

# Statewide Supplemental Reference Service

## New Jersey's Model for Backup Reference

Peter Bromberg

The Camden County (N.J.) Library transitioned itself from a regional reference center to New Jersey's Statewide Supplemental Reference Service in three short months. This article discusses the history of backup reference service in the state of New Jersey, describes the current statewide service, and considers future service possibilities in light of current trends.

In late 1999, the New Jersey State Library issued a Request for Proposals (RFP) for a centralized, statewide, supplemental reference service that would provide backup, general reference support to librarians throughout New Jersey. This was a major shift away from the regional reference support model that New Jersey had been using for almost fifteen years. In the regional model, four or five libraries throughout the state provided backup reference through a toll-free number to libraries in their region. Each reference center was separately funded by one of the four regional library cooperatives, created in 1986 to improve access to information for the people of New Jersey by facilitating cooperative services for and among New Jersey libraries. The role of the backup reference center was solely that of a question-answering service. If a librarian could not answer a reference question with local resources, the librarian would call the regional reference center, and the center, with its larger staff and more extensive collection, would take responsibility for finding an answer. The reference center did not take calls directly from patrons, only from libraries, although the center would make direct contact with patrons when it was appropriate to do a more detailed reference interview. In addition, the state funded, and continues to fund, specialized reference services that focus on art, business, legal, health, and other specialized topics. These specialized reference services are provided by a number of public and academic libraries that maintain strong subject collections. They also serve as backup reference services, offering reference help to librarians throughout the state.

The regional reference model had been working quite well when, in late 1994, the Web came on the scene. Small and mid-size libraries began hooking up to the Internet and found that the size of their collections had suddenly expanded beyond their

wildest dreams. New Jersey's regional library cooperatives proactively offered Internet searching classes, and in a very short time, the landscape of reference service was permanently changed. As librarians grew adept at mining the Internet's endless supply of information, they began to answer more of their patrons' questions directly and consequently had less need for backup reference service. Libraries were also providing Internet classes to their patrons, and they soon found that patrons, now able to find their own information on the Net, were asking fewer and fewer reference questions. The numbers speak for themselves. In 1995, the Camden County Library, acting as the South Jersey Regional Reference Center, answered 5,942 regional library questions. That dropped to 5,877 questions in 1996; 4,678 questions in 1997; 3,592 questions in 1998; 2,990 questions in 1999; and 2,240 questions in 2000. However, although most libraries' need for question-answering support had lessened, their need for training, and their desire for full-text database access, had greatly increased.

In light of these events, the State Library decided to withdraw funding for the four regional reference centers and instead offer one library in the state an annual contract worth \$200,000 a year to provide backup reference service to all libraries in New Jersey. This new model reduced overhead and allowed surplus funds to be reallocated to training and cooperative database purchasing. The RFP also included a one-time startup fund of \$30,000 to offset the cost of new furniture and equipment.

### The Proposal

In December 1999, when the state issued the RFP, the Camden County Library (CCL) was the Regional Reference Center for the South Jersey Regional Library Cooperative, providing backup reference service to 550 libraries in South Jersey. Our reference department consisted of nine full-time and four part-time librarians. Our reference collection had almost 12,000 reference titles and more than 22,000 volumes. In addition to our Regional Reference Center duties, we directly served more than 250,000 residents throughout the county. CCL

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had already responded to the shifting reference landscape and altered our backup reference role by providing not only telephone reference backup to our South Jersey colleagues, but also e-mail reference, Internet training, and subject-based Web guides. In addition, we hosted "Days at the Center" when we invited librarians to spend a day with us to learn more about our resources and reference methods. The fact that CCL had demonstrated a responsiveness to the changing needs of its service population and had an experienced staff and a solid reference collection made us a top contender for the state contract, but was this really a challenge that we wanted to take on?

