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From Bricks and Mortar to Bits and Bytes: Examining the Changing State of Reference Services at the University of Toronto Libraries During COVID-19

De l'espace physique à l'espace numérique : examen de l'évolution des services de références des bibliothèques de l'Université de Toronto

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Résumé de l'article

Avant la pandémie, l'Université de Toronto constituait une expérience en personne. La fermeture des bibliothèques physiques et le passage à l'apprentissage à distance ont obligé les bibliothèques à s'adapter à de nouveaux modes de soutien à l'enseignement, à l'apprentissage et à la recherche. Une enquête a été menée sur la prestation des services de référence, les modèles de dotation en personnel, les ressources et les outils en demandant aux répondants de décrire les services de référence avant et pendant la pandémie. Les objectifs de cette enquête étaient de saisir l'état des services de référence dans les bibliothèques de l'Université de Toronto (UTL), et de comparer les données sur les pratiques de référence pendant les périodes pré-pandémique et pandémique dans le but d'identifier les défis et les opportunités pour l'avenir des services de référence à l'UTL. 70 % des bibliothèques interrogées utilisaient des comptoirs de référence pour les services de référence avant la pandémie, et, pendant la pandémie, 75 % des bibliothèques ont offert des rendez-vous de référence virtuels par vidéoconférence. Les résultats montrent que la dotation en personnel et les heures d'ouverture des services de référence dans la plupart des bibliothèques interrogées ont été réduites pendant la pandémie. De nombreux répondants ont indiqué que même s'ils offraient moins d'heures de service de référence, ils continuaient à fournir de l'aide en dehors des heures prévues. Les outils et les plateformes en ligne qui étaient déjà familiers aux bibliothécaires sont restés populaires, ce qui a permis aux fournisseurs de services de s'adapter rapidement à l'environnement virtuel et d'assurer une continuité de service. Si la transition rapide des services n'a pas été sans difficultés, elle a également offert plusieurs nouvelles possibilités de repenser les services de référence des bibliothèques de l'Université de Toronto.

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From Bricks and Mortar to Bits and Bytes: Examining the Changing State of Reference Services at the University of Toronto Libraries During COVID-19

De l'espace physique à l'espace numérique: Examen de l'évolution des services de références des bibliothèques de l'Université de Toronto

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Abstract / Résumé

Before the pandemic, the University of Toronto provided predominantly in-person experiences. The closure of physical libraries and shift to remote learning required library staff and users to adapt to new modes of supporting teaching, learning, and research. The authors conducted a survey about reference service delivery, staffing models, and resources and tools, which asked respondents to describe reference services at their libraries before and during the pandemic. The survey objectives were to capture the state of reference services at the University of Toronto Libraries (UTL) and to compare data about reference practices during the pre-pandemic and pandemic periods, with the goal of identifying challenges and opportunities for the future of reference services at UTL. Seventy percent of libraries surveyed used reference desks for reference services pre-pandemic, and during the pandemic, 75% of libraries used virtual reference appointments by video conferencing. The survey results show that reference service staffing and service hours in most surveyed libraries were reduced during the pandemic. Many respondents reported that while they offered fewer reference service hours during the pandemic, they continued to provide assistance outside of scheduled hours. Online tools and platforms that were already familiar to librarians remained popular during the pandemic, allowing service providers to adapt quickly to the virtual environment and ensure seamless service continuity. While the rapid transition in services at the University of Toronto was not without its challenges, it has also offered many new opportunities for re-envisioning reference services at UTL.

