Virtual Dave Lankes

Presentation

http://www.DavidLankes.org

ABSTRACT: Presentation on the digital reference research agenda.

Digital Reference Research: Fusing Research and Practice

R. David Lankes

Executive Director, Information Institute of Syracuse

Syracuse University's School of Information Studies

http://www.DavidLankes.org/

Digital Reference Research Agenda

- Defined as a Reference Document that Seeks to Indicate:
  - The scope and scale of a phenomena
  - What is known about a given phenomena under investigation
  - What gaps are recognized in the understanding of a phenomena
  - A common belief of the priorities of in filling the gaps in understanding

Background

- VRD 2001 Closing Session Call for "Moving Beyond 1000 flowers"

- Digital Reference Research Symposium
  - Information Institute of Syracuse, National Library of Canada, Association of College & Research Libraries, Harvard university, QuestionPoint with participation by the Institute of Museum and Library Studies and the Library of Congress
  - http://quartz.syr.edu/symposium

Background: White Papers

Tasks	Topics
Define the topic under consideration	Question Negotiation in an Electronic Environment *Janes*
Review the current state of the art in this area	Education for Digital Reference Services *Smith*
Provide some empirical data regarding issues and strategies	Standards, Systems and Software for Digital Reference *McClennen*
Offer options and SPECIFIC recommendations for how best to resolve the issues and make some progress in this particular area.	Fit of Digital Reference into the Digital Library Arena *Pomerantz*
Clarify the issues/challenges that need to be addressed	Policies and Standards for Digital Reference in Consortia *Whitlatch*
	Digital Reference in Primary and Secondary Education *Lankes*
	Image Intermediation *Goodrum*

Symposium

- Harvard University
  - August 1-3 2002
  - 35 participants from:
    - Libraries
    - Academia
    - Government
    - International
    - Vendors

Background: Synthesis

- Track leaders at 2002 Virtual Reference Desk Conference

- ACRL PIL Publication

- JASIS&T

- RUSQ?

Progress Through the Agenda

Conceptualization: Determining the fundamental field and conceptual structure of the field

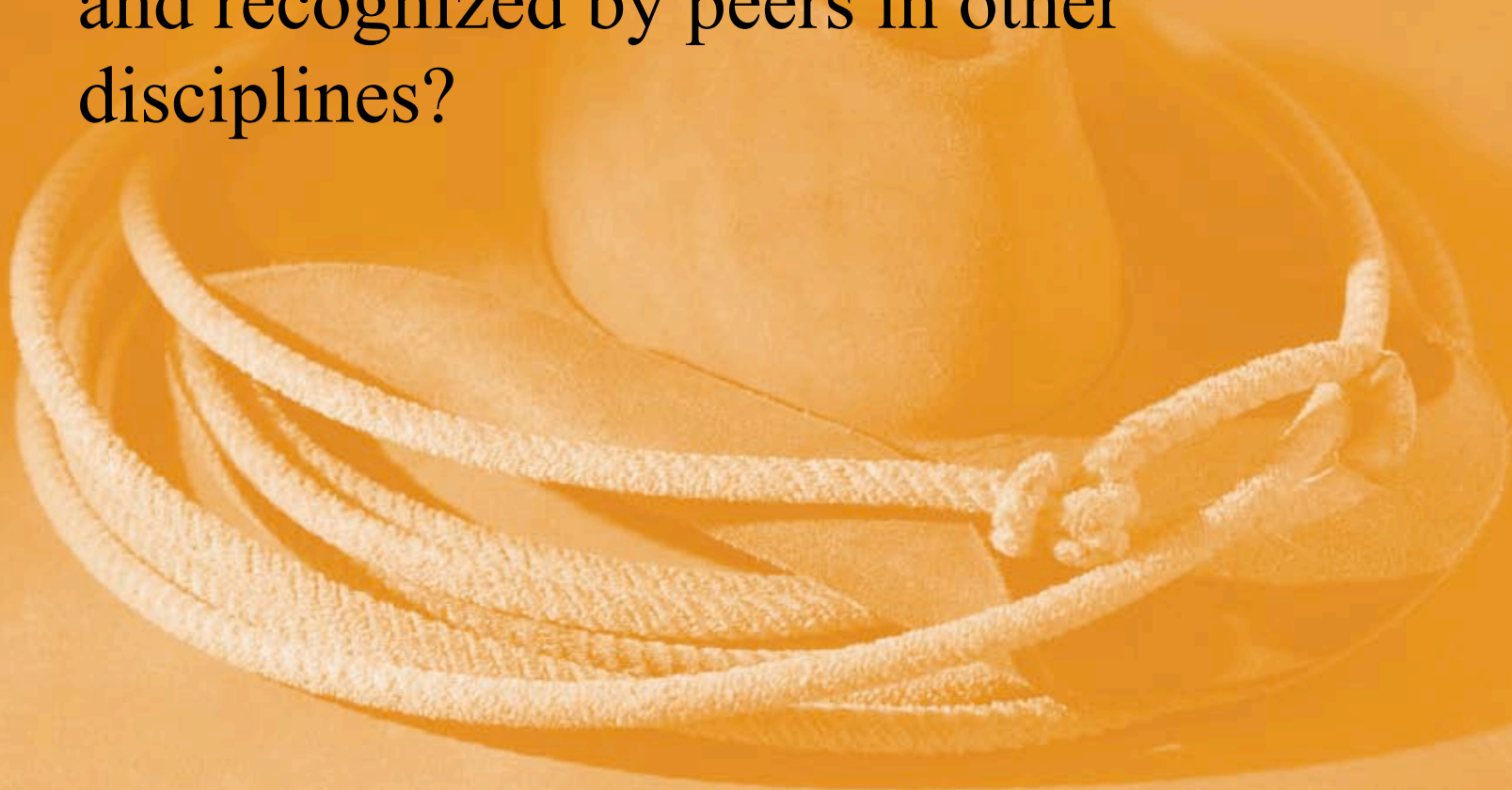Operationalization: Translating the abstract concepts into actionable items and questions

