think is important to consider when evaluating second tier reference services?

- We need a transitional period as we move to fully electronic services.
- Review second-tier reference regularly and pay attention to trends.
- Find a balance between pushing expertise and pulling local libraries up to speed.

* There were too many people at the LA focus group to discuss the second-tier reference services in 2007 and 2010.

REFERENCE SERVICES CURRENT TRENDS AND FUTURE NEEDS

San Diego Focus Group – 7/19/05

Describe the clients who will use the reference services provided by your local library.

2007	2010	2015
Blend of computer literate and computer illiterate	Traditional users (use print in-house) will be in the minority	Computer intuitive
Move AV oriented users	Users wanting things not available electronically – local history	Under-educated
Limited English speaking users	Increasing # of people with limited English speaking skills	Limited English-speaking – numbers stabilized from 2010
Clients connecting from a remote access point	Users who want to take advantage of fee-based services	
Students	Users who want specialized information and information that is available in hard copy only	
Seniors	Larger gap between the educated and the uneducated – we will get more uneducated users	
All		

Describe the information needs your clients will have.

2007	2010	2015
Home depot approach – do-it-yourself	Access to fee-based databases	People seeking experts
Improved searching skills	Specialized information not easily obtainable over the Web	Blended information
	Even more do-it-yourself	Electronic archives pre-1994
	New/newer/newest	The issue will no longer be the information itself, instead it will be the path to the information
Services in other languages	Services in other languages	Services in other languages

Describe the services your library will provide to meet the information needs of your clients.

2007	2010	2015
24/7 service	Training for the people who can't find information	Integrated technologies – everything will work together
Internet classes	Majority of reference work will not be in-house	Based on modalities other than print
Online tutorials	Libraries will provide Web-based reference portals	Guides to help people
Technology compatible with the clients' technology	Help establish Web indexing standards	
Digitized local history		
Don't see a lot of changes in two years		

Describe the second tier reference support you will need to support the services your library will provide to meet the information needs of your clients.

2007	2010	2015
Coordinated training on resources	Coordinated training on resources	Coordinated training on resources
Maybe more centralization of databases	Centralized access to databases	Local library will be a conduit
Fewer second level reference centers and fewer people in them	Centralizing services	Seamless for interface for the client
Immediate gratification		Centralized access to fee-based databases
		Facilitate trends in technology
		Second level support morphs into single centralized service point that provides all needed services

What other information do you think is important to consider when evaluating second tier reference services?

- Smaller and poorer libraries will need support to participate in centralized information services

REFERENCE SERVICES CURRENT TRENDS AND FUTURE NEEDS

San Bernardino Focus Group – 7/20/05

Describe the clients who will use the reference services provided by your local library.

2007	2010	2015
Students	Students – but fewer	Virtual users from remote sites
Seniors	More seniors	
Parents		People who need back-up equipment
Technophobes	Technophobes – dying breed	
Historic researchers	Local history buffs	
Business people	Serious researchers	
People who don't speak English as a first language	People who don't speak English as a first language – increasing numbers	
Have-nots (poor, uneducated)	Still work with have-nots	Economically disadvantaged
Significant population growth (undifferentiated by type)		

Describe the information needs your clients will have.

2007	2010	2015
Value-added services – people who need help using online resources	More access to digital resources	Need instant information
The Web will be the first level of service – the library will be the second level of service	Local history resources	Have complex information needs
Information in multiple formats		
Portable information		
Curriculum support		
Historic collections		

Describe the services your library will provide to meet the information needs of your clients.

2007	2010	2015
Information literacy classes	Informed and capable staff	Access to fee-based electronic information
Mediated Web searching	Still providing some mediated services, but less	Still providing some mediated services, but fewer
Access to fee-based electronic content	Access to fee-based electronic content	Very specialized information
	Library Web sites will provide disaggregated information (learning objects)	

Describe the second tier reference support you will need to support the services your library will provide to meet the information needs of your clients.*

2007	2010	2015
Training for staff		Providing access to fee-based electronic information (13)
Answer questions (10 of 20)		Training for staff
Moving toward centralized virtual service		Personal individual portals (digital genies) no library role for information (1)
		Access to local data from outside local area
		All virtual reference is centralized

What is more important – access to fee-based databases or a person to provide expert backup?

- Cooperative database purchasing at a real bargain price (not happy with current Califa pricing and discounts) = 17
- People = 1

What other information do you think is important to consider when evaluating second tier reference services?

- Rural libraries will need financial help to provide adequate access to electronic resources
- Secondary reference is less important than it was and will continue to lose value
- People want it NOW; they don't want to wait and they don't want referrals

*There was less consensus in this group than others, so counts were included in some instances.