Avant la pandémie, l'Université de Toronto constituait une expérience en personne. La fermeture des bibliothèques physiques et le passage à l'apprentissage à distance ont obligé les bibliothèques à s'adapter à de nouveaux modes de soutien à l'enseignement, à l'apprentissage et à la recherche. Une enquête a été menée sur la prestation des services de référence, les modèles de dotation en personnel, les ressources et les outils en demandant aux répondants de décrire les services de référence avant et pendant la pandémie. Les objectifs de cette enquête étaient de saisir l'état des services de référence dans les bibliothèques de l'Université de Toronto (UTL), et de comparer les données sur les pratiques de référence pendant les périodes pré-pandémique et pandémique dans le but d'identifier les défis et les opportunités pour l'avenir des services de référence à l'UTL. 70 % des bibliothèques interrogées utilisaient des comptoirs de référence pour les services de référence avant la pandémie, et, pendant la pandémie, 75 % des bibliothèques ont offert des rendez-vous de référence virtuels par vidéoconférence. Les résultats montrent que la dotation en personnel et les heures d'ouverture des services de référence dans la plupart des bibliothèques interrogées ont été réduites pendant la pandémie. De nombreux répondants ont indiqué que même s'ils offraient moins d'heures de service de référence, ils continuaient à fournir de l'aide en dehors des heures prévues. Les outils et les plateformes en ligne qui étaient déjà familiers aux bibliothécaires sont restés populaires, ce qui a permis aux fournisseurs de services de s'adapter rapidement à l'environnement virtuel et d'assurer une continuité de service. Si la transition rapide des services n'a pas été sans difficultés, elle a également offert plusieurs nouvelles possibilités de repenser les services de référence des bibliothèques de l'Université de Toronto.

Keywords / Mots-clés

virtual reference, remote reference, reference services, pandemic, academic libraries, COVID-19

référence virtuelle, référence à distance, service de référence, pandémie, bibliothèques universitaires, COVID-19

Introduction

The pandemic has dramatically changed reference services at the University of Toronto Libraries (UTL). The brick-and-mortar libraries at UTL are the heart of the university. If UTL's extensive print collection is the university's pride, then the delivery of in-person reference service is the library's joy. Before the pandemic, the University of Toronto provided predominantly in-person experiences. Most classes took place on campus, and library staff interacted with students primarily within physical library spaces. In the pre-pandemic period, up to 18,000 people entered Robarts Library, the largest library in the UTL system, on an average day (Walsh & Rana, 2020). UTL offered virtual reference services through email and the Ask a Librarian chat service, but the libraries' primary focus was in-person reference support. On March 13, 2020, the University of Toronto announced that the majority of in-person classes would be delivered remotely to reduce the spread of COVID-19.

UTL comprises over 40 libraries across three campuses. The libraries range from large research libraries serving undergraduate students, graduate students, faculty, and international researchers to small libraries staffed by solo librarians who provide circulation, reference, instruction, and faculty liaison services. Virtual reference is not new to UTL, but the pandemic response required the types of virtual services offered to change and expand. For many years, UTL has provided virtual reference through the Ask a Librarian chat service, coordinated through Scholars Portal as part of the Ontario Council of University Libraries. In September 2020, the activity on the Ask a Librarian chat service increased 200% as compared to September 2019. The closure of physical libraries and shift to remote learning required library staff and users to adapt to new modes of supporting teaching, learning, and research.

UTL has a Reference Services Committee (RSC) that meets monthly to discuss reference services, share best practices, and connect with other service groups whose mandates overlap with reference services. In early 2020, an RSC working group was tasked with investigating the state of reference services at UTL, but when the pandemic struck, the group's mandate shifted to capturing the pandemic response in reference services. In order to better understand the transition to remote reference at the University of Toronto Libraries, the investigators conducted a survey of libraries across the University's three campuses. The survey objectives were to document the state of reference services at UTL before and during the pandemic and to compare data about reference practices during the pre-pandemic and pandemic periods, to identify challenges and opportunities for the future of reference services at UTL.

Literature Review

Academic libraries have been providing reference services both in-person and remotely for many years. Wharton and Mann (2020) noted that reference services in academic libraries are shifting from conventional reference desks to hubs designed to connect users to research and campus resources and facilitate mindful human interactions. In addition to providing service at reference desks, academic libraries have also explored roving reference, in which library staff can provide point-of-need service, helping users who may not know they can approach the reference desk (Coleman et al., 2016).