Implementation: Obtaining results from the research questions and putting them into practice

Arms' Thought Experiment

- What contribution would a digital reference researcher make that would be significant and recognized by peers in other disciplines?
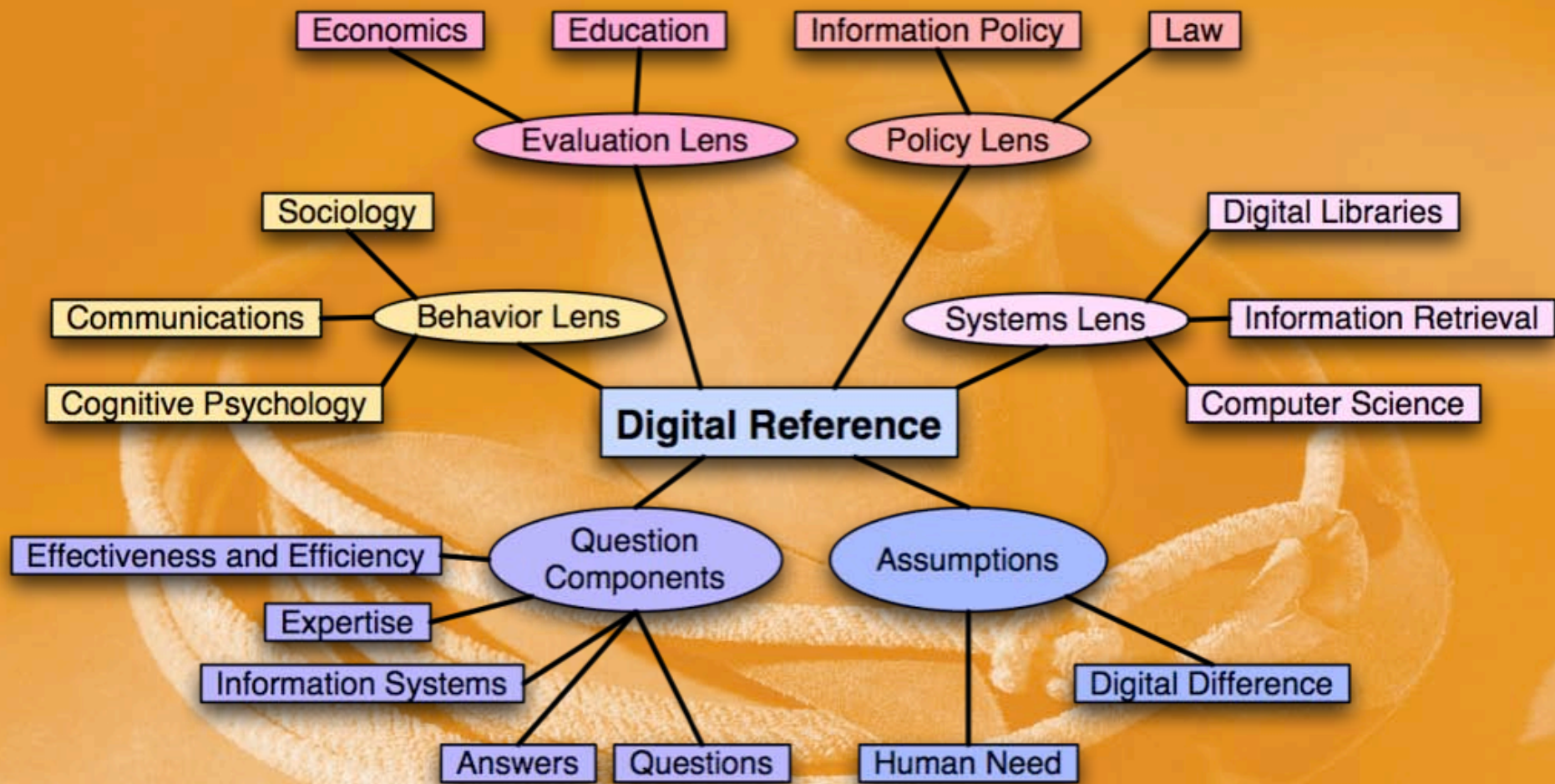
Definition & Question