REFERENCE SERVICES CURRENT TRENDS AND FUTURE NEEDS

San Luis Obispo Focus Group – 7/21/05

The libraries represented at this focus group have been outsourcing to North Bay Library Cooperative for two years; they receive one service – answer questions.

Describe the clients who will use the reference services provided by your local library.

2007	2010	2015
Students	Students – decreasing #s	More remote users
Seniors	Have-nots	Global users
Immigrants	More immigrants	People speaking more languages
Search-challenged	Seniors – increasing #s	
People without computers	Remote users – increasing #s	
Travelers	The techno-slow	
People wanting unique local information	People wanting unique local information – non-digitized	
Remote users	People in a hurry who want to outsource the question to a professional	

Describe the information needs your clients will have.

2007	2010	2015
Unique local information	Fast service – more timely response	Local information that has not been digitized
Help with Internet 101	Information in lots of digital formats delivered to people whenever and wherever they are	24/7 access
Help learning how to evaluate information resources – information literacy	The need for help in evaluating information resources will increase	
Disaggregated information	Receive information already authenticated or analyzed	
Citizenship		
Basic library information (hours, locations, online catalog, etc.)		

Describe the services your library will provide to meet the information needs of your clients.

2007	2010	2015
Drive-by reference – community-based reference librarians working out of the building	More electronic information support and less face to face	Still local history if not digitized
More patron instruction	IM or whatever is next	Its possible library information services will be redundant
Electronic collection of sites (Internet Librarian model)	Reference consultations – mediated assistance	
ILL	24/7 service	
Face to face – personal		
Reference will be less visible in the building		

Describe the second tier reference support you will need to support the services your library will provide to meet the information needs of your clients.

2007	2010	2015
Dead as we know it	Perhaps providing fee-based esoteric research on a contract basis in competition with private providers	Evolve into access to electronic answers anywhere, anytime, on any device
OR Change relationship with the 2 nd tier provider to add services like training		Artificial Intelligence
OR 2 nd tier services will become electronic and quick		Self-translating, multi-lingual

What is more important – access to fee-based databases or a person to provide expert backup?

- Cooperative databases = 13
- People = 0

What other information do you think is important to consider when evaluating second tier reference services?

- “Ask Now” and “24/7” will have to improve significantly if they are going to be effective in meeting end-user needs.
- Enhance existing infrastructure so that we are able to connect the user to information quickly and seamlessly.
- There will be decreasing use of any library information resources
- We will need to provide value-added services.

- Libraries will continue to be group buyer for fee-based electronic resources, perhaps in selected subject areas.
- Shift the money going into state and system support for information services to support high demand services being provided by local libraries.

REFERENCE SERVICES CURRENT TRENDS AND FUTURE NEEDS

Tulare Focus Group – 7/25/05

Describe the clients who will use the reference services provided by your local library.

2007	2010	2015
Students – Face to face service	Students – More remote access or students using library equipment	Fewer students, less face-to-face, much more remote access
Working adults	College distance students	Adults – much more remote access
Job seekers	More job seekers	Even more job seekers
Seniors	Seniors	Seniors will still want face-to-face service to meet social needs
Traditional users – 65 or over, non-technical, and desire face to face interactions	Non-traditional users	
Local history users and genealogists	Local history users and genealogists	Local history users and genealogists
Small business owners		
People with limited English-speaking skills	More people with limited English-speaking skills	Even more people with limited English-speaking skills

Describe the information needs your clients will have.

2007	2010	2015
Current and research information for homework reports	More of the information users need will be only available through online resources	Access to even more fee-based databases
A mix of print and electronic information	Some may need to use library equipment	Electronic information that can be downloaded to a variety of personal devices
Timeliness	Timely information	24/7 – immediate
Current information as soon as it is available	Information to supplement what people get from their own Web searches	Access to whatever the current technology is
How-to information	How-to information	
Information literacy skills	More wireless access	
Local history and genealogy information	Local history and genealogy information	Local history and genealogy information

Describe the services your library will provide to meet the information needs of your clients.

2007	2010	2015
Both access to information and the instruction needed to find and use the information	Instruction on new technologies and on technologies that have been upgraded or changed	Self-service, remote access to a wide variety of resources
Personal services	More remote access	Online mediation environment
Immediate responses	More global users	Even more global users
Multi-media resources	Multi-media resources	Equipment for people who don't have equipment
Online access to information	More online resources – less print	OCLC will have taken over everything – all reference services will be centralized
Beginning to coordinate access to county/local information	More coordinated access to county/local information	Access to remote databases will be through local libraries

Describe the second tier reference support you will need to support the services your library will provide to meet the information needs of your clients.