Maddox and Stanfield (2019) surveyed academic librarians to investigate technology used for virtual research consultations. Survey respondents described their experiences using tools such as Big Blue Button, Blackboard Collaborate, WebEx, and Zoom. One commenter stated: “Despite the promotion of virtual consultation services I find that the vast majority of students prefer face-to-face communication... I wish that more would sign up for my virtual consultations because I would probably reach more students” (Maddox & Stanfield, 2019, p. 258). Mawhinney (2020) described how in comparison to virtual reference, face-to-face interaction is the preferred service choice for many users. However, under public health guidelines during the pandemic, in-person service is not an option.

There is debate as to which virtual reference method is preferred by library users. Mawhinney’s (2020) exploratory study examining McGill Library users’ perspectives regarding virtual reference services suggests a preference for virtual reference services that are “personal, informal, and conversational” (p. 7). Students preferred chat services because they perceived virtual reference services via email to be too slow. However, when using email, students indicated a preference for contacting a personal email account, like that of a liaison librarian, over a generic email address (Mawhinney, 2020). Faculty also preferred contact with liaison librarians assigned to their subject area (Shoham & Klain-Gabbay, 2019, as cited in Mawhinney, 2020).

The debate over reference services staffing models has spanned several decades. As early as 1977, researchers have investigated whether professional librarians, rather than library assistants or other library staff, are needed to provide high-quality reference service at the reference desk (Wharton & Mann, 2020). This discussion now extends to reference services in the virtual environment. Wharton and Mann (2020) surveyed students to determine their perceptions of a virtual chat service staffed by both librarians and non-librarians. Their findings were that user satisfaction remained high, regardless of whether service was provided by professional library staff or trained graduate student assistants.

Chesley et al. (2020) noted that distance learners can benefit greatly from libraries and the information literacy skills taught by librarians; however, they also pointed out that without a concerted effort to promote these services, distance learners may not know that they exist. Mu et al. (2011) found that despite high user satisfaction, virtual reference drew low usage. Chesley et al. (2020) and Mu et al. (2011) recommended increased visibility on websites and further promotional efforts to raise the profile of

virtual reference services. Students enjoyed the social aspects of online services, such as opportunities to interact with fellow students in virtual learning environments, and expressed feeling disconnected in programs that offered limited opportunities for interaction (Chesley et al., 2020).

As university and college campuses closed their physical spaces in response to COVID-19, academic libraries increased their remote reference service offerings (Dar, 2020; Dodd & Kotaska, 2020; Walsh & Rana, 2020). Dar (2020) reported that although libraries continued to provide services remotely, some librarians expressed concerns that students may not realize these virtual services exist because academic library users may often associate library services with the physical space. In responding to the pandemic, many academic librarians echoed the desire to meet students “where they are” (Dar, 2020), recognizing that not all users have convenient or reliable access to remote services. Dar (2020) noted that while the shift to remote reference was new to students, it was also new for some librarians. Librarians reported challenges with the transition such as learning to use virtual reference tools and adjusting to conducting reference interviews over chat or email.

Methods

The working group designed a survey using Microsoft Forms, which consisted of 37 questions about reference service delivery, staffing models, and resources and tools and asked respondents to describe reference services at their libraries before the pandemic and during the pandemic. Prior to distribution, three librarians who were not part of the research team tested the survey. The researchers collected and discussed the testers’ feedback and incorporated it into the survey. The survey was distributed in August and September 2020. In total, the survey was distributed to 39 libraries across all three campuses at UTL. Twenty-four libraries participated in the survey, resulting in a response rate of approximately 62%.

