

## ONLINE IN REAL-TIME?: DECIDING WHETHER TO OFFER A REAL-TIME VIRTUAL REFERENCE SERVICE

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### Abstract

There has been a great deal of interest recently, notably in the United States, in the concept of virtual reference services. Of particular interest is the use of software that allows a "chat" session between librarian and patron. While many Libraries in Australia and New Zealand already offer online reference services via email or a web form, as yet very few have ventured into the world of online reference services in real time.

During the summer of 2001-2002 a pilot group at the University of Canterbury was formed to investigate whether our Library should offer such a service in 2002. This paper will briefly describe the service which went live in April 2002, including our reasons for offering it, the process of implementation and preliminary results. It will then outline and discuss in detail some of the issues that have arisen out of the service with comments and recommendations from our experience.

### ONLINE HELP

On April 22nd 2002 the University of Canterbury Library began a trial of a live virtual reference service using internet chat sessions. We called this service "*Online Help*".

### Rationale

The Library identified a need to be more available to answer students' questions in real time, via the Internet, *when* and *where* they need assistance.

- There is evidence, both anecdotal and recorded, that increasing numbers of people are turning to the Internet as their preferred source of information, and that this is being reflected in library reference desk statistics. [1-7]. For example our Central Library Help Desk enquiries peaked at 35185 in 1999, dropping to 32241 in 2000 and 33414 in 2001.
- We wanted to make it possible for our users to ask for help anonymously and without having to approach a reference desk.
- Users accessing the Internet or databases from home via a telephone connection need to be able to ask for help without disconnecting from the Internet. While the use of cell phones is becoming more widespread, costs of this type of call are still very expensive.
- We wanted to allow our users to access Library help without having to lose their seat at a laboratory computer or database session.
- Many students are becoming familiar with the "chat" environment on the Internet.

Online information request forms on the web and email contacts already enabled students to ask questions from their computers, but did not provide the immediacy of reply, or allow reference interview techniques to be employed easily.

### **Objectives**

To provide a system that:

- allowed our users to contact us, online and in real-time
- was web based, system independent, and allowed for good computer security.
- did not require users to download any software to their computer
- allowed enquirers to remain anonymous if they so desired
- fitted in with staff workflows and practices

### **Summary of the process**

It took 17 months from when the idea was first presented and discussed at a Public Services Committee meeting in November 2000 to when *Online Help* first went live. This process included:

- Learning about virtual reference from the literature
- Presenting the idea to staff within the Library who would be required to help run such a service.
- Gaining approval in principle from Library Management Council
- Assigning a staff member to lead the project
- Finding suitable software. We took advantage of “RAKIM”, which is open source software made available by Miami University, Oxford, Ohio (<http://www.lib.muohio.edu/>). We are very grateful to Miami University for their generosity in making this software available (<http://styro.lib.muohio.edu/rakim/>)
- Trialling, testing, customising (with considerable input from our Systems Department) and documenting the software
- Writing policy documents and training manuals
- Preparing new web pages, and identifying web pages from which to link the service
- Finding a name and creating a branding icon
- Identifying and training staff
- Running an in-house trial, and trialling the service with selected students
- Deciding on hours of availability. We ran the test with 15 hours per week, Monday- Friday 2pm-5pm
- Advertising the service.