2007	2010	2015
Reduced need for people to answer questions		Support from local 2 nd tier reference service to provide access to unique local resources -- OR -- Local resources will be digitized
Some need for people to answer questions will remain to support small libraries with limited staff		
More staff training on technology and using electronic information resources; training on where staff should go when they need help	Still need staff training	Still need staff training
Will still need a personal connection	Will still need a personal connection	Will still need a personal connection
All public libraries should have subsidized access to the same databases with an easy, comprehensive search interface	All public libraries should have subsidized access to the same databases with an easy, comprehensive search interface	All public libraries should have subsidized access to the same databases with an easy, comprehensive search interface
These databases should be available to users remotely through libraries	These databases should be available to users remotely through libraries	These databases should be available to users remotely through libraries

What is more important – access to fee-based databases or a person to provide expert backup?

- Cooperative databases = 10
- People = 1
- Undecided = 2

What other information do you think is important to consider when evaluating second tier reference services?

- “Ask Now” will have to improve significantly if they are going to be effective in meeting end-user needs but that seems to be the direction the state is moving
- Make decisions that provide for the good of all patrons in California
- Make sure that we are providing equal services to English and non-English-speakers – Maybe equality is not possible but we should be working toward that.
- The State Library should provide support to help libraries provide multi-lingual services
- The statewide online catalog should be multi-lingual
- We also need to remain aware of providing devices for people with disabilities
- Staff training is going to be critical

REFERENCE SERVICES CURRENT TRENDS AND FUTURE NEEDS

Sacramento Focus Group – 7/26/05

Describe the clients who will use the reference services provided by your local library.

2007	2010	2015
Students	Students – either fewer overall OR more remote users	Totally global
Seniors	Many more seniors	Totally remote
Limited English-speaking	More multi-lingual users	Totally electronic
People with low access to technology (often low-income)	More indigent users – people with low access to technology	Still serve people with low access to technology
Mobile people/tourists	More remote users/more global users	Lonely people who want face-to-face interactions
People with disabilities	Preschoolers	People who create their own content/self-publishers
Young children	Sophisticated users	
Parents		
Small business owners		
Homeless		
Local clubs and organizations		

Describe the information needs your clients will have.

2007	2010	2015
Homework help	Fast	Virtual
Access to electronic databases	Digital	Instantaneous
Access to print resources	Accurate	24/7 real time
Instruction for the public – on using the equipment and on using the resources	Concise – Abridged	Customized
Health	Personalized – Customized	
Need to know what services are available	Disaggregated	Telepathic
Retirement planning	Paper products (2 people thought this)	Stable, safe information resources
Local history/genealogy	Free	
Business information	Multiple formats – “What I want”	Re-aggregation to provide context
Job seekers	More visual resources	
How-to/self-help		
Archival information		
Government information		

Describe the services your library will provide to meet the information needs of your clients.

2007	2010	2015
Access to more electronic resources	24/7 service	Access to international materials
In-person reference services	Downloadable information	Rent-a-librarian
More independent use of library resources – both remotely and in-library	More decentralized	Preprogrammed PDAs with specialized data/subject info
More use of the collections	Need young tech-savvy staff	Librarian will provide mediation and instruction/be a navigator
Triage	Nomadic service	Remote
IM Reference	Fewer reference librarians	Pushed to user, not pulled by user
Grab-and-go/drive-thru	Reference librarians will work from anywhere	
Deskless	More multi-lingual services	
	Electronic face-to-face interactions	

Describe the second tier reference support you will need to support the services your library will provide to meet the information needs of your clients.

2007	2010	2015
Less use	ILL	Centralized nationally or internationally, not at the state level
Answer fewer questions	Continue to answer really hard questions	Seamless interface for client
Provide more information about trends	Subject specialists	
Provide training – particularly online tutorials for the staff and the public	Provide training	
Move from system-level services to centralized services (1/3 now)	Move from system-level services to centralized services (2/3 now)	
Certification courses for first-level librarians (7)	More sharing	
Promote more sharing	More global use	
Evaluate new technologies and make recommendations to local libraries	Moving toward seamless interface for the client	
Access to archived and non-digitized information	Coordinate the group purchasing of databases	

What is more important – access to fee-based databases or a person to provide expert backup?

- Cooperative databases = 38
- People = 2

Several participants noted that this was a difficult decision, both intellectually and emotionally.

What other information do you think is important to consider when evaluating second tier reference services?

- 24/7 needs to be improved (particularly the software); if it was better it could become the second-tier reference provider
- Readers' Advisory services will become a more important role for reference staff
- We need to develop our own communication networks so that we create our own safety nets
- We need more subsidized training from the state; Info-People charges and many of us can't afford it

SUMMARY OF THE BALIS REPORT BY GAIL MCPARTLAND: THE ROLE OF REFERENCE AND SECOND-LEVEL REFERENCE IN SELECTED CLSA SYSTEMS IN CALIFORNIA

Gail McPartland facilitated focus groups in BALIS, NBCLS, PLS, SVLS in October and November 2004. Each focus group followed a similar agenda:

- Introductions
- Future of Reference Services – Steve Coffman
- What is the role of reference in the future?
- SWOT of current reference services
- Needs shared by all libraries if the library of the future is to be achieved
- What needs, roles or services can 2nd level reference address that would help libraries achieve their vision?