The timing of the RFP was bad for us. It was issued in late December 1999, just before the holidays, and the proposal was due by February 1, 2000. As head of the reference department, it fell to me to draft the proposal and I was about to leave on a three-week vacation! If we decided to go for it, that would leave only two weeks to draft the proposal upon my return, while dealing with three weeks of catch-up work at the same time. But the reference staff felt strongly that they were up to the challenge. As a regional reference center, we had always provided a high level of customer service, and the staff wanted the opportunity to provide the same service to their colleagues across the state. We were also aware that we would be losing our funding as a regional reference center, and if we did not get the statewide reference contract, we would be faced with possible personnel cuts, which we certainly wanted to avoid. For these reasons, and with the director's approval, we decided to throw our hat in the ring.

The RFP was quite in-depth, requiring detailed information on staff competencies, depth of collection, funding, database access, and more. Knowing the time constraints, the reference staff stepped forward to help, with each librarian taking on one or more pieces of the puzzle. When I returned from vacation in mid-January, I collected all of the work the staff had done, and began adding content and weaving it all together into a proper proposal. Developing an appropriate desk schedule was one of the more challenging pieces of the puzzle. The grant offered \$200,000 to cover all costs of the service. After accounting for all fixed operating costs, including telecommunications, reference materials, office supplies, and

database fees, I estimated that the budget would cover four additional FTE senior librarians and one half-time senior library assistant. Knowing how many "person hours" I had to work with, I then had to see if a realistic desk schedule was possible based on the demand for service.

To estimate the demand for service, I collected the most recent statistics of the other regional reference centers and looked at our own statistics to determine peak hours of usage. Based on the overall numbers and patterns of use, and making sure not to use more hours than the contract would cover, I developed a desk schedule that had either one, two, or three librarians dedicated to statewide reference at different times during the day. It was decided that all librarians would work both the statewide reference desk and our own public service desk, averaging two hours per day on each. The regional centers had tried using the "separate staff" model, which in effect created a separate staff that worked exclusively on regional questions, while the rest of the staff offered local services. Although this model made it easier to track separate personnel budget lines, it ultimately failed because the "regional" librarians did not feel connected to the rest of the staff, and there were thorny problems of desk coverage during vacations and sick times. For those reasons, we opted for a combined schedule that allowed all staff to work at both public and statewide service points (see figure 1).

On February 1, copies of the proposal were hand-delivered to the South Jersey Regional Library Cooperative. The RFP indicated that the contract would be awarded on March 1, and the contracting library would be required to provide service beginning on July 1. Now there was nothing left to do but wait.

## Planning and Implementation

Although the contract was supposed to be awarded by March 1, we weren't notified that we had gotten it until the third week of March. I went from feeling

Worksheet Used to Figure out Sample Schedule for Statewide Reference Desk

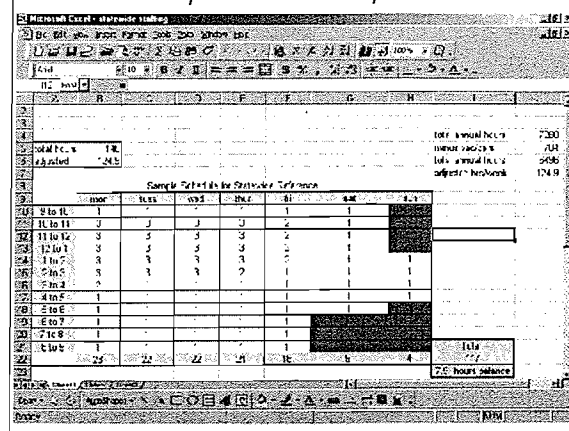


FIGURE 1

excited to wondering how we were going to get the service up and running in three months. The contract required us to build and furnish a separate office; purchase equipment, including a fax machine, computers, a scanner, and a copier; build a Web page; install phone lines; purchase new databases; add sources to our print collection; develop documentation, schedules, policies, and procedures; and hire and train four new staff members (three professional, one support). Each task carried its own unique challenges.