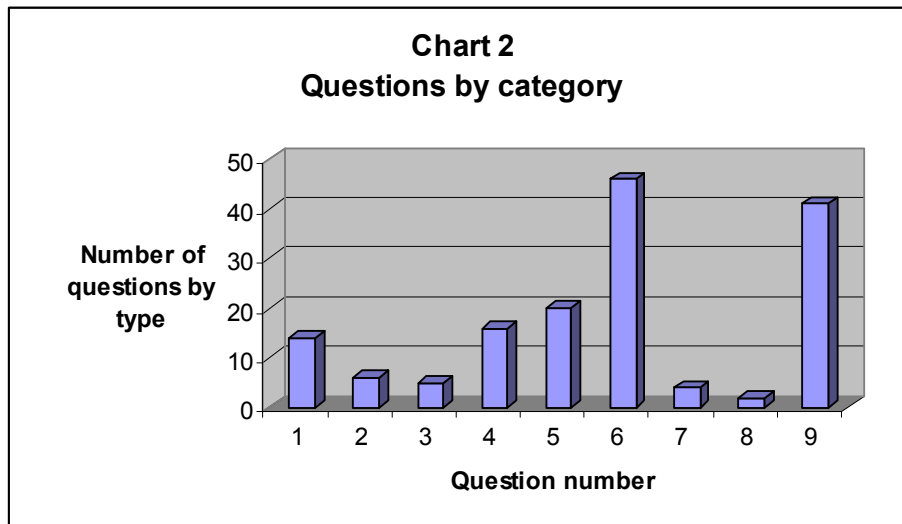
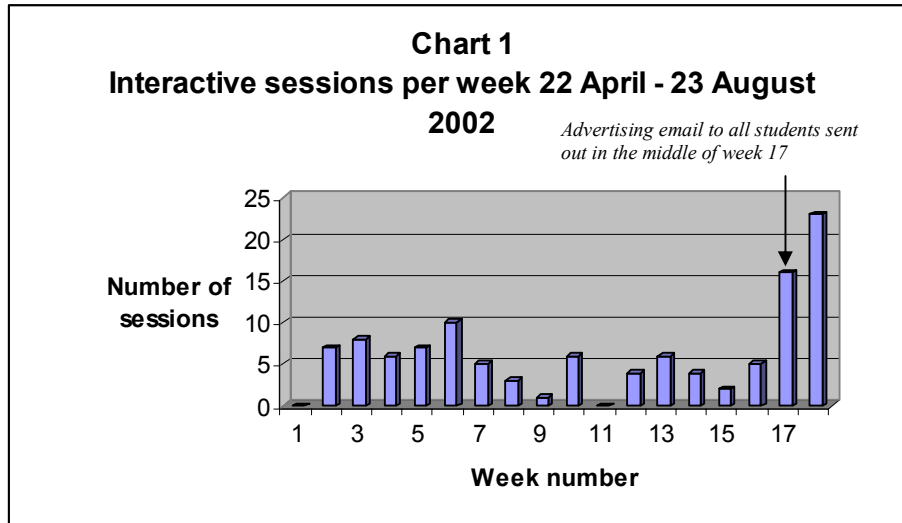
### **Results – statistics to date**

Uptake was slow. It was a week before we had any enquiries, and since then the number of enquiries has been steady but small. This reflects the experience of other libraries as reported in the literature. [8-11]

In the first 18 weeks of our service, (8 weeks of Term 2, 4 weeks of term break and 6 weeks of Term 3) we recorded 154 logins, of which 41 did not respond to the librarian’s offer of assistance. 113 logins included a question or comment, which is an average of just over 1.25 interactive sessions per day the service was available. These enquiries covered a wide range of topics, and were very similar in spread to those received at a physical desk.

We agree with the Ready for Reference report[12] comment:

“Live web-based reference is a very new type of service, and [we] ... believe that it takes longer than one academic semester for it to catch on, and that use will increase.”



1. Subject query –usually referred to web page
2. Just curious about new service
3. University IT/photocopy/computer accounts
4. Library online catalogue (PAC)
5. Databases/Online access
6. Library services/resources
7. About University of Canterbury
8. EndNote
9. Logged in, but no question

Certainly those users who have made use of the service are generally enthusiastic.

Comments have included:

“cool, this is a great service”

“this is a great idea by the way!”

“Isn't this interface great!”

“I think this kind of service is very good.. keep it up.....^^”

“thanks heaps! this thing is mint!”

### **Librarians' experience**

Offering a reference service online is a completely new and surprisingly challenging experience. Even experienced reference librarians found themselves nervous during the first few sessions. The total lack of any visual or audio clues about the person you are dealing with makes it difficult to set the “tone” of your responses, and it is also difficult to think quickly and type a coherent answer. The user has no visual clues either about what the librarian is doing, so there is a heightened sense of time pressure. It is difficult to convey to users that there may be several stages to the answer, meaning that they often disappear after the first suggestion. It can be tempting to suggest that a visit to the Library is the best option, but if users ask a question using chat it is likely that they would prefer to be answered through this medium if this is at all possible. Also, it is not always obvious to other users and staff that you are busy with a client and not just “typing into the computer”.

### **The Process Of Initiating A Virtual Reference Service**

There are already some excellent resources available in the literature outlining important issues to be considered in the process of initiating a virtual reference service. Articles by Sloan and Weissman [13, 14] give useful guidelines, and Foley, Helman, and Kibbee [8, 9, 15] are among articles which describe particular implementations worthy of consideration. Books are also being published on the subject [16-18] so there is plenty of assistance available.