Results

Reference Service Delivery: Reference Desk, Roving Reference, Booking Reference Appointments

In the pre-pandemic period, over 70% of libraries (17 out of 24) provided reference services at a reference desk. Almost 40% of this group (9 out of 24) used a merged reference desk. At a merged reference desk, reference services share a desk with another service, most commonly circulation services or information technology support services. One third of libraries (8 out of 24) used a single reference desk. Several libraries relied on an on-call model (4 out of 24), in which reference librarians were available to answer in-depth questions as needed but did not staff the reference desk. The survey found that only 8% of libraries used roving reference, while another 8% expressed interest in implementing this type of service in the future. Interestingly, zero libraries reported that they once provided a roving reference service and no longer offered said service.

In addition to offering casual drop-in services such as the reference desk and roving reference, most of the surveyed libraries allowed users to book reference appointments both before and during the pandemic. The most popular booking method in the pre-pandemic period was email, which all respondents who provided this service used, closely followed by phone, which over 70% of respondents used. Other common methods for scheduling were by online form, in person at the service desk, or via drop-in to a librarian's office. Because email can easily be adapted to the remote work environment, it is not surprising that it remained the most popular method for booking appointments during the pandemic. The online form, another booking method that can easily be integrated into virtual reference services, also showed no change in usage from the pre-pandemic to the pandemic period. By contrast, booking by phone decreased significantly and other methods that relied on in-person interaction dropped to 0%, such as scheduling appointments at the reference desk or dropping in to a librarian's office.

Before the pandemic, only 17% of libraries provided reference service through virtual appointment using video conferencing software. During the pandemic, 75% of libraries adopted virtual appointments by video conference. Before the pandemic, none of the libraries offered a drop-in virtual reference service by video conference, and during the pandemic, 17% of libraries explored offering this service. When asked to comment on whether they had seen a change in reference requests during the pandemic period, 25% of participants specifically noted an increase in consultation requests or in-depth reference questions.

Staffing Reference Services

In the pre-pandemic period, librarians staffed the reference desk in only 75% of responding libraries. Fifty-four percent of participants reported that library technicians were part of their reference services team, while student assistants provided reference services in 75% of responding libraries. At all libraries that employed library technicians or student assistants as part of their reference services team, these employees participated in staffing the reference desk.

All respondents reported that during the pandemic, librarians continued to provide reference services. In 46% of responding libraries, only librarians provided reference services, an increase of 20% compared to the period before the pandemic. In contrast, the number of libraries that included library technicians as part of their reference services team decreased from 54% to 38%, and those including student assistants on their team decreased from 75% to 29%.

Reference Service Hours

Fifty percent of the responding libraries reported reduced reference service hours during the pandemic. In the pre-pandemic period, 100% of respondents reported providing reference services on weekday mornings and afternoons, while 42% provided service on weekday evenings and 33% provided weekend reference services. During the pandemic, 75% of respondents provided service on weekday mornings; 88% provided

service on weekday afternoons; 25% provided service on weekday evenings; and 17% provided weekend reference service.

Many respondents reported that while they offered fewer reference service hours during the pandemic, they continued to provide assistance via email outside of scheduled hours. One respondent commented that their library did not have formal service hours but would respond to reference inquiries as questions were received. Another respondent noted the importance of flexible service delivery to accommodate student schedules and technical issues that occur when meeting virtually.

Reflections on Reference Service Delivery

The survey's final question offered respondents the opportunity to provide any additional comments or feedback about reference services. While no specific trends emerged from the answers, several respondents used this question as an opportunity to share personal feelings about the challenges and benefits that have arisen from the transition to a virtual reference environment.

Among the noted challenges, respondents mentioned their concerns about an "online-only" cohort's lack of engagement with online reference services and their concerns about faculty stress levels, which could lead to decreased interest among instructors in referring students to a librarian. One respondent also noted a concern about library staff returning to the physical library space while pandemic restrictions were still in place, given that socially distanced research consultations would not be possible due to the physical size of the librarian's office.