The first order of business was to meet with the program managers from the other regional reference centers to solicit their feedback and plan for transition. That meeting was very fruitful. It was decided that each region would continue to maintain its toll-free reference numbers for a few months; that number would either ring into the statewide reference toll-free number or provide a recorded message directing librarians to the new number. In addition to the wonderful information that was exchanged regarding items to add to our reference collection, the collegiality and support that was demonstrated by the other regional reference program managers was invaluable and helped to assure me that there was broad commitment to making this service the best it could be.

The two biggest challenges to getting the service up and running on time were the building/furnishing of the new office and the installation of the new phone lines. The installation of the phone lines was difficult because I was unable to get in contact with anyone from our in-house telephone vendor, Executone. With a limited amount of

time to complete the setup, I decided to do an end run around Executone and have Bell Atlantic install three new phone lines that would have no connection to our current in-house telephone system. This meant that we would not be able to transfer statewide reference calls to other library phones, and we would not be able to take advantage of our in-house voice-mail system. Neither of these factors proved to be a problem, however, as we didn't have a need to transfer state reference calls, and Bell Atlantic was able to provide us with its own voice-mail service.

Other difficulties arose because we did not have a single provider for our local, toll-free, and long-distance services. AT&T was our long distance and toll-free provider, while Bell Atlantic provided the lines and voice-mail. I received conflicting information from the two companies and found it difficult to make contact with customer service representatives, often getting stuck in voice menu loops. Trying to get phone service through Bell and AT&T required a great deal of time and daily contact with both companies. It was enough to make me appreciate the benefit of a good old-fashioned monopoly! The important thing, of course, is that the toll-free line was up and running on July 1, which it was.

The second biggest challenge was getting the office built and furnished. I am lucky to have a librarian with a Bachelor in Fine Arts degree on staff, and she was able to take on the challenge of designing the office space and selecting the furniture. It was decided that we would expand the area behind our public service reference desk and make that expanded area our statewide reference office. This decision required that a wall be moved, shelves be taken down and replaced, and carpeting be patched. The library's maintenance staff did a wonderful job preparing the space for our new office. Unfortunately, there were a number of problems with the purchase and installation of the furniture. One of the problems was that the desks we had ordered for our new staff members were not included in the final order. Then, when the furniture and panels arrived, there were some installation problems due to vendor mismeasurement of our office area that resulted in walls being installed out of place. The placement of the walls required the movement of our power poles—an unexpected delay—and there

was concern that the office would not be functional by our July 1 deadline. However, the needed adjustments were made, and the office was finished on time.

The purchase of computer equipment went very smoothly with the help of the library's IT department. Our business office staff also helped us expedite all purchases including database contracts, a new copy machine, and new reference materials. One of the easiest, though certainly not unimportant, tasks was the hiring of three new reference librarians and one support staff member. Serendipitously, the Camden County Library was having its first-ever open-house recruitment drive in mid-April. Our human resources director had done an outstanding job of putting together the open house, and the response to it was phenomenal. When it was time to interview and hire new reference librarians, we had a pool of talented, motivated people to choose from. We were able to hire three new librarians, two of whom were able to begin work a few weeks before July 1. This allowed them some needed time for training and orientation. We filled the support staff position with an internal candidate who we knew would do a great job. Thus the staffing issues were ultimately the least difficult part of the whole process.

