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Bad Moon Rising: A Candid Examination of Digital Reference and What It Means to the Profession

Jonathan D. Lauer & Steve McKinzie

SUMMARY. The profound impact of digital reference claimed by its proponents is overstated. Librarians tend to overvalue technology, assume its intrinsic value in improving library operations and services, and undervalue the human factor of librarian expertise and professional competence. Overstating the impact of trends within librarianship is a cyclically recurring phenomenon and the hype surrounding digital reference is a current example. In most libraries, the adoption of digital reference is not likely to be cost effective nor its utility an improvement on structures already in place and functioning well. Librarians have difficult decisions to make regarding the allocation of resources. The superiority of traditional reference approaches should not be gainsaid by misdirected emphasis on digital reference.

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Some in the library world hail digital reference with such enthusiasm that they imply it may be more revolutionary than the MARC format and more useful than the creation of the online index. We disagree. In-deed, we are generally skeptical about digital reference's overall useful-ness and value, and by the profession's tendency to be uncritically enthusiastic about the advantages of every form of new technology. The library world has been far too gullible, far too willing to regard any technical advance as a service advance, too eager to insist that whatever the new technology may be, it will inevitably provide better, more convenient, more effective service for our patrons. Half the time we have been wrong about the supposed value of these various technologies and the rest of the time only half right.

In this article, we dispute the more enthusiastic proponents of digital reference, some who even appear in the pages of this publication. In doing so, it is important to note what we are not claiming. We are far from saying that digital reference does not work, or that it is of no value. On the contrary, in certain places and in certain contexts, digital reference can be highly useful and effective. Neither are we asserting that technology itself is at fault nor that it merits immediate distrust. Technology has much to offer, and librarians should explore thoroughly its potential and promises. It is only when our colleagues champion the superiority of digital reference over traditional forms of reference that we grow alarmed. In other places, we have argued that digital reference could affect collection development adversely and that it may be overrated.1 Here we argue more comprehensively. We contend that digital reference, placed in the immediate context of reference and library pedagogy and the broad context of professional librarianship and human culture, has three major problems. These realities should force librarians (practicing reference librarians and administrators alike) to take a hard and critical look at the entire phenomenon. We elaborate below.

First, librarians tend to overvalue technology, and the largely uncritical enthusiasm about digital reference is a case in point. We have skipped down the primrose path of supposed radical paradigm shifts be-fore. It may profit us to be cautious, even skeptical, about the radical changes that technology has wrought or that librarians claim it has effected.

Second, the value of digital reference has been overstated. We charge that the new service is not cost effective and that, from the perspective of efficiency and practicality, is often not worth the investment. Quite frankly, it fails to measure up to the advantages of more traditional and less expensive approaches to reference.

Third, and perhaps most disturbing of all, the hype surrounding digital reference reveals the profession's fascination with dispensability, a pernicious tendency to undervalue librarian expertise and professional competence. It is almost as if librarians are trying to work themselves out of a job, a perspective that is as unrealistic as it is damaging to the profession. Digital reference, if it is to be effective, ought to complement traditional reference, but only where a need for it is clearly evident, its advantages clear, and its cost effectiveness thoroughly demostrated. Too often, however, it either undermines or downplays more effective service alternatives.

All three of these concerns force us to look askance at digital refer-ence. Although we applaud those who are ready to explore new options and to push the envelope, we believe caution, even skepticism, may be for most libraries the best response to digital reference, a service whose time has not yet come and may, indeed, never come for most libraries.

TECHNOLOGY, PARADIGMS, AND UNFETTERED ENTHUSIASM

Anyone who takes the time to view librarianship outside of its immediate context has to concede that the profession tends to overstate the effects of technology. Every so often the profession fairly loses its head over some peripheral issue and goes bonkers. If you have been following the profession's fascination with digital reference service, you will no doubt conclude it is like that now. The term "digital reference service" is not easy to define, but it can best be understood as reference service in "which people submit their questions and have them answered by a library staff member through some electronic means (E-mail, chat, web forms, etc.), not in person or over the phone."2

Champions of this latest form of reference are not shy about their new-fangled alternative, nor do they downplay the magnitude of the changes they fancy are upon us. The more rhetorical among them argue that reference, as we know it, is about to change forever. They insist that the user culture has altered drastically. Fiber optics, the Internet, and patron expectations have overturned everything. In fact, they contend, the new way of approaching things is so fundamentally different from the old, that reference librarians will have to transform their role radically. The new revolution will mean altered codes of conduct and altered modes of operation. And they deem librarians who support reference service will need "new sets of values and beliefs."3 Now, before we embrace this new paradigm, all of us in the profession would do well to remind ourselves that this is déjà vu all over again. These less-than-balanced calls for an overhaul of the

profession and incautious clamors for a total reinvention of library services seem to occur in cycles.

