Roving Reference with iPads:

a study of the use of iPads as technological support and service assessment

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IFLA 2011 Puerto Rico

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Christine Brown and David Sulz – 3rd collaborator is on maternity leave

## Rutherford Library

❖ 2 large, complex buildings
- 5 floors each, connected by atrium
❖ 100s of computers
❖ 1800 work spaces
❖ 2 million volumes on-site
❖ 6 million volumes off-site
❖ 10 million volumes in consortium catalogue
❖ extensive digital collections

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Digital collections:

-1000 journal indexing databases
- 1000s ebooks
-50 000 journal subscriptions

Rutherford Library
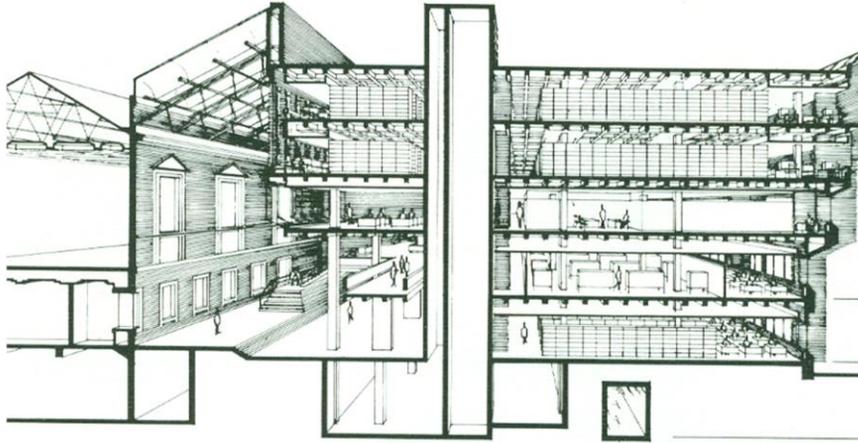
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Large and Complex

YOU ARE IN RUTHERFORD *SOUTH*

WHERE IS MY BOOK?

"ON SHELF" LOCATIONS IN RUTHERFORD (UAHSS):

CALL NUMBER	BUILDING & FLOOR
A – AZ	South 1
B – BD	South 1A
BF – E	North 3
F – LT	North 4
M – MT	North 2
N – PC	North 4
PD – ZA	North 5
GOV DOC A – CA1 SA 2-43	South 1A
GOV DOC CA1 SA 2-44 – UK1 W	South 2A
GOV DOC UK1 X – ZZ	South 2A

OTHER LOCATIONS IN RUTHERFORD:

Bibliography Room	North 3
Data Library	North 1
Indexes	North 1
Microfilm/Microfiche	North 2
Music Library	North 2
Reference	North 1
Reference Auxiliary	North 2
Special Collections	South Bsmt

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Nooks and Crannies

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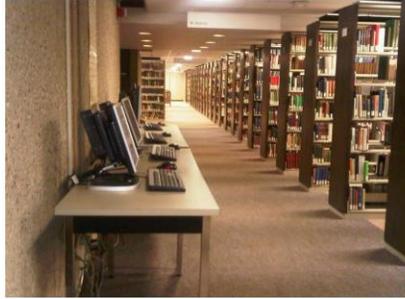
Pilot project objectives

1) Value of face-to-face help to on-site patrons far from service desk

2) Evaluate iPad suitability for roving reference

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Guiding questions

Roving Reference
- ❖ Evidence of patron need and appreciation
- ❖ How to identify and approach patrons
- ❖ Logistics of offering

iPad
- ❖ effectiveness for reference and assessment

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Method

Offering service
- ❖ volunteer staff signup, self-determined times
- ❖ training: iPad use, technique brainstorming

Awareness & Approaching patrons
- ❖ sandwich boards, individual comfort level

Assessment
- ❖ short online survey (patron & staff)
- ❖ responses grouped by emergent themes

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Discussion Points

Summary
- ❖ 62 patrons helped, 35 survey responses
- ❖ 9 staff, 21 hours, 21 surveys + informal

Diffusion of innovations theory (Rogers)
- ❖ relative advantage
- ❖ compatibility
- ❖ complexity
- ❖ trialability
- ❖ observability

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Relative Advantage: comparison (better/worse) with a current practice/method.

