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Information and Referral Services: A Brief History

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What is information and referral (I&R) service? The most widely accepted definition of I&R is “the active process of linking a person with a need or problem with a service which will meet the need or solve the problem.”¹ For example, this type of service would provide detailed information, including contact information, mailing address, telephone number, etc., about where a person could go to receive childhood immunizations. There are three basic requirements of an I&R service: creation of a resource file, distribution of the information, and updating the file.² I&R services were originally created to serve the disadvantaged members of underserved areas, but few actually served this population exclusively or even primarily.³

I&R is similar to the library’s reference service transaction. One element of an I&R service is finding information in anticipation of user needs. Another element is helping the user find information. The final element is advising the user. Librarians are trained to perform all of these elements; they perform them in reference services every day.⁴ Librarians have a number of characteristics that make them an ideal host for I&R services. As stated earlier, librarians are trained to find and organize information so users can access it. Libraries, through their location and hours of operation, are usually easier to use than other agencies. Members of a library’s staff are usually trained in a consistent manner, so getting the information is easier. Public libraries serve an entire community, which means that the “unserved” groups have access to the information. Libraries strive to be “neutral” organiza-

tions, so hopefully users will not feel any political, cultural, or ideological expressions implied in the materials. Finally, libraries generally have a large number of resources available that supplement the traditional I&R resource file.⁵

For these reasons, libraries “borrowed” the concept of I&R from the social service delivery systems.⁶ Another reason libraries are providing I&R service is to reach a larger part of the population.⁷ This would mean getting to the disadvantaged members of the underserved areas that I&R was originally created to help.

Few I&R services existed before 1900. After World War II as people moved into the cities, most either lacked the skills necessary to perform city jobs or the knowledge essential for survival in the city, or were poor. These people also faced another problem: their inability to find needed information. These problems demonstrated the need for I&R services. Such services began to grow, but they were not I&R specific. The majority of these services was normally a result of another service and concentrated on a specific group or subject, which left a larger group and numerous subjects uncovered. Because of the lack of full subject and group coverage, I&R services were unfamiliar to the general public. These issues led people to consider that public libraries should provide I&R services.⁸

In 1968, the Enoch Pratt Free Library and the University of Maryland’s library school, both in Baltimore, began researching the possibility of

¹ Robert Croneberger, Jr. and Carolyn Luck, “Defining Information and Referral Service,” *Library Journal* 100 (November 1, 1975): 1985.

² L.B. Woods and Jon Walker, “Automation of Community Information Referral Services,” *Information Technology and Libraries* 8 (December 1989): pp.393.

³ *Advances in Librarianship*, ed. Wesley Simonton (New York: Academic Press, Inc., 1984), 112-115.

⁴ *Ibid.*, 110-112

⁵ Thomas Childers, “The Neighborhood Information Center Project,” *The Library Quarterly* 46 (July 1976): 273.

⁶ *Advances*, 110

⁷ Douglas L. Zweizig, “With Our Eye on the User: Needed Research for Information and Referral in the Public Library,” *Drexel Library Quarterly* 12 no. 1/2 (1976): 49.

⁸ Thomas Childers, *Information and Referral: Public Libraries* (Norwood, NJ: Ablex Publishing Company, 1984), 2-5.

providing I&R services. In 1970, the research became reality when the Public Information Center opened. Unfortunately, the project failed and closed four years later. The project failed for a number of reasons. For instance, some of the services were not prominently placed in the library; they were not offered along side regular reference services and information activities; there was inadequate staffing; and the users had to visit the physical library.⁹ The Detroit Public Library began its I&R service in 1970 called The Information Place (TIP) service. The library administrators attempted this service in response to funding problems. They anticipated that providing this service would bring the library more community attention, which would increase the library's impact on the community and funding. Detroit learned from the mistakes made by Enoch Pratt. For instance, the Detroit library staff was trained to collect and provide better information; they incorporated these services into the other services; and publicized the service. After three years, the service was working and growing, and became the model for other libraries to follow.¹⁰