In the 1960s, librarians argued that microforms (film, fiche and cards) would render library building expansion unnecessary. Libraries would need no more shelf space. In the 1980s, library administrators contended that the debilitating properties of acidic paper would soon destroy vast percentages of our bound holdings. The "slow fires" of acidic paper were expected to devastate much of what our libraries contained by the new millennium. Some even called for the deacidification of vast numbers of books and the development of the technology necessary to undertake this urgent project. In the 1990s, iconoclastic techno-crats argued that digitization would render print collections obsolete. Print was dead or soon would be. Not only that, libraries themselves would be replaced by the World Wide Web.

Right now, advocates of digital reference are telling us that we must create a new paradigm, evolve into a higher species of reference animal (with an accompanying approach to collecting reference resources), or lose our place in the information food chain. Like their esteemed col-leagues of the past, the no-expansion librarians, the acidic paper alarmists, and the proponents of an all-digitized future, the new revolutionists are victims of their own hyperbole. The current moment in library his-tory is not as revolutionary as they purport. The changes abroad are not as great as they allege. Proponents of the supposed "new paradigm" of reference are overstating their case. It is time to regain our bearings and recover our sanity. Or, to put it more succinctly, we need to rediscover and reassert the strengths and dynamism of traditional reference.

EFFECTIVENESS, COST-EFFICIENCY AND LIMITED RESOURCES

Please do not misunderstand us. Librarians ought to be exploring E-mail Reference, Instant Messenger chat, and the host of other interactive technologies that promise to help us disseminate information to our users and knowledge into the minds of our readers. Digital chat and Instant Messenger reference, especially such interactive products as LSSI, 24/7, certainly have their place in the reference librarian's tool kit. But giving a tool or, more specifically, a practice, a place in the toolbox, is altogether different from adopting a new paradigm. In order to appreciate the place and purpose of this new reference tool, however, we need to consider some of its disadvantages. We suggest there are three key service issues that should be kept in mind to understand digital reference, issues which lead us to assert that traditional reference is still the best way to serve our users.

First of all, most forms of digital reference are slow–slower than tele-phone discussions, slower than one-on-one, face-to-face interaction. Librarians at the University of Illinois report that the average digital reference transaction runs nearly ten minutes–more time, they admit, than would be required in person or even over the phone.[4] The reference staff at Lippincott Library of the Wharton School of the University of Pennsylvania experienced a digital reference transaction time lapse similar to the University of Illinois. They also admit that digital reference inter-actions take them considerably longer than other forms of reference. Chat has a "different pace" than telephone conversations.[5]

In addition to the extra time needed for such transactions, one has to face the added administrative challenges the alternative service entails. Even a casual exploration of the literature regarding digital reference service reveals librarians' candor about the extra burdens it presents. They note a profusion of new demands: additional software to master, new procedures to adopt, extra protocols to establish, significant new costs to explain, and new ways to deal with their regular users–ways that are often neither effective nor helpful. As one author conceded, "When engaged in chat, it can be awkward explaining to a patron walking up to the desk that the librarian is in fact helping another patron, not just checking e-mail or ignoring them."6 All of these drawbacks–enormously significant in the difficult world of scarce resources and growing librarian responsibility–dovetail with what we consider to be the biggest restrictions of digital reference. In the final analysis, digital reference is only limitedly effective. For all of the hoopla about reaching out in extraordinary ways and in unusual times, digital reference ultimately fails our users. It neither meets their information needs efficiently nor deepens their research capabilities.

We can connect with them at their convenience and on their terms to a point, but the seeming advantages fail to outweigh the service's genuine shortcomings. Digital reference does not give us, as public service librarians, the kind of in-depth contacts with our users that will enable us to build relationships or develop their searching capabilities.

In traditional reference service, librarians offer assistance that is face-to-face, locally based, and decidedly human. We believe that in-person, genuine real-time reference involves moral and emotional elements that are impossible to tap through disembodied online interaction. Consider, for example, the well-recognized educative functions of reference service. Whether we are practitioners at a small liberal arts college or librarians at a large public library, our role is the same. We are cultivators as much as disseminators of knowledge. We model habits of information trolling, gathering, selection, and dissemination–practices that are extremely difficult to develop over fiber optics.7

Moreover, any reference librarian can attest to the relationships that develop over time with students or readers who repeatedly seek out the librarian/mentor who first provided the service and inspiration to tough out a difficult research assignment. These relationships require contact face-to-face, in real time, in a given place.