- The use of human intermediation to answer questions in a digital environment

- How can human expertise be effectively and efficiently incorporated into information systems to answer user questions?
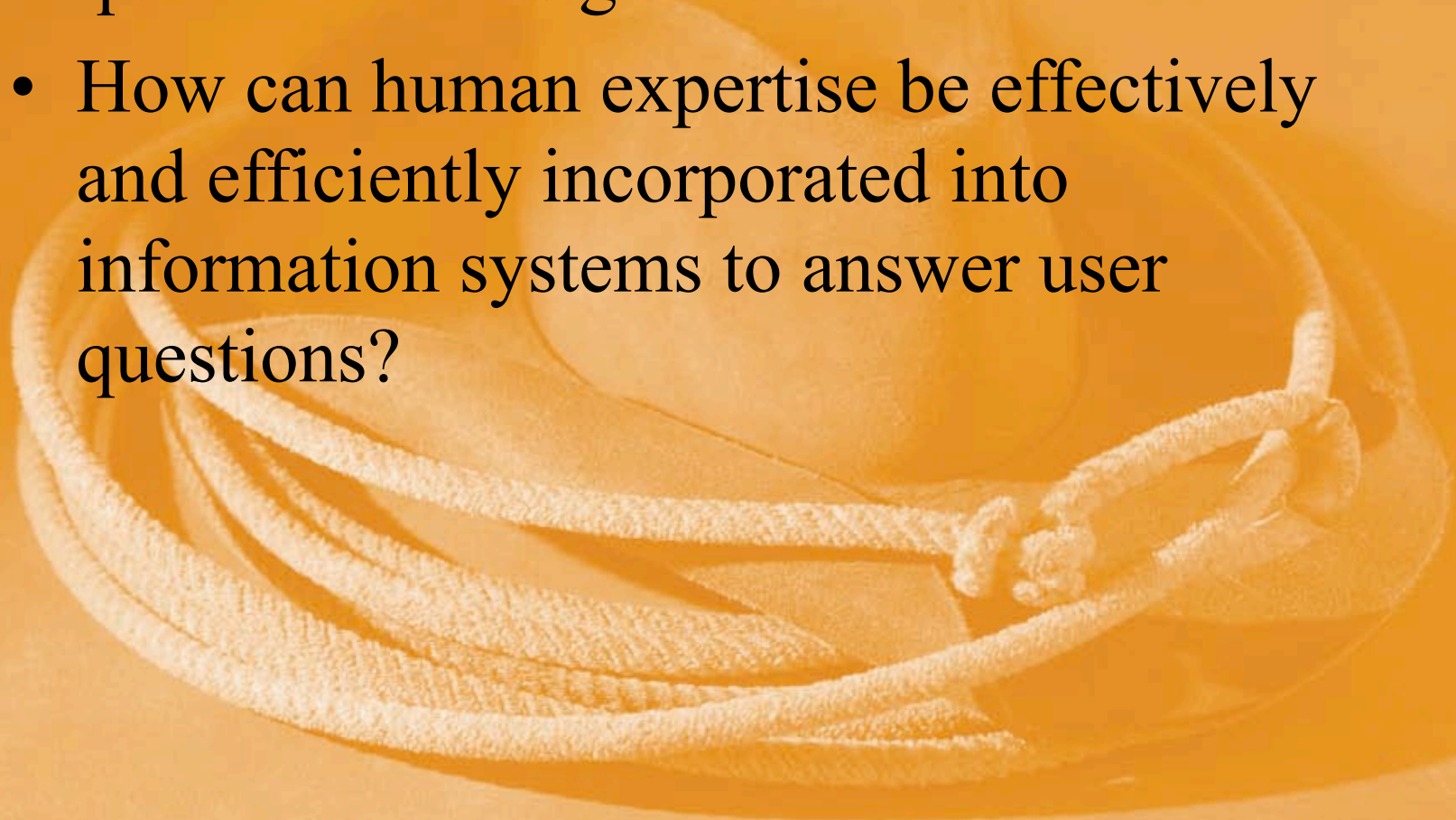
The Model