Also in 1971, the University of Illinois held a conference on this type of service. The "is I&R library work or social work?" conference was the first formal and nationwide meeting dealing with this topic.¹¹ Although the question was not answered, the I&R movement grew.¹²

The next major step in I&R services occurred between 1972 and 1975. During these years, the Office of Libraries and Learning Resources and the U.S. Office of Education funded a huge I&R service project. Five public libraries from large cities participated in the project, called the Neighborhood Information Centers Project. As a direct result of this project, the number of libraries providing an I&R service steadily grew. In 1977, 296 libraries reporting that they were involved in some sort of I&R service.¹³

Despite the growth of I&R services, there are a number of problems associated with libraries providing I&R services. Librarians are trained to

isolate a user's need and then provide the most appropriate resource. With I&R, most users are looking for general information about a service that can solve a particular problem or need. The mission of a library can also clash with an I&R service. Most libraries' mission emphasizes collecting and providing access to documents, print or electronic, and answering reference questions. An I&R service requires an addition to that mission since answers to questions are obtained using a resource file, containing information about agencies, organizations, etc. in the community that provide services and their contact information, instead of materials libraries hold in their collections. Another problem is that the librarians are removed from the agencies, organizations, etc., that provide services detailed in the I&R resource file, which could lead to erroneous information if the file is not regularly updated.¹⁴

Another example of problems with librarians providing I&R is the philosophical attitude of the profession. Most librarians are trained and are more comfortable using bibliographic tools and techniques to find the information. The driving attitude, "I am only as good as my sources," tends to make librarians promote books or electronic resources as the sources of information rather than themselves.¹⁵ Librarians should try to break free from this attitude. They should promote themselves as the best source of information. Other problems with I&R services often occur because of bad planning, for example, lack of proper training, lack of standards for the I&R resource file, lack of criteria for staffing configurations and qualifications, lack of understanding the difference between coordinated and cooperative I&R services, and poor funding.¹⁶

Libraries that are going to offer I&R services must first determine what they can do to assist their users. Investigating the community to determine what information services exist usually is the first step. Librarians must check their findings against what they already offer in the collec-

⁹ Ibid., 2-5

¹⁰ Ibid., 2-5

¹¹ Ibid., 5

¹² Ibid., 2-5

¹³ Ibid., 2-5

¹⁴ National Commission on Libraries and Information Science, *Final Report to the National Commission on Libraries and Information Science from the Community Information and Referral Services Task Force*. (Washington, 1983), 17-18.

¹⁵ *Reference and Information Services: A Reader*, ed. Bill Katz and Andrea Tarr (Metuchen, NJ: Scarecrow Press, Inc., 1978), 180.

¹⁶ American Library Association, *The ALA Yearbook of Library and Information Services*. (Chicago, 1986), 170.

tion. The final step is to determine how to provide access to this information. In performing these steps, librarians must keep their community and users in mind. The service provided must be considered the best way to serve the whole community.¹⁷ Another consideration librarians need to address is the additional requirements they must undertake. Reference librarians, in most libraries, had two prime responsibilities: collection development and instruction/reference work. With the implementation of an I&R service, reference librarians began doing all of the requirements of library work including acquisitions, cataloging, and maintaining files and/or records.¹⁸ The reference librarians would need to make sure the agencies listed in the files were still active, update the contact information if needed, and remove any agencies that were no longer active.