This is why digital reference as a complete service has serious limitations. The Internet (for all of its advantages and wonders) is only minimally interactive. Anyone who has been part of a chat room, a listserv discussion, or an Instant Messenger conversation knows the limitations of these media relative even to a telephone conversation.

Online interaction can be dehumanizing and disembodying in ways that the telephone is not. It may be too much to say that digital reference service is always decontextualizing, dehumanizing, or necessarily fleeting, but certainly this is often the case.

THE HUMAN FACTOR IN INFORMATION TROLLING AND WHY IT WORKS BETTER

Two personal experiences illustrate the restrictions of digital reference. Although the illustrations are drawn from non-librarian contexts, they demonstrate how truly limiting a solely automated information source can be and how effective a more traditional approach can be-come.

Steve's Experience

Occasionally I purchase clothing from L. L. Bean of Camden, Maine, a company that clearly integrates cutting-edge technology and human creativity. L. L. Bean offers an online, graphic-friendly catalog, the kind that anyone who has searched online finds welcome and efficient. But often the catalog is insufficient. I cannot always be sure what products are still available, or if an item looks exactly as it appears. After selecting merchandise, I usually call a sales representative to confirm the availability of my choice, and to discuss nuances of the product not completely discernible on computer graphics. After all my questions are answered, I complete the transaction without the uncertainty of having ordered in the absence of a human intermediary.

I am thankful the marketing strategists at L. L. Bean understand the importance of this human dimension. Had they been thinking as some technophoric librarians, they might have reasoned that a purely digital approach would be more technically sophisticated, less expensive to operate, and undoubtedly the wave of the future. A solely technology-driven approach might earn the immediate admiration and envy of their competitors, as well as the lasting praise of their in-house information technologists. Fortunately, L. L. Bean understands that a completely automated approach would, in fact, result in diminished customer satisfaction and, therefore, reduced sales. Instead, they insist that a cadre of intelligent, articulate, well-trained people staff the phones. They recognize that connectivity and human interaction are absolutely necessary for effective marketing.

Jonathan's Experience

Allow me to recount recent planning before attending a major professional conference. Hoping for lodging outside the conference hotel syndicate, my wife and I decide to explore Bed & Breakfast options. A trusty Google search yields numerous possibilities, some of which, on investigation, are already booked. A clearinghouse service, however, lists 13 downtown and Toronto Island Bed & Breakfast establishments and proves to be the treasure trove we need. I survey the choices online, comparing features and location to our desiderata.

Online registration could complete my investigation, provided I can determine our first and second choices, but I have many questions that the website in question simply cannot answer, regardless of how many links it includes. Are our first and second choices still available? Should we wish to stay on the Islands, where would we park our car? What is the daily fee? What is the ferry schedule? How late in the evening does it run? What is the fare? I need answers to these questions before booking makes sense, so I call the toll-free number listed as an alternative to booking online.

The result of that call is a pointed reminder that I am still human and that the quickest route to an answer is another human. The booking agent is cordial, knowledgeable, patient, and informative as only an educator can be. All my questions are answered in five minutes through voice-to-

voice, interactive conversation, professional to professional. Any online alternative, including a chat or instant messaging system, would have been decidedly inferior on all scores–efficiency, effective-ness, accuracy of information, but most important, completeness to the point of satisfied closure. I book and receive E-mail confirmation within 12 hours.

These two examples illustrate what is felt, perhaps even by a silent majority, but articulated only with caution by most, for fear of inviting ridicule as Neo-Luddites. We freely admit that we want more, not less, human interaction in the satisfaction of our information needs. We do not want more inscrutable, inefficient, ineffective phonetrees that rarely give exactly the option we need, nor do we want one more carefully crafted but, again, invariably inadequate and unsatisfactory FAQ link on a website, no matter how deep we can drill. And why type an Instant Message and wait for the alienating technological sound prompt of the reply when talking voice-to-voice is so superior? What we maintain here is that technological connectivity is also a barrier to communication and, as such, a sometimes unnecessary impediment, and an inferior substitute to what is already in place. In short, digital reference is a poor substitute for the telephone.