Four overall themes emerged from the focus groups:

- Domination of Google, the Web and Computers as Key Information Resources.
- Declining Budgets
- Changing Role of the Library in Society
- Emerging Library Professional

The participants listed a wide variety of services that might be provided by second level reference services:

- Training was the major need vocalized from all groups.

Other topics identified included:

- Development of pathfinders, FAQs, and websites
- More marketing of services
- More outreach to community stakeholders
- Coordinated collection development
- Question-answering that is library-to-library rather than library-to-system

Immediate Recommendations

1. Review processes and procedures for current question answering between patrons, local reference librarians and second-level reference staff. Seek specific and tangible means of streamlining this services and turning answers around faster.
2. Transition second level business practices, program and services to meet emerging needs in information literacy, marketing, and training.
3. Coordinate programs and services to address the changing culture of the library profession.
4. Meet with the stakeholders, in the California State Library, Infopeople, Librarians Index to the Internet, Califa, and other cooperative systems to review and discuss current trends and needs and begin planning for long-term needs.

Long-Term Recommendations

1. Convene a study group to review CLSA program and services – past, present and future – to best meet the needs of all Californians.
2. Update the CLSA legislation to reflect emerging library and information trends in California communities, which may or may include a component for reference and second level reference.
3. Explore statewide partnerships with the Department of Education, community colleges, technology industry and others to create programs and services to meet information needs most effectively and efficiently.

Appendix A - Reference Needs and the Role of Second Level Reference

	BALIS	NBCLS	PLS	SVLS
REFERENCE; QUESTION ANSWERING SERVICES				
Quick turn-around of 2 nd level questions		X	X	
Easier submission and follow-up of 2 nd level questions	X	X		
Direct patron referral, 2 nd level questions	X		X	
In-depth research			X	
Knowledge management, 2 nd level reference database of answers available online		X		X
TRAINING SERVICES				
Overall Staff Training	X	X	X	X
Training on local (my library's) databases, electronic resources, and collections	X		X	X
Tutorial development for patrons	X		X	
Tutorial development for staff			X	
Reference Services Coordinated for Libraries				
Coordinate Virtual Reference			X	
TBR for questions answered in virtual reference			X	
TBR for in-depth questions answered for other jurisdictions			X	
Funding support for specialized collections, e.g. business reference			X	
Regional distributed research collections, e.g. art history (cooperative collection development)	X		X	
Clearinghouse, information gathering and distribution of new services, technologies, best practices	X	X		
END-PRODUCTS AND SERVICES PRODUCED FOR LIBRARIES				
FAQ's, Pathfinders, and Websites on universal topics, e.g. CA Missions, writers, readers advisory, business	X	X	X	X
Marketing of libraries	X	X		X
Program and Workshop coordination	X			
Tools and Toolkits	X			
Project Management; Facilitation	X			
Conspectus services for local collections	X			
OTHER				
DATABASE TRIALS AND NEGOTIATIONS				X
Outreach, especially to educators, information delivery leaders (Google), and business community		X		X
Support for regional collaboration such as committees, projects and issues	X	X		
Digitize Collections		X		

SUMMARY OF THE MOBAC REPORT BY STEVE COFFMAN: *FUTURE OF REFERENCE FOCUS GROUP*

Steve Coffman facilitated a focus group discussion for libraries in the Monterey Bay Area Cooperative Library System (MOBAC) on July 19, 2005.

Participants from each library described current conditions in their libraries in three or more of the following areas:

- Issues
- Reference services for adults
- Reference services for children
- Questions
- Patrons
- Desk, staffing and physical arrangements
- Outreach, education, marketing

There was general agreement that the number of reference questions being asked is lower than it was. Reference librarians are spending more time helping patrons to use electronic resources to find answers to their questions – a teaching function. As one person said, the patrons are becoming more self-sufficient.

Second Level Reference

There was general consensus about the following conclusions:

- Second level reference is not working; 21st century expectations are superimposed on a 1960s model for document delivery, funding, and structure.
- MOBAC libraries are not getting their money's worth from the System Reference Center.
- The "answering difficult questions" function of the System Reference Center is not needed nearly as much now.

The most commonly mentioned new roles for the System Reference Center were:

- Building and maintaining reference tools (like LII, Jobstar, indexes to local newspapers, lists of special collections, etc.)
- Training, particularly in the Monterey area
- Collective purchasing of databases and other tools
- Marketing; doing something to raise the profiles of libraries and library reference
- Marry PLS and Califa and use it as a model for system services