Question Components

Definition & Question

- The use of human intermediation to answer questions in a digital environment

- How can human expertise be effectively and efficiently incorporated into information systems to answer user questions?
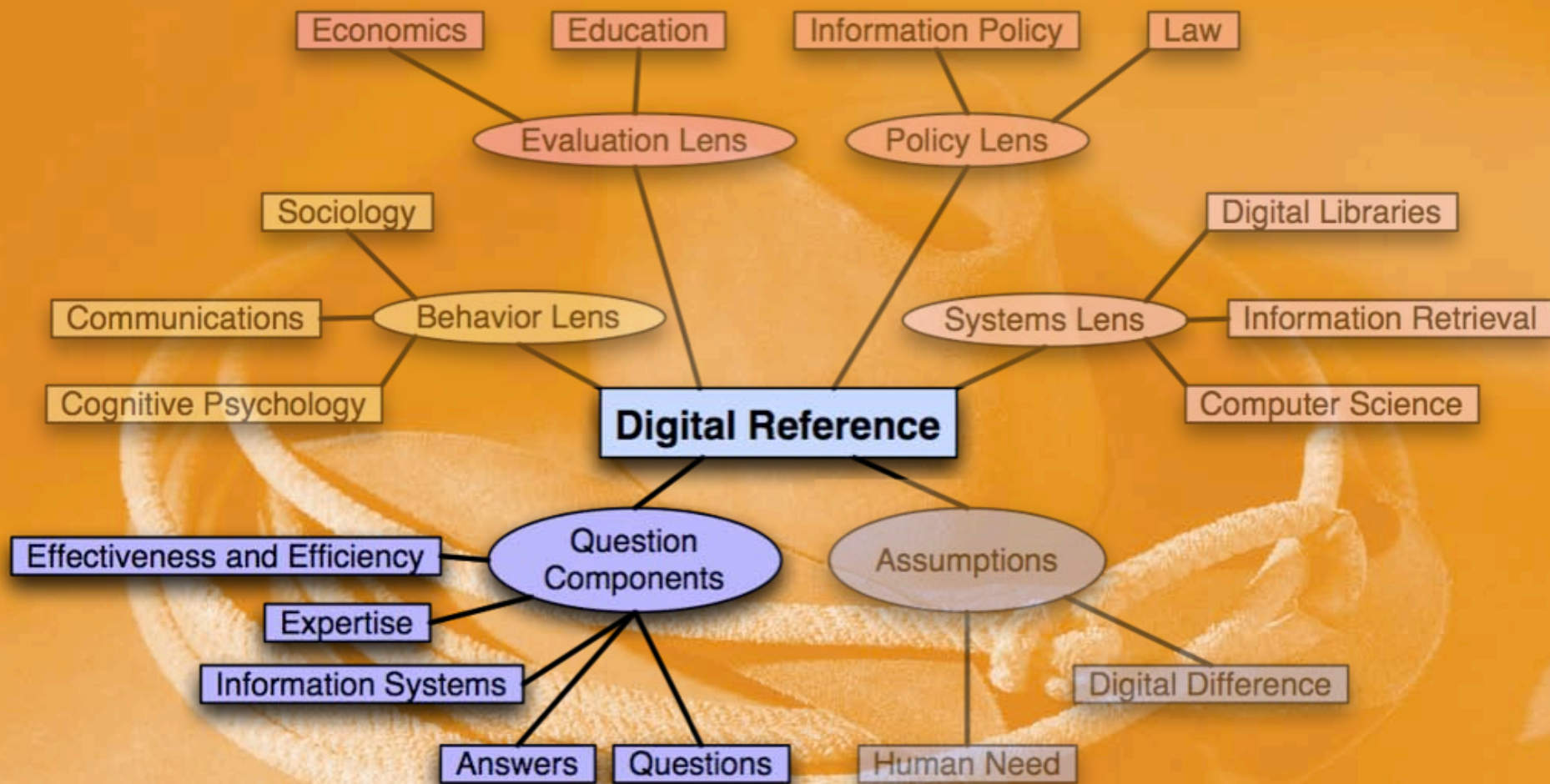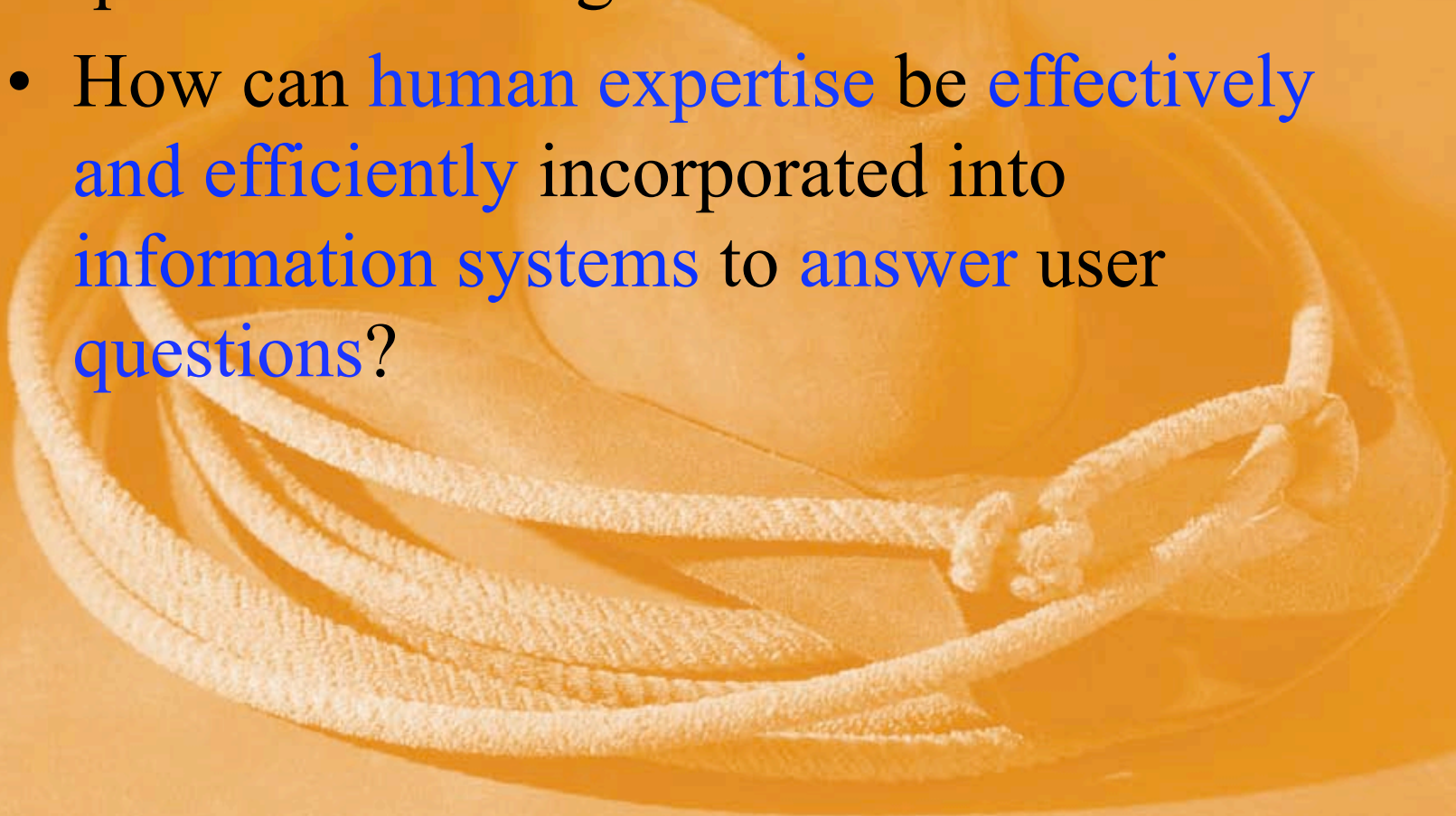