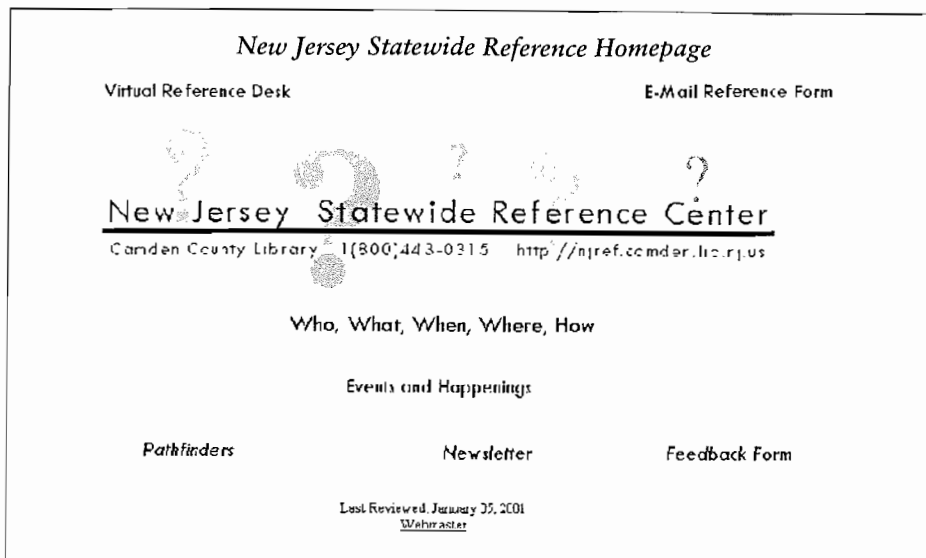
A Web page (<http://njref.camden.lib.nj.us>) that contained contact information, a virtual reference database loosely modeled on *Librarians' Index to the Internet* ([www.lii.org](http://www.lii.org)), an e-mail reference form, a feedback form, and subject pathfinders was created with the input of many staff members (see figures 2 and 3). Teams were formed to develop and recommend procedures and design questions sheets. The IT department again lent a hand in setting up a database to track statistics using Inmagic's "DBTextworks" software ([www.inmagic.com](http://www.inmagic.com)), which is user-friendly and easy to configure (see figure 4). Using DBTextworks we are able to generate monthly reports that detail the number of questions answered, broken down by region and library type (i.e., public, academic, school), with additional breakdowns on turnaround time (see figure 5). Everyone on staff worked diligently to prepare for opening day. It was the most collaborative project that I have ever been a part of. Although it was very stressful at times, it was also an immensely fulfilling experience. After all of our hard work, July 1 arrived and we were ready to go.

Our first live day of service turned out to be humorously anticlimactic. As it happened, July 1 fell on a Saturday, and Saturdays in the summer are not known for generating a high volume of reference questions. We did not receive one call on our first day of service. However, on the following Monday the phones started to ring, the e-mails started arriving, and the staff breathed a collective sigh of relief. We were in business.