Compatibility: fit with the values and needs of the adopter

Complexity: ease/difficulty of use, implementation, or understanding

Trialability; ease of experimentation during adoption or intuitive understanding

Observability: extent that the innovation or results of adopting the innovation can be observed by others (more visible drives communication within network - creates positive or negative reactions.

Relative Advantage

Roving ref
  P: convenient & helpful (just-in-time, point-of-need)
  S: ↑ familiarity with patron activities & subject areas
  "Dis": scheduling, promotion, approach patrons

iPad
  P: share the screen, "cool"
  S: portable, wireless, assessment gathering
  "Dis": editing, text entry, connect to ILS

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Relative Advantage: comparison (better/worse) with a current practice/method

P = patron, S=staff, Dis=relative disadvantage

RovRef:
Patrons: more convenient than going to desk or desk or contacting by email/chat/phone
Staff become more familiar with areas of library away from office and service desk
Relative disadvantage

iPad
Patrons
Staff
Disadvantage: example is retrieving PIN #s to place hold through catalogue

Compatibility

Roving Ref
- P: staying put (keep space, not move)
- S: service values:
- Incompatibility: discomfort approaching patrons
    - -training required & expectations discussed

iPad
- P: library as techno-savvy. mobile access, instant feedback
- S: explore new service tools & methods, service assessment, portable
- Incompatibility: ?

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Compatibility: fit with the values and needs of the adopter

RovRef

Patrons don't want to give up workspace and deal with belongings to go seek help
Staff value service to patrons where and when they need it, respond and anticipate user needs
Incompatibility: some staff just aren't comfortable approaching patrons – feel like a retail salesperson, don't want to intrude

iPad

Patrons already see library as techno-savvy and information experts, fits with desire for mobile access, allows instant and easy feedback compared to going to a website later

Complexity

Roving Ref
- P: service comes directly to them
- S: replicating existing service
- Issues: staff scheduling, training for approaching patrons

iPad
- P & S: intuitive, portable, fairly familiar
- Issue: no print-outs, fewer functions than desktop

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Complexity: ease/difficulty of use, implementation, or understanding

RovRef
Simple in some ways because we approach patrons and it is not yet an expectation but patrons may not be clear about who can help them and when/where the service is available

Staff scheduling to get most benefit is a decision to be made. Often tricky to determine which patrons would appreciate help.
Most library staff doing reference have a desire to help patrons. Assign this as a shift during certain times of the day/year

iPad
Since the patrons didn't use the ipad except to fill in survey, there is little to say about complexity except perhaps that result of reference help couldn't be printed out and it might be difficult for patron to rplicate the process later since they only watched the staff.
Staff found that not everything possible at a service desk could be done – portability tradeoff.
Workarounds required. E.g. finding out student PIN # to place hold: used chat ref (had to establish credentials) then later found a desktop connect app which requires some IT permissions

Not unexpected when you're testing the limits to find things that can't be done the same way.

Trialability

Roving Reference
  P: no issues because it was a surprise service
  S: attracting volunteers, training, promotion

iPad
  P: only used for survey, intuitive
  S: mostly intuitive
  Issues: cost to buy iPads, configuring for
    multiple users

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Trialability; ease of experimentation during adoption or intuitive understanding

RovRef
No issues around experimenting for patrons as it was a surprise service and we approached them
Attracting staff volunteers who were not assigned or required and had busy schedules was some barrier to piloting many shifts. Some training was required to even experiment as was some promotion via signboards.

iPad

Staff found some functions unintuitive e.g. backspacing or deleting from the middle of text. iPads seem to be designed for a single user e.g. email automatic synching, requiring iTunes account even for free apps.

Observability

Roving Reference
  P: patrons can see staff helping
  S: staff gauge patron reactions, survey responses
  Unobservable: real feelings, responses not
    entered in survey.

iPad
  P: library-related usefulness, steps & processes
  S: some reference Qs, patron feedback

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Observability: extent that the innovation or results of adopting the innovation can be observed by others (more visible drives communication within network - creates positive or negative reactions.

iPad
Patrons and staff can see the iPad (tablet) in action for library research, feedback, reference questions

Conclusions & Implementation Tips

- advantages > disadvantages
- easy and cheap to "trial"
- who roves?
- when (random or consistent)?
- overcome complexity with training & administrative commitment
- promotion & awareness (service, rovers)?

Implement iteratively (fail early, cheaply, often)

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