However, several librarians also shared their feelings about the benefits of the movement to online reference provision. Among the list of virtual reference benefits were the following reflections: there has been an increase in reference requests since the library moved to a fully remote model; virtual reference has offered reference providers a wider range of options for connecting with students; online consultations have been well-received by patrons. One respondent remarked: "Going forward, we will continue to offer the online option for reference consults since the technology allows for sharing screens, which is a massive improvement vs phone consults and even emails with screenshots." These reflections suggest that there is a sense of optimism and opportunity in contemplating the future of virtual reference at the academic library.

Challenges and Opportunities

Delivering reference service solely within the virtual environment presents many challenges for both libraries and library users at UTL. While library staff work hard to engage with users through various online channels, some users may remain confused about where to go for assistance, especially within a system as large as UTL. With smaller reference teams and the need to learn new tools for promoting and delivering services online, librarians face increased workload, steep learning curves, and increased need for flexible service hours.

However, the transition to a virtual environment has also presented an opportunity for academic libraries to revisit the ways they approach reference provision. In the pre-pandemic period, reference services at UTL revolved around the physical reference desk. Going forward, there may be increased opportunities to envision the library space and even the reference desk outside of their physical boundaries. Reference staff may ask themselves: How could the new tools used by library staff in the remote environment continue to be used once we return to physical spaces? How can we augment or re-envision research support to be more widely accessible to distance learners? What is the future of the virtual reference desk, which many libraries have staffed using applications like Zoom and Blackboard Collaborate during the pandemic period?

Continuing to offer virtual reference services could allow library staff to better reach some groups who do not frequently visit physical library spaces and to make reference services accessible for a wider range of library users. The need to approach reference in a purely virtual environment has motivated library workers to explore new tools and methods for engaging students. Experimentation may also result in establishing more streamlined workflows and best practices. Pausing in-person reference services has provided an opportunity to observe how library users are impacted by this change and to reflect on the value of physical service points and in-person interactions.

Limitations & Recommendations

When the authors distributed this survey, they could not predict how long the pandemic would last in Toronto. The unpredictability surrounding the pandemic made it difficult to determine how much libraries should invest in major changes to their services. In the greater Toronto area, COVID-19 cases were high in spring 2020, and dropped in the summer, following lockdown and other service restrictions. During the time the survey was conducted in August and September 2020, there continued to be uncertainty about how the fall term would look, whether classes would take place in person, and whether libraries would reopen their doors.

Throughout the fall term, libraries across the University of Toronto responded to their patrons' needs in various ways. A follow-up survey would be useful to capture the service changes that were implemented and how effectively they met patrons' needs. Further study could also investigate how reference service providers have responded to changes in service delivery. Given the increase in librarian workload, some topics of future interest may include librarians' wellness, mental health, and burnout.

While this survey focused on service providers, there is also an opportunity to investigate how students and faculty have used and perceived virtual reference services. The expansion of virtual reference services has allowed the UTL librarians to work with students living outside the greater Toronto area in an accessible, user-friendly way. However, previous studies have indicated that distance students are not always aware of reference service and that students who are aware of these services still prefer face-to-face interaction (Chesley et al., 2020; Sullo et al., 2012). It would be useful to

examine how students interpret the quality of reference interactions when comparing in-person services to virtual services, especially in the new, fully remote environment.

Conclusion

With their physical libraries closed in adherence to provincial public health guidelines during the pandemic, the University of Toronto Libraries quickly moved their services online. Reference service, which has long included both in-person components and virtual components such as email and online chat, became purely virtual without access to the physical library. The experience of providing reference services in the virtual environment may prompt libraries to make changes to their services, even after it is possible to safely return to physical library spaces. The expansion of virtual reference services in many academic library systems that previously relied heavily on their in-person offerings may change users' perspectives, preferences, and expectations around reference services. It may also create shifts in the work practices and preferences of reference staff. Looking ahead, a more fulsome investment into remote reference options may allow for new opportunities to reimagine reference services and develop an increasingly accessible library environment.

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