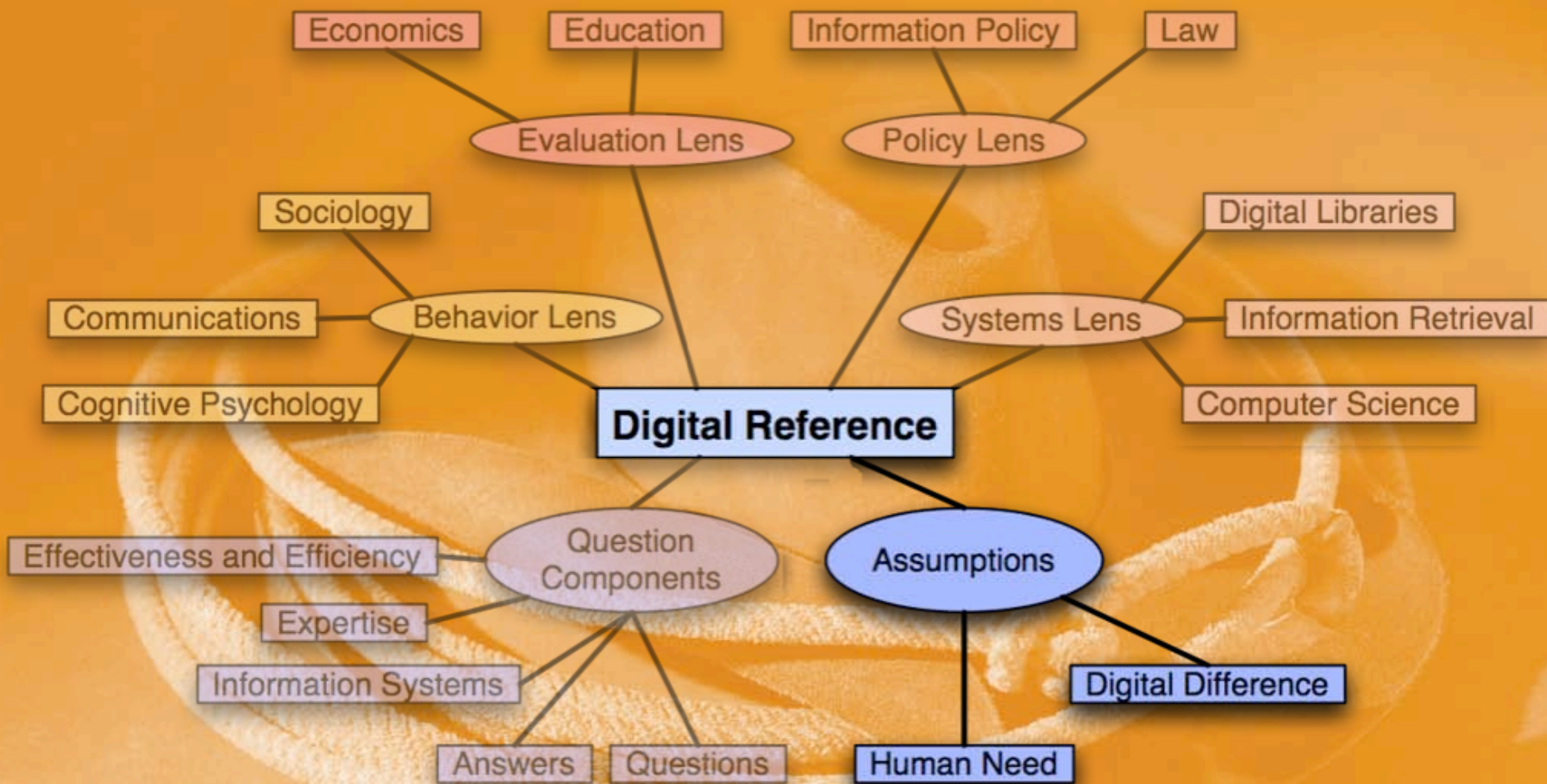
Assumptions
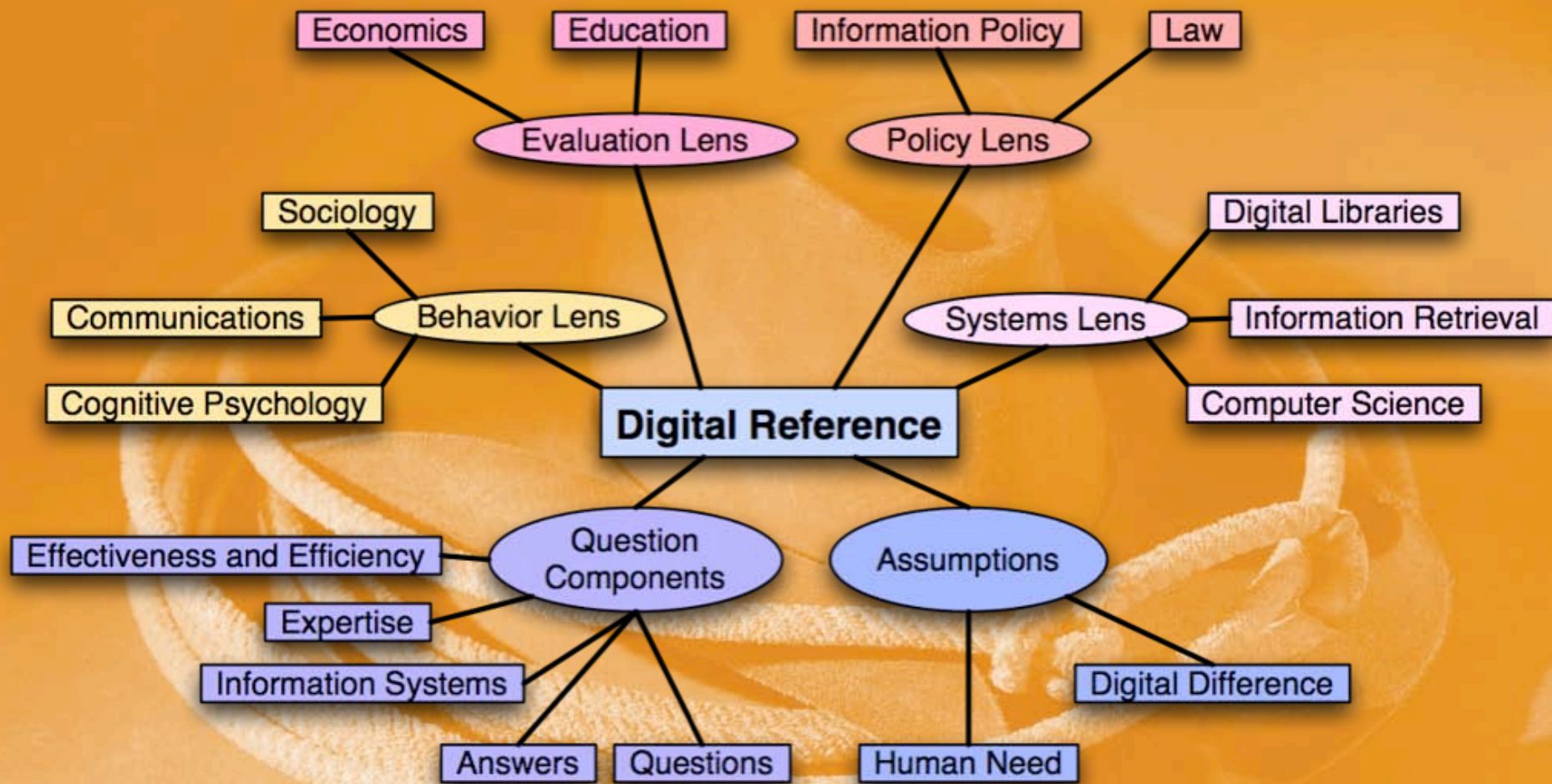
The Model
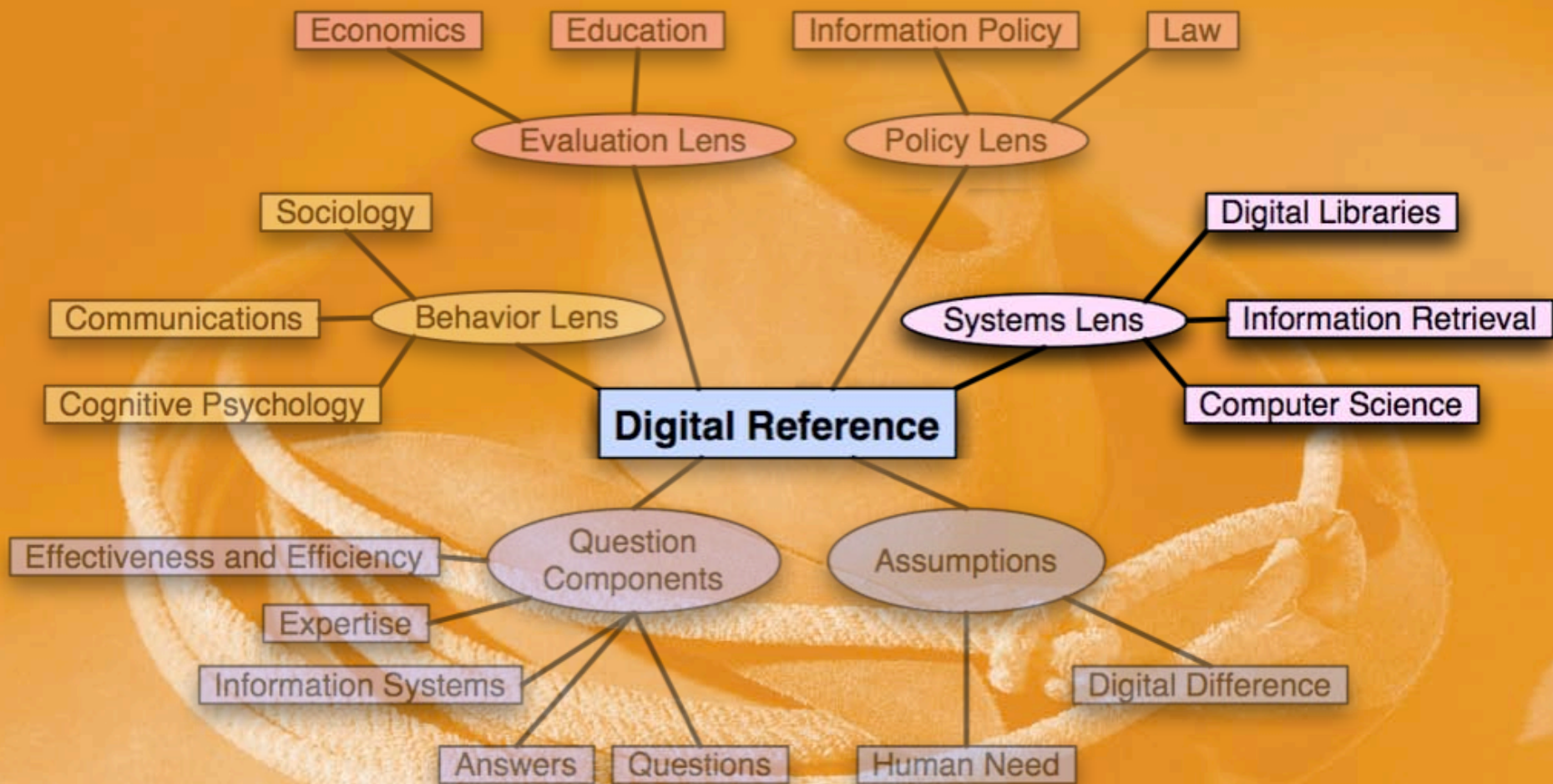
Systems