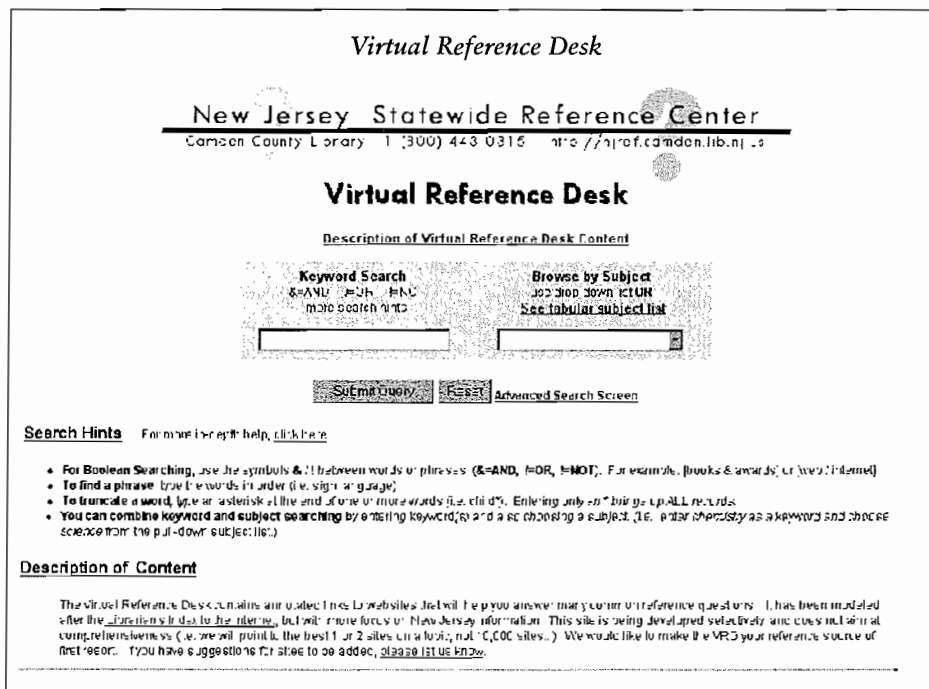
## The Service

The core of the New Jersey Library Network Supplemental Reference Service is backup reference support for libraries in New Jersey. If a library cannot find the answer to a patron's question or requires coaching on what sources to use, the librarian contacts us for help. We provide a toll-free number that feeds into three lines, with voice-mail as a backup in case all lines are busy. We also offer an e-mail reference form that some librarians prefer to use. We do not take questions directly from patrons, and we ask that our toll-free number and Web site address not be given out to patrons. It is much more efficient for patrons to contact their local library first, since their information needs can usually be met at the local level.

All of the calls and e-mails are fielded in our statewide reference office, which is staffed by one, two, or three librarians, depending on the time of day. The office has three computer stations with T1 Internet connections, and each station has a cordless phone that rings off the toll-free line. When e-mails arrive, a message is displayed on all PCs simultaneously, which allows for instant retrieval. This was accomplished by having all three computers share the same e-mail account on our Microsoft Exchange server. Whoever reads the mail first, prints it out, attaches it to a questions sheet, and deletes it. The office also contains a dedicated fax machine, a scanner with Ariel software, and a dedicated copy machine. Questions that are in progress or "open questions" are centrally located in the office along with questions that are currently referred out and questions for which calls need to be made. The office is always staffed by at least one librarian, but there are usually two and often three librarians working on statewide questions at any given time. Our reference staff consists of twelve



**FIGURE 2**



**FIGURE 3**

full-time and three part-time librarians. A typical schedule includes two hours on the statewide reference desk, two hours on the public reference desk, and three hours of off-desk time for other duties.

The CCL Web page supports the statewide reference service by offering a continuously evolving “Virtual Reference Desk,” a growing set of topical pathfinders, a quarterly newsletter, a feedback form, links to information on professional events, links to our catalog and periodical holdings, and a list of subscription databases that are available to be searched by our staff. The newslet-

ter appears on our QWeb site and is also distributed in paper to all libraries in New Jersey with the help of the regional library cooperatives, who allow us to piggy-back when they distribute their newsletters.

The Virtual Reference Desk, available from our home page, is an annotated collection of highly useful Web resources that assist New Jersey librarians with common and “Jerseyana” reference questions—sort of a *Librarian’s Index for the Internet* (www.lii.org) with more of a New Jersey focus. Although the Virtual Reference Desk was designed

to be used by the librarians we serve rather than their patrons, we also created a mirror site that is available to patrons, after receiving a number of requests from libraries that wanted to feature the Virtual Reference Desk on their Web sites. We encourage libraries to share the Virtual Reference Desk with their patrons by using the mirror site URL, [www.camden.lib.nj.us/dbtw-wpd/public.htm](http://www.camden.lib.nj.us/dbtw-wpd/public.htm) (see figures 2 and 6).

Although not required by our contract, we have also spent a good deal of time promoting our services. We have a strong commitment to marketing our statewide services to ensure that all New Jersey libraries are aware of what we have to offer. Soon after opening, we began offering a “Day at the Center,” inviting groups of librarians from around the state to visit us for a day (or half-day) and see us in action. We also hosted a visit from the Reference Section of the New Jersey Library Association. In addition to entertaining on-site, we also hit the road, doing presentations around the state at regional library cooperative meetings and professional conferences, discussing our service and distributing promotional materials. One popular item was a small sticker listing our toll-free number and Web site address. These stickers, suitable for sticking on the back of a phone or on a PC monitor, were distributed to all libraries with the help of the regional library cooperatives. I joined all of the regional electronic discussion lists and actively promoted new sites that were added to our Virtual Reference Desk. This generated a lot of positive comments from the libraries that we serve.