Stephen Talbott offers a cross-cultural illustration of this very point in his review at Wade Davis's One River: Explorations and Discoveries in the Amazon Rain Forest.8 Talbott recounts in detail Davis's experiences observing the marvelous skill of a young Ecuadorian Waorani warrior named Tomo as he hunts with a centuries old technology, the blowgun. Using poison-tipped darts, Tomo can "drive a dart through a squirrel at forty feet, knock a hummingbird out of the air, and hit a mon-key in the canopy 120 feet above the forest floor."9 Yet Tomo and others prefer to use shotguns! What is the appeal of this far inferior, obviously ill-suited-to-the-task weapon? "It is the intrinsic attraction of the object itself, the clicking mechanisms, the polished stock, the power of explosion."10 So it seems to be for many in librarianship as they investigate digital reference. Digital reference is to real-time, real-place, or even telephone reference what the shotgun is to the blowgun for the Waorani. Why not get back to superior basics and invest our time and energies in increasing the number of well-educated librarians rather than in inferior gadgetry?

PLANNED DISPENSABILITY: DIGITAL REFERENCE AS PART OF THE PROBLEM

Our third concern with digital reference is more philosophical or, to some degree, more psychological. Aside from digital reference being part of a technical rhetoric that has become all too typical of librarians and its failure to compete with the more dynamic and more human dimensions of traditional reference, the enthusiasm for digital reference mirrors a significant problem with librarianship as an enterprise. Librarians have never satisfactorily answered the question of whether or not librarianship is a profession. The present authors certainly believe it is, but we contend that, in terms of the prevailing behavior of our col-leagues, ours is a minority view.

The majority viewpoint, which by its actions argues for a non-professional view of librarianship, manifests itself in a most peculiar corporate behavior, one that is driven, we suspect, by insecurity and low self-esteem. We call the behavior "planned dispensability," something we will discuss in more detail below.

First, allow a word about librarianship's self-image malaise. You know the historic arguments summoned to explain our angst: a low-status occupation becomes female-dominated in the early years of the 20th century; social injustice in an economy-crazed culture keeps salaries low; a service occupation that develops a highly technical craft then be-comes denigrated for lack of a rigorous body of knowledge driving its practice; a cadre of introverted personalities populate the field–all these coalesce to help perpetuate a cycle of ignorance in the general populace of the intrinsic value of our work.11 So in response, we promote, unwittingly in some cases, consciously and blatantly in others, the concept of planned dispensability. This psychoanalysis may appear far-fetched, but it is hard to explain the seemingly inexplicable corporate behavior by any other means.

Ironically, such behavior parades itself as a virtue. It has become ensconced, at least in the unwritten folklore of our enterprise, as a moral value of our profession. More evident in the so-called public services, this dysfunction is also present in technical services and is championed by many a library administrator. To be sure, empowerment of our readers is a good thing. But success at teaching the process of locating relevant resources falls far short of rendering the purveyor of that knowledge dispensable. Nevertheless, what we project and even articulate is that we will know we have been successful when we are no longer necessary. Our job and our goal is to educate and train our readers so that they no longer need our mediation.

This training, it must be pointed out, is not a mentoring of persons who will replace us as librarians. Rather, it is educating our clientele to become entirely independent of our intervention. This is an information literacy enterprise that proves the sages and the library-use educators passé and dispensable, and we present this as a goal of our work! When pondered dispassionately and carefully, this corporate behavior is not only counterproductive, but also tells a self-destructive lie that will lead to the demise of our profession.

Those who worry about our profession surviving until their retire-ment are not getting any younger. The cruel irony is that many of our young Turks, aided and abetted by mid-career librarians who should know better, are hastening the end of librarianship. Our lemming-like distraction with digital reference is a perfect case in point of a mis-guided profession grasping at the wrong straws.

The discussion brings us to our long-held conviction that the shortest distance between a reader's information need and fulfillment of that need always has been and always will be a human resource, dare we say it, a librarian. Dr. Johnson rightly describes two types of knowledge, that which we know and the knowledge of where to find what we do not know immediately. We will die as a profession if we continue to denigrate and deny the vast body of knowledge residing between the ears of our MLS-degreed practitioners and perpetuate the deleterious myth that our success lies in our planned dispensability, often aided by the latest razzle-dazzle to come out of the Silicon Valley. Digital reference is particularly pernicious because if offers the verisimilitude of real-time human interaction, but by its very nature and cost-time to investigate, purchase, learn, incorporate into workflows, and maintain–it dissipates attention and resources from more fundamental, valuable, and effective library services. This is too high a price to pay for the supposed bolstering of relevance its proponents claim it garners, especially in light of its complicity in the self-defeating doctrine of planned dispensability.