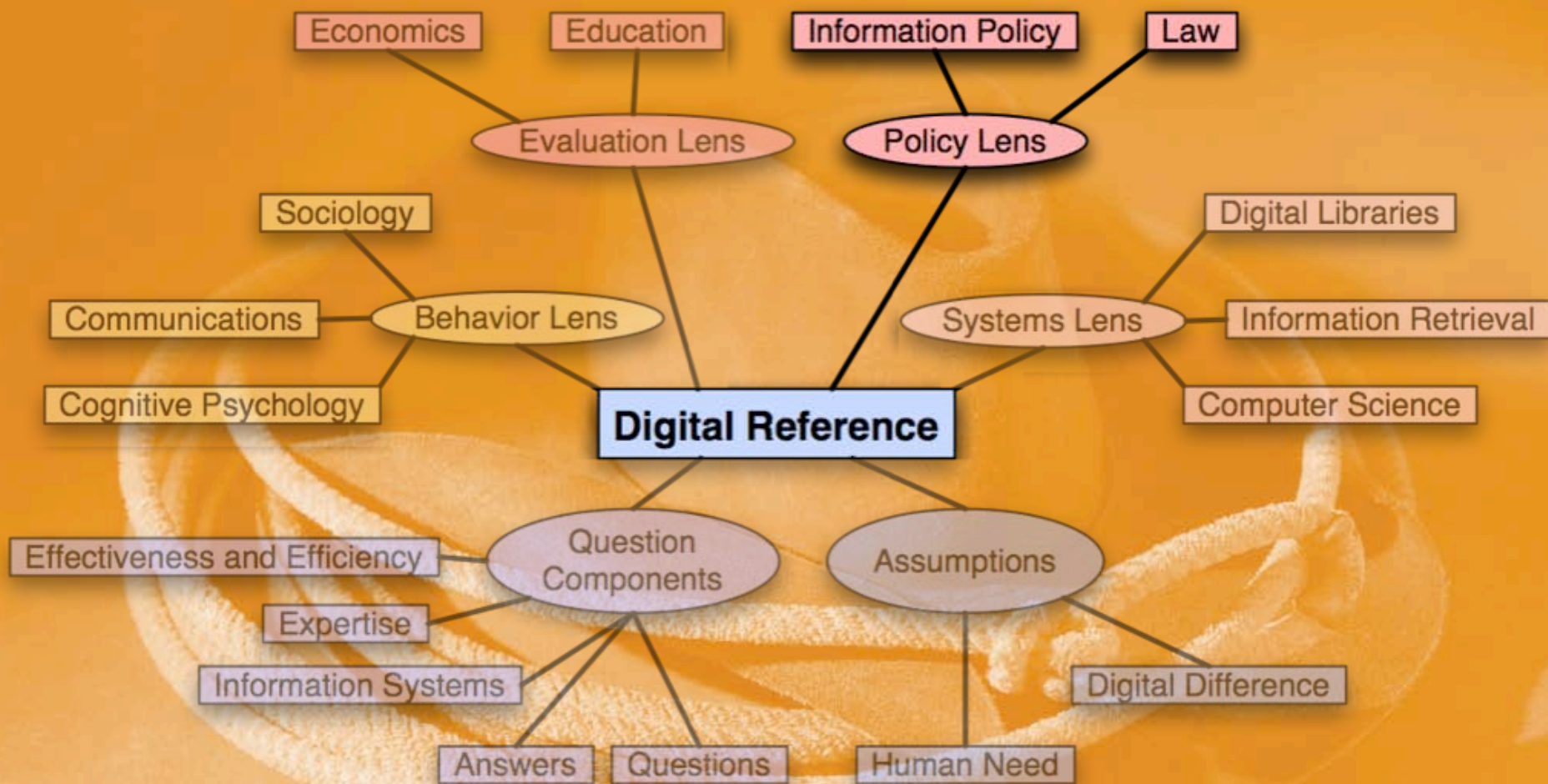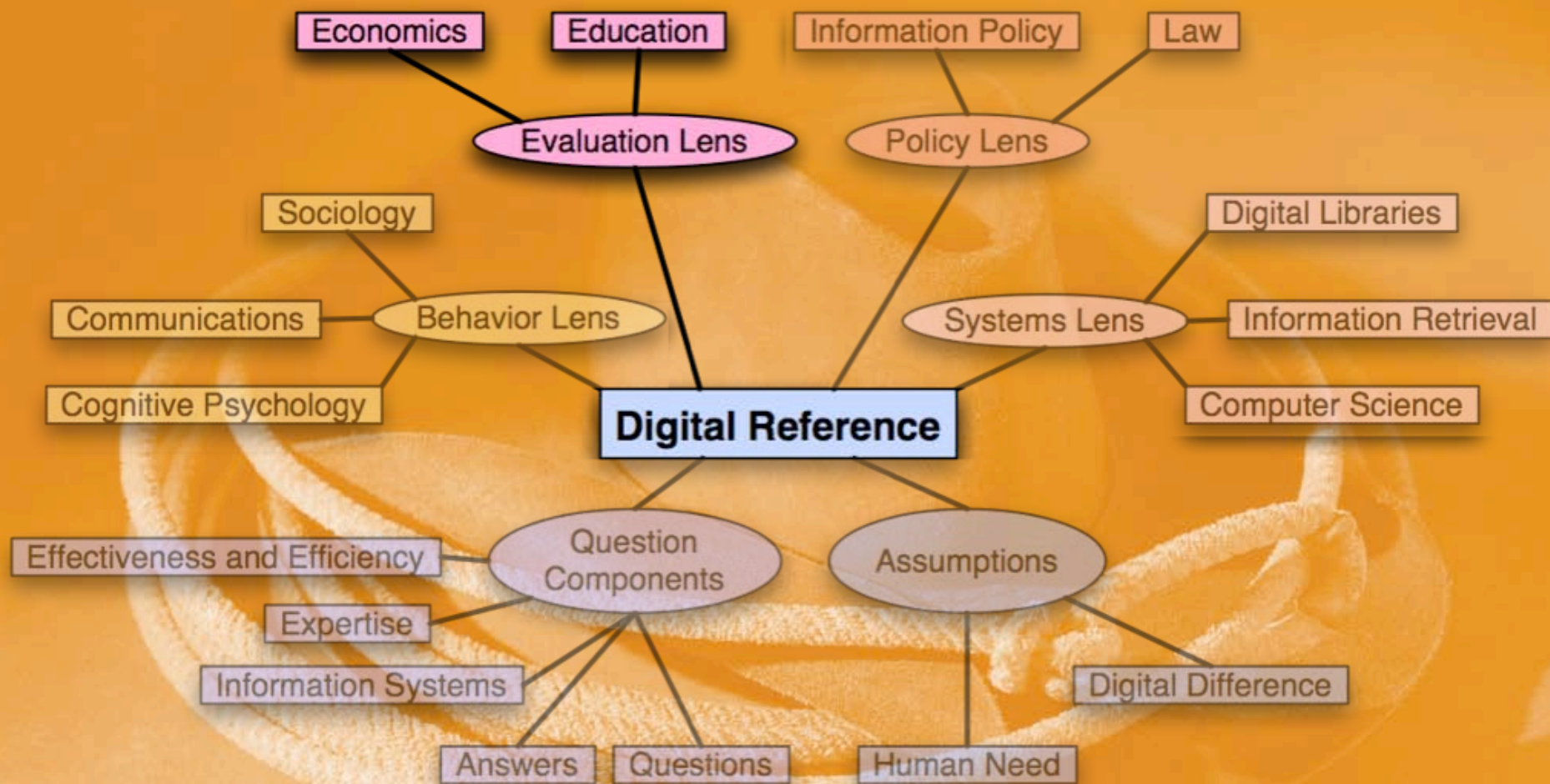# One System Model