### Statistics: The First Six Months

Between July 1 and December 31, 2000, we received 2,757 questions from libraries across the state. Sixty-one percent of all questions were answered within six hours. Over 77 percent were answered in under twenty-four hours, and 88 percent were answered within forty-eight hours. Approximately 7 percent of the questions were sent by e-mail. More than 8,000 pages of photocopies were faxed. While we received one-third fewer questions than we had estimated (based on the total number of regional questions in 1998, and adjusting for the downward trend), we were still extremely busy. Although the downward

Screen Shot of Record Edit Form for Our DBTextworks Statistics Database

FIGURE 4

Screen Shot of Report Generated from Our DBTextworks Statistics Database

NEW JERSEY SUPPLEMENTAL REFERENCE SERVICE	
Camden County Library	
July 01 - December 31, 2000	
Public 277	Academic 24
School 693	Other 24
Institutional 204	
Special 662	
<b>Total All Types: 2207</b>	
	<b>Total Turn-Around Time:</b>
	0-6: 216
	7-24: 216
	25-48: 216
	49-72: 216
	73+ : 216
	<b>Total Turn-Around Time: 1080</b>
	<b>Total Turn-Around Time: 1080</b>

FIGURE 5

Virtual Reference Desk Result Screen from a Search on "Used Books"

New Jersey Statewide Reference Center  
Camden County Library | (800) 443-2810 | http://njsrjc.com/rd/njsrjc

**Virtual Reference Desk**

Your search found 1 record(s) -- Click Here for New Search --

**Specific Resources**

Addit: If you need one of these books search for the book title in the library catalog. You will find the book's location, call number, and price. You can also search for the book's title in the library catalog. You will find the book's location, call number, and price. You can also search for the book's title in the library catalog. You will find the book's location, call number, and price.

Subject(s)  
Books / Readers / Adult

[Perform A New Search](#)

FIGURE 6

trend in reference questions continues at most libraries, the questions that patrons do ask are often sophisticated and multilayered, requiring a high level of reference work. In other words, though we may receive 3,000 fewer questions, the relatively easy questions are no longer coming our way. The difficult questions—the ones that consume the majority of our time and resources—have remained fairly steady.

## The Future

I believe that there will always be a need for backup reference services, although as questions continue to decline, it is possible that our service will either reduce in size or transition to providing services beyond question-answering. These services may include training, creating and maintaining Web pathfinders and Virtual Reference Desks, and even offering collection development and staffing consultations. New Jersey librarians continue to take advantage of the many inexpensive Internet courses offered by the regional library cooperatives. As they improve their reference skills and gain greater access to full-text databases through cooperative purchasing plans, their need for backup reference will continue to decline. The Internet is not the only technological advance that reduces the need for backup reference service. There are a growing number of national virtual reference projects that may ultimately prove to have a large impact on how refer-

ence services are provided. Our reference staff is currently taking part in a pilot project to provide real-time reference service to regional patrons through a chat interface using LSSI's "Egain" software ([www.lssi.com/virtual/](http://www.lssi.com/virtual/)). Many librarians have a vision of cooperative real-time reference service that will be able to provide 24/7 reference service directly to patrons. While there are many issues to be worked out, it is quite possible that 24/7 reference service will become a reality in New Jersey, which would further reduce the need for backup reference service. We at the Camden County Library are ready to change with the times, and there has already been talk of acting as backup reference support to the libraries in our pilot project that will be providing real-time reference directly to patrons. Whatever the future holds, it is important for us to pay close attention to the needs of our patrons, the patterns of use, and the trends, and to be willing to respond by adapting the ways in which we provide service.

Regardless of what changes may come, the New Jersey State Library has taken a positive step in beginning to reallocate resources in response to the changing needs of libraries. The consolidation of multiple regional reference services into a single service point has freed up money for other services, such as free full-text access to EbscoHost for all libraries in the state. The transition from regional reference backup to statewide reference backup occurred smoothly, with no interruption of service, thanks to the cooperation and help of the regional reference program managers. Librarians throughout the state continue to have toll-free and e-mail access to immediate reference help. Of course, this means that libraries can provide better reference service to their patrons, who are the ultimate beneficiaries of our statewide reference services. ■

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