



Date: June 19, 2007

To: The California Public Library Community

From: Susan Hildreth  
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*Susan Hildreth*

Re: A New Statewide Reference Model

Ever since the California reference service focus groups were held in the summer of 2005, I have been thinking about next steps for second-level reference in California. While I'm aware that not all participants in those focus groups were satisfied with the way the discussion was structured, one point reported by the focus group facilitators, Sandra Nelson and Diane Mayo, really resonated with me and apparently struck a chord with the participants as well: the belief that

"Participants in all groups agreed that by 2015 second-level reference services as they are configured now will have been replaced by a centralized reference service that will provide a seamless interface for the client. The only issue open to discussion was how soon this would happen..."

I was heartened to see how everyone agreed that second-level reference centralization was going to happen, one way or the other. The concept was further validated in the focus groups on CLSA cooperative system services conducted and facilitated by Maureen Sullivan later in 2005. One recommendation emerging from those discussions was

"Investigate the feasibility of making Reference a statewide program."

I knew that the CLSA system reference centers were not functioning in the same way they did when they were originally created. Questions had declined over 50% in ten years. The availability of instant access to information had radically

changed for the consumer, and the library was just one of many potential sources to consider. Some reference centers had disappeared and systems were contracting for second-level reference service. Some systems were spending their CLSA reference allocation on training and other reference-related activities as much as or more than question answering. It was time for a change.

One of the big questions to my mind was whether we could adapt or evolve the current regional approach to second-level reference into a statewide program or would we have to start anew? Likewise, if it was to be completely or partially a virtual service, would we look at AskNow as the base upon which to expand?

I decided that my staff and I and you, the library stakeholders throughout the state, needed outside, impartial, professional assistance. With the help of LSTA grant funds, in 2006 we were able to procure the services of Ruth Metz, an independent consultant based in Portland. Ruth had a background with CLSA but had been out of the state for several years. I asked Ruth to review all of your comments and suggestions from the two sets of focus groups, to look anew at the current condition of CLSA second-level reference throughout the state, and to develop a plan for developing a new CLSA reference model. The scope of work prepared by Ruth can be found at

[www.library.ca.gov/assets/acrobat/NewRefModel.pdf](http://www.library.ca.gov/assets/acrobat/NewRefModel.pdf)

Ruth has been working on the plan since last October, doing more background research, interviewing service providers, expert informants, and consultants and developing a new reference model scenario, all the while working very closely with my staff and myself. In April she presented a slide presentation of the result of her work to date to the Library of California Board, introducing a model of a CLSA virtual centralized reference portal accessible to both the public and librarians that was built on the strength of the best of the current CLSA reference model. She also gave the Board a background summary of the project. Updated versions of both of these documents – the slide presentation and the background summary – are available at

<http://www.library.ca.gov/assets/acrobat/CARefDesign.pdf>  
<http://www.library.ca.gov/assets/acrobat/CARefBkgnd.pdf>

Ruth has since produced a concise description of the proposed statewide reference design; it is available on the State Library's website at

<http://www.library.ca.gov/assets/acrobat/RefDesign.pdf>

I urge you to read this document, and then, I would like to hear from you. I am interested in seeing your suggestions about how this could occur in your CLSA cooperative system. How would this approach to statewide reference impact your system's current reference operations as well as your own library's

reference service? Do you have ideas about how this plan could be implemented?

I would like all of us to begin moving forward with this concept. We will begin recruitment for a statewide reference project manager with the goal of having that person on board by the end of this summer. We anticipate that one of the many duties of the project manager will be to travel to the CLSA systems to talk to you about current system reference services and how a new statewide second-level reference plan could be implemented. We also will undergo a thorough review of the law and system reference plans. I am committed to having a prototype model ready in spring of 2008. Yes, it's an aggressive timeline, but we need to jump-start the reference evolution now!

Please email your questions, comments, and suggestions for implementation to Rush Brandis of my staff at [rbrandis@library.ca.gov](mailto:rbrandis@library.ca.gov). I want to emphasize that while this is far from being a done deal and that some elements may change, I do see it as the path we should take and I look forward to your help and guidance.