Question Acquisition

Triage

Triage Center

Answer Formulation

Experts

User

Tracking

Resource Creation

Web Resources

Q&A Archive

Policy

Evaluation

Behavior

Research Matrix

	Policy	Systems	Evaluation	Behavior
Human Expertise	Needed Staff Level Expertise and Training	How is human output incorporated into systems components (such as a knowledge base)	What is the percieved benefits of human mediation (familiarity of human voice? content expertise? instruction?)	Do users ask questions differently when they know a human intermediary is involved?
Efficiency and Effectiveness	What limits should be placed on a service and how are they determined?	What level of automation can be used in digital refernce?	What metrics are needed to determine cost/value in digital reference	Does knowledge of cost in digital reference effect behavior?
Information Systems	How can digital reference systems be constructed to protect individual privacy, and licensing while achieving maximum benefit for an intended community?	What are the required components of a digital reference system?	What are appropriate performance metrics for system evaluation?	How do experts and users interact in a digital reference system?
Questions	How do services determine out of bound questions?	What systems work best as an interface to get at user questions?	Have questions qualitatively changed over time in digital reference (gotten harder)?	What digital aids can be used to aid users construct questions?
Answers	What policies do or should bind service responses (copyright)?	Can knowledge bases be better used to provide answers to some types of questions?	How do you determine "right" and "wrong" answers?	What are the necessary components of an answer needed to meet a user's information need?

Research Matrix

	Policy	Systems	Evaluation	Behavior
Human Expertise		Croft, et. al.	Silverstein	Janes, et. al.
Efficiency and Effectiveness	Abels	Nicholson	McClure et. al.	
Information Systems		Lankes, McClennen		
Questions		Pommerantz		Smith
Answers			White	Goodrum

Research Matrix

	Policy	Systems	Evaluation	Behavior
Human Expertise	Staffing Requirements	Specifications for Knowledge Bases	Better Feedback and Evaluations	Staffing and Marketing
Efficiency and Effectiveness	Service Level Policies	Greater Scale	Better Economic Evaluation	Marketing
Information Systems	Automated Policy Enforcement and Protection	Better Software Options	Benchmarking for Software	Better Interfaces
Questions	Consortia Specifications	Better Interfaces	Staffing and Budgeting	Better Websites
Answers	Consortia Rules	Greater Scale	Better Evaluation (55% Rule?)	Better Answers

Research and Practice

- Is Research Important to Practitioners
  - Research without Practice is Ineffective
    - Limited utility to academics
    - Impossible to truly verify results in a "professional" context
  - Practice without Research is Inefficient
    - Constant reinvention of practice
    - Lack of benchmarks and best practices
    - Lack of economies of scale
- Development Process was Model of Joint Practice/Research Development

Can't We All Just Get Along?

- One Use of the Agenda is to Cross Academic and Practice boundaries
  - Library Type, Division, Institutions, Etc.
- Digital Library-Empowerment
  - "Research" Focus versus "Library" Focus
  - "Old Style Librarians" Equivalent to "Ignore"
  - NO Digital Library without a Digital Librarian!

Questions?