I&R services have several component services. These components are usually present in the “linking” process. It is important to remember that each component is not mutually exclusive. The components include a resource file, the question/answer element, a clarification aspect, follow-up, assessment, advocacy, feedback, and assistance.¹⁹

A resource file, which is a directory or listing of agencies, organizations, services, etc. outside the library offering some service to the community, must be created and provided to the public. The file can be in any format, printed document, index card, microform lists, computer files, loose-leaf notebooks, etc.²⁰

The question/answer component can occur in three different ways. The “simple-information giving,” which occurs when a user asks a direct question and the librarian provides the information about a service outside the library. The “simple referral,” occurs when the librarian refers or directs the user to an appropriate resource. The “complex referral” occurs when the librarian contacts the service provider directly for the user.²¹

The “clarifying the need” component is what occurs when the librarian tries to determine if there are needs other than those expressed directly. Librarians should perform the “follow-up” component to ensure the user has received the appropriate resource and help they need.²²

Librarians can often complete the “advising – resources” component by providing an assessment of the outside resource. The “advocacy” component may be performed if the user has problems getting assistance from an outside agency. A librarian may want to perform the “reporting” component, which means providing feedback about the agencies. Finally, a librarian may complete the “arranging for related services” component to assist the user in following through with the information. This assistance could involve providing transportation to the agency, providing a place for the user to meet with the service provider, etc.²³

Librarians must be very careful when informing a user about a service provider. They must treat the information in the resources file as they would materials in the collection. Librarians should not rate the service or remove the agency from the resource file if the agencies are not performing to the user’s or librarian’s satisfaction. This may cause the resource file to be slanted or otherwise incomplete. In addition, users should also be given more than one service provider when possible. This should be done in order for the user to make up his or her mind who to use to ensure that the library is not promoting one provider over another.²⁴

As with other aspects of the library’s services, such as circulation and cataloging, I&R can use computers to facilitate use.²⁵ It is much easier to organize the information, make that information accessible, and especially update the information using computers.²⁶ Libraries began using computers for I&R services in 1985 and this use has led to specific formats for sharing the data.²⁷ If a

¹⁷ *Encyclopedia of Library and Information Science* (New York, NY: Marcel Dekker, Inc., 1978), 24:314.

¹⁸ *Reference*, 180

¹⁹ National Commission, 6-7

²⁰ *Ibid.*, 6-7

²¹ *Ibid.*, 6-7

²² *Ibid.*, 6-7

²³ *Ibid.*, 6-7

²⁴ Croneberger, 1986-1987

²⁵ Sarah Jaquay, “Avoiding Obsolescence,” *Public Libraries* 35 (January/February 1996): 29.

²⁶ Woods, 394

²⁷ ALA Yearbook, 171

library has more than one branch that uses a resource file or makes the file accessible to the public, individuals entering the information should be using the same formats in order to ensure the information is reachable in the same manner by all interested parties. The computerization of I&R services has had a significant impact. Also, computers will increase the quality and service of I&R in the future.²⁸ As formatting standards become mainstream, individuals will be able to obtain the information they need from one library's resource file just as easily as they can from another library's resource file. In addition, as more libraries move this type of service online, individuals can use the files no matter where they are located, what time of the day it is, or if the library happens to be closed.

Most libraries have incorporated I&R into their normal library services, specifically reference services. The success of the Detroit Public Library's TIP service, which incorporated their I&R service into existing services instead of having it stand alone, and the failure of the Enoch Pratt Free Library's I&R service illustrate that incorporation is essential for an I&R service to succeed.²⁹ The incorporation of an I&R service into current services would also explain the lack of recent literature relating to I&R. A current trend in providing I&R services is the creation of community networked services. Community networks or community information systems use computers to establish an electronic method for sharing information. These networks require collaborative efforts between librarian, other service providers, and the citizens of the community.³⁰ There are several potential difficulties involved in a community network. One is learning how to collaborate effectively with all parties. Since collaboration is essential in providing quality content and services, this obstacle must be resolved.³¹

²⁸ Woods, 394

²⁹ Childers, 2-5

³⁰ Joan C. Durrance and Karen G. Schneider, "Public Library Community Information Activities: Precursors of Community Networking Partnerships [online]" Paper presented at the Community Networking in Taos, New Mexico in May 1996 [cited 14 December 2004]. Available from World Wide Web: <http://www.si.umich.edu/Community/taospaper.html>

³¹ Ann P. Bishop, Imani Bazzell, Cynthia Smith, and Bharat Mehra. "Community-Based Creation of Networked Information Services: Developing Tools and Guidelines for Public Libraries [online]." The Afya Project, 1998 [cited 14 December 2004]. Available from World Wide Web: <http://virtual.parkland.edu/gds/114/afya/>.

