

**AGENDA ITEM:** Library of California Reference Program**GENERAL OVERALL PROGRAM UPDATES:****BACKGROUND:**

The Library of California Act supports Resource Sharing in the broadest sense through various programs, one of which specifically addresses Information and Referral Services, which is often most generically called *Reference Services*. The Act states the intent to provide all Californians the opportunity to obtain from their local library all their needed materials and **information services** by facilitating access to the resources of all libraries in the state through the local library. (Sec. 18801) The Act further recognizes that effective sharing of services, expertise, and materials to benefit all Californians and to make fullest use of all resources available requires a structure and an ongoing commitment by the state to compensate participating libraries. (Sec. 18801)

Services and resources of local libraries are extended and augmented through access to Regional Library Network services. Regional Library Networks SHALL support answering requests outside the capacity of the local library by (1) accessing the resources and expertise of other libraries, (2) improving general reference service in local libraries, and (3) improving reference service to respond to specific needs of underserved populations. (Sec. 18846) Statewide Services SHALL extend the effect of services provided locally and by the Regional Library Networks by facilitating access to online resources locally produced and/or commercially produced and by facilitating access to special information expertise and resources, in physical or electronic means. (Sec. 18851 and Sec. 18853) Regulations further specify some possible methods by which to deliver services and resources to all Californians regardless of any limitation that may be imposed by the location and/or resources of the local, primary library. (Sections 20323, 20326, 20329, 20330, 20331, etc.)

The CLSA State Reference Centers program, which has supported primarily public libraries has never been funded by the state. That program and services are described in Education Code Sections 18760-18764, and the similar (though not identical) LoC services are described in Education Code Section 18853(a). Funding for LoC Statewide Services relating to the reference program is authorized by the Act. (Sec. 18853, 18855, 18856, 18859) To date the Board has not set a policy direction for statewide reference services pending development of definitions, program direction, and potential costs.

Planning for effective models through which Statewide Services may empower the library community to empower the library users identifies some compelling directions for further exploration and development. Also, a suggested, recommended definition of those processes and environment that comprise *Reference Services* emerged. It is clear that for librarians to be empowered and to extend this empowerment to the library user, five service streams are highly valued as well as logical for state support:

- (1) Commercial electronic database discounts and/or provision (for example further development of AMIGOS services);
- (2) Virtual reference desk service accessible through local library and/or regional library network web sites and available 24/7 (for example, further development of 24/7 Reference and Q&Acafe services);

- (3) Facilitated access to non-electronic materials from a large, rich library collection (for example, services provided by the First Source project);
- (4) Resources and collections developed cooperatively and pro-actively; and
- (5) Enriched and empowered Regional Library Network operations to facilitate coordinated and collaborative activities within, among, and for all regions.

Statewide support of the essential reference environment and acknowledging support of local librarians in their rapidly developing role as facilitators for library users are overarching themes.

CURRENT STATUS: In accordance with Board direction, the 2001/2002 budget request for Library of California funding did not include any element specifically for the statewide reference components of the Act, pending staff and Board work on further defining those components. At the August 2000 Board meeting, staff proposed that a formal review of the statewide reference components be undertaken to provide the Board with recommendations for the future, overall design of a reference program.

The review of the reference scene statewide began with the hiring of the Network Resources Consultant in May 2001. The Network Resources Consultant has been meeting with CLSA System Reference Center Coordinators and other reference-interested librarians, visiting the Reference Centers and other libraries. San Joaquin Valley Information Center and San Joaquin Valley Library System were visited in March. In April, 2002, the Network Resources Consultant participated in the Tierra del Sol Regional Library Network Reference Forum. With these two visits, Reference Centers in all parts of the state have been contacted.