Some of you familiar with the Chicago area will know Morton Arboretum in Lisle. Fewer will know the late Floyd Swick, self-educated polymath and longtime botanist there. Floyd was wont to quip that there are two kinds of botanists. The first type goes into the field, gathers specimens, peers at dead plant fragments under a microscope, and eventually ventures an identification. The other type simply knows the plants.

We librarians know the sources and our mediation is indispensable to our clientele and to the healthy future of our profession. Information, knowledge and, sometimes even wisdom, is best imparted face-to-face in real time and in real proximity to another human being. To lose sight of this truth is to dissipate our energies and to hasten the demise of librarianship. Hence, our prophetic caution about the overly enthusiastic attention many are giving digital reference services.

CONCLUSION

Our threefold caveat about digital reference is not intended to dis-credit the potentials of the service. Librarians should be open to any-thing that enhances user services and enables us to serve our readers better. Digital reference should be part of the librarian tool kit at some libraries.

Nevertheless, we must keep our heads and shun the high-flown rhetoric to which our profession is so prone. Digital reference has not fundamentally altered the way we do reference nor should it. Our readers need human connectivity and human expertise. Technologies that enhance that human dimension–for example, the telephone–should not be gainsaid simply because they are older communications technology. We should see digital reference as a viable, but as yet unproven vehicle of service. Moreover, the seeming advantages of digital reference as a full-service approach to reference fail to counterweigh its deficiencies. The energy and cost of putting such a service into operation could undermine more traditional and, let us admit, much more effective forms of service.

Librarians, we assert, have difficult choices to make about where we channel our time and energies. We already have a substantive, effective, non-digital tool kit of powerful reference apparatuses. There is surely no need to revamp our approach to collection development or to weed print resources which have been proven workhorses in a face-to-face reference environment. Despite the revolutionary rhetoric that seems to emerge in decade-like cycles in library circles, digital reference can only serve as a complement to the regular modes of library public ser-vice. Digital online service modules and electronic resources can never equal the potency and effectiveness of on-site, in-house, in-place, and wholly interactive traditional reference practice and time-honored paradigms of reference collection development.

1. Steve McKinzie and Jonathan D. Lauer, "Digital Reference: A New Library Paradigm or the Emperor's New Clothes," Against the Grain 14, no. 4 (September 2002): 34, 36, 38, and "Virtual Reference: Overrated, Inflated, and Not Even Real," The Charleston Advisor 4, no. 2 (October 2002): 56-57.

2. Joseph Janes, David S. Carter, and Patricia Memmott, "Digital Reference Services in Academic Libraries," Reference and User Services Quarterly 39, no. 2 (Winter 1999): 145. Note:

Although such interactive librarian services as OCLC's Question Point may constitute a form of digital service, our immediate concern in this article is with the more interactive modes–a practice we exclusively refer to throughout the arti-cle as "digital reference."

3. R. David Lankes, John W. Collins III, and Abby S. Kasowitz, Digital Reference Service in the New Millennium. New York: Neal-Schuman, 2001, p. 11. See further Carol Goodson, Providing Library Services for Distance Education Students, New York: Neal-Schuman, 2001: 3-6.

4. Jo Kibbee, David Ward, and Wei Ma, "Digital Service, Real Data: Results of a Pilot Study," Reference Services Review 30, no. 1 (2002): 35.

5. Linda Eichler and Michael Halperin, "LivePerson: Keeping Reference Alive and Clicking: Chat Technology for Reference Services at Lippincott Library," Econtent 23, no. 3 (June/July 2000): 63-6.

6. Jo Kibbee, David Ward, and Wei Ma, "Digital Service, Real Data: Results of a Pilot Study," Reference Services Review 30, no. 1 (2002): 35.

7. We acknowledge our indebtedness in this section to the trenchant case made by Diekema and Caddell in their recent article regarding the limitations of digital education. See David Diekema and David Caddell, "The Significance of Place: Sociological Reflections on Distance Learning and Christian Higher Education," Christian Scholar's Review XXXI, 2 (Winter 2001): 169-84.

8.   Stephen Talbott, NetFuture #141 (www.netfuture.org): 1-11.

9.   Talbott: 2.

10.   Talbott: 3.

11.   This brief encapsulation of the last 125 years of library history in no way disparages the groups it describes. It rather seeks to suggest broad swaths of reality that have contributed to what we argue are unnecessary and counterproductive thinking and behavior within our profession.