Businesses and non-profit organizations in Westchester County, New York, have undertaken the development of this type of I&R service and have created FIRST (Family Information and Referral Service Teams). During the process of creating this service, the businesses and non-profit organizations realized they had much in common. They also realized that they had similar goals and problems. They discovered that one party could solve the problems of the other. This collaboration worked so well that the groups are attempting to establish a nationwide information and referrals telephone number, 2-1-1.³² According to the 2-1-1 site, "2-1-1 serves approximately 119 million Americans - over 40% of the US population 156 active 2-1-1 systems covering all or part of 31 states plus Washington, DC."³³

In order for librarians to create successful services and programs, they must be periodically evaluated. I&R services are no different. I&R services must be evaluated to assess effectiveness. This ensures the integrity and quality of the information provided. The services must also be evaluated to ensure they are reaching the individuals who need the information. Evaluation can also demonstrate where or how services can be improved or widened to reach more people.

With all the importance placed on evaluating services, there should be a standard process in place for I&R. However, no process currently exists to evaluate I&R services. Most I&R service evaluations are subjective, for instance, most librarians agree that the best measure of a service is if the public uses it and finds it helpful.³⁴ Measuring the effectiveness of a library's I&R service can include counting the number of users that have used the service, the number of service contacts in the resource file, if the resource file is up-to-date, and how often the file is actually updated. Librarians can also use other categories or elements to measure the effectiveness of their services.³⁵

³² Bob Cole and Sue Cole, "Business, Non-Profits Discover Each Other." *Westchester County Business Journal* 39 (05/08/2000): 4.

³³ United Way of Connecticut, 2-1-1. <<http://www.211.org/>> (13 June 2005).

³⁴ *Public Library Information and Referral Service*, ed. Clara S. Jones (Syracuse, NY: Gaylord Professional Publications, 1978), 154-155.

³⁵ Zweizig, 54

Creating a standard process for evaluating I&R services is essential. Standards would ensure equality in assessment and that the individuals would receive accurate and current information. Users must remain the focus of the service.

It is also important to note that even with the emergence of the Internet, I&R services are still extremely important. There is still a technological divide. For instance, some people do not have readily available access to computers or the experience to use technology effectively. In addition, this type of service is needed by groups with special needs, such as recent immigrants or non-English speaking individuals. For some in the underserved areas of communities, this service is the only method they have for obtaining needed information.

It is apparent that information and referral services are extremely important. These services provide an important resource to communities. Since libraries are in the business of providing resources and services to their communities, I&R will remain an important part of public libraries. The resources provided through I&R services can reach individuals that would not normally use the

library. By reaching out to these underserved populations, libraries will also be improving their image, which could be beneficial to libraries during budget discussions. Whether libraries use an automated I&R service or rely on printed formats, patrons will find this resource extremely useful and necessary.

The growing popularity of Google and Yahoo illustrates how easy it is to find information. Unfortunately, this information is not always accurate. In addition, there are areas of the population that do not have access to or the knowledge to use technology to find their information. Since the main goal for libraries is to help people find accurate information, our importance should be more apparent. Regrettably, some people do not consider libraries as a source for the type of information provided by an information and referral service. I&R services are essential in order to bring communities together and to help the people in a community to obtain solutions to their needs and/or problems. By collaborating with outside agencies, libraries will unite individuals and organizations in a common goal and increase the public's image of libraries as well.

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