Reference Center Coordinators and several System administrators met in Sacramento on October 2, 2001 to begin a group dialog on reference program issues. These meetings have afforded the opportunity to identify common concerns and to communicate them to both regional contacts and the LoC team. A meeting planned for January 2002 became impossible due to budget restrictions, and it is intended to be rescheduled later this year. Communication has continued via telephone meetings and email. The email discussion group for *Reference* issues, LoCA\_Ref, is not yet functioning effectively due to technical difficulties. We continue to expect that through the medium of the email discussion list testing and assessment of assumptions and possible models will occur. The group will continue to consider the changes brought to the reference process by the explosion of internet-related capabilities and access, roles and responsibilities of the several service providers—regional library networks, statewide programs, etc.

## ELECTRONIC DATABASES

Efforts to develop a program for database cooperative licensing have been underway with the AMIGOS organization. Details of these efforts are reported in the Statewide

Information Databases report. Reference Librarians in the field are consistent in their unanimous desire for assistance with obtaining electronic resources

In addition to the efforts of staff and field to identify roles and service elements that may ultimately comprise the Library of California reference program, several trial projects have been ongoing on a statewide services level, supported to date with LSTA funds. Following is an update on these *reference* pilot programs.

### FIRST SOURCE

An LSTA grant for 2001/2002 has been awarded to continue testing and assessment of this probable statewide reference services component through the Los Angeles Public Library (LAPL). This year's grant provides CLSA system reference centers with access to a substantial number of electronic resources, delivery of print materials, and prompt technical support. LAPL has completed an informal evaluation of the effectiveness of the FirstSource service, and that data will be used in developing recommendations to the Board regarding the LoC Reference Program.

A change in the First Source program is anticipated for the 2002/2003 LSTA grant cycle. The proposed change is to incorporate the elements of First Source (primarily electronic resources, access to the LAPL web catalog, and facilitated delivery of print materials) into the 24/7 Reference, Phase 5 grant program. A number of benefits will result, including oversight of both print and electronic resources deployment in reference service.

### 24/7 REFERENCE

This virtual reference desk program has been developing in trial mode with LSTA funding since 1998 and is a leader in the exploding field of virtual online interactive reference services. The 24/7 Reference operation is based in the Metropolitan Cooperative Library System Reference Center located in the Los Angeles Public Library. 24/7 Reference uses web-based software to allow a library user to connect through his/her local library web site to a live librarian who is prepared to answer questions, to refer to other sources, and to respond to any of the interactions that may occur in a face-to-face (F2F) or telephone reference transaction. And! The library user can enjoy the advantage of this information service at any time the need is there—24 hours a day. In the current year, 24/7 Reference provides the service to the Arroyo Seco Regional Library Network members, as a function of the grant. Service to the Tierra del Sol Regional Library Network and to the Gold Coast Regional Library Network. Library of California Board members through contractual arrangements, and any others interested from the library community are encouraged to take a look at the 24/7 Reference service, ask a question and experience the possibilities. Online, live reference does not replace face-to-face reference services; online, live reference *does* provide a reasonable, efficient, appreciated additional avenue to enter the library to gain assistance from the reference librarian.

### ETHNIC CYBRARY

The Virtual Ethnic Resource Center, a test project funded through LSTA and discontinued in Fall 2001, demonstrated two major points: (1) that the VERC web site did not effectively reach or serve the intended target audience, and (2) that the general topic of ethnic-interest information in a web-based environment is of interest to librarians and general library users. Staff has explored development of a web-based ethnic interest resource with Librarians' Index to the Internet (lii.org), an extremely successful and highly respected Library of California program. lii.org has submitted an LSTA proposal for the 2002/2003 year that develops this concept within the framework of the resources and service provided by lii.org. Further developments will be reported to the Board.

**RELATED ISSUES TO COME BEFORE THE BOARD IN THE FUTURE:**

1. Discuss and consider the drafted definition of *reference* process and environment that may inform statewide services related to Information and Referral Services.
2. Consider report of recommendations regarding further development and implementations of the specific activities that may comprise statewide *reference services* under the Library of California Act.
3. Review results of studies and projects now underway.
4. Consider policy of reference service within the context of statewide, regional, and local services matrix.

Relevant Committee: Access Services  
Staff Liaison: Cathie Helmick