We would give two pieces of advice from our experience. Firstly, do not underestimate the amount of work involved in setting up a service. Policy decisions, software selection and trials, staff allocation and training, creating web pages, and advertising is time consuming. It is probably advisable to put someone in to manage the process, giving that person plenty of time to work on it, and you are likely to need assistance from your Systems staff. Secondly ensure that you get your library staff behind the venture, particularly management, but also the front line staff.

## **THE ISSUES**

### **How can we consider adding a new service when we are already too busy?**

One of the most common concerns expressed when a virtual reference service was first suggested at the University of Canterbury, was how can we add in a new service when we are already struggling to maintain existing services?

In a recent survey by OCLC

“seven-in-ten students say they would use online help to find exactly the information they need for their study assignments” [7]

In fact, can we afford to wait?

“If people are migrating to the web, change is necessary. I’m concerned that if we wait too long, we’re abdicating” said LC’s [Diane] Kresh.” [19]

### **Is there a critical mass for efficiency?**

While many Librarians are very excited about the concept of real-time virtual reference services, as already noted, uptake from users has not been overwhelming.

In view of the fact that response is *under* rather than *overwhelming* it could be that critical mass could be a major consideration in the New Zealand environment. Our institutions are small by international scale, for example there are about 12,500 students at Canterbury, compared to 25,000 at the University of Buffalo[8], or 22,000 at Auburn University and the University of Waterloo[10, 11]. One staff person keeping a live chat session open is available whether the potential user base is 10,000 or 25,000. If uptake increases and there are “queues” for digital reference services, numbers of staff will need to increase proportionally, but while a new user base is being built up, it is relatively more demanding of staff time in smaller institutions.

### **What about 24 hours a day, 7 days (24/7) availability?**

Much has been discussed about the need for 24/7 services, especially in the online environment [4, 20-22]. The scenario of the person with the full time job, who settles down for a couple of hours study after getting the family meal and the kids to bed is one that is very indicative of the need for after-hours reference services. Online services can be offered anywhere too – from the Library, from people rostered on at home, or from other libraries in a different time zone. As more and more information and resources are available electronically can we continue to limit reference services to library opening hours? However, the \$64,000 question is whether the demand will justify the resources needed. Bernie Sloan’s report on the 24/7 Ready for Reference Project, suggests a re-evaluation of the goal to offer 24/7 services.[23] Richard Doughty [22] makes the interesting comment that

“the matter of *availability* is much less important than our *capability* to offer virtual reference services in real time”.

We think this is a valid comment, as we must have the ability to offer a virtual reference service before we look to expand into the 24 hours a day, 7 days a week service.

### **Co-operative/consortia arrangements**

One way to enable 24/7 reference services would be for libraries in different time zones to co-operate and answer queries from each other’s client base. Ryerson University Library in Toronto, Canada reported [20]that it was actively seeking partnerships with Australian university libraries for this purpose, and in 2000 Roy Tennant questioned why a student in Berkeley at 11.30pm couldn’t “initiate an online conversation with a librarian in Perth” [4]. The idea of inter-institutional co-operation does rely on

“Anecdotal evidence [that] suggests that academic reference librarians with a good knowledge of a range of international databases and other Web-based resources would feel right at home slipping into the reference desk of other university libraries, particularly where there is a good institutional “fit”. ”[20].

We are not convinced by this argument. Our analysis of questions asked in the first 18 weeks of our virtual reference service found that the majority were specific to our library

and university (see chart 2) and this reflects the experience of other implementations. [10, 15] Breeding [24] says

“One of the key issues associated with the cooperative approach is whether the questions posed by remote users are general enough that they can be answered by a reference librarian from another library, or if they require the expertise of local librarians.”

We believe that a successful co-operative partnership would require not only very careful selection of a partner ensuring a good institutional “fit”, but also for staff to have a very detailed knowledge of both sites’ policies, web pages, databases and subject specialists. Co-operative training would be necessary, as would comprehensive and thorough methods of ensuring information about changes were communicated to all staff involved at both institutions. This is a major challenge within one institution, which would be much greater when more than one institution was involved and is a major hurdle for anyone contemplating an international collaborative service.

### **Staffing and training**

We began our service using only staff who were interested and committed to the concept of virtual reference. They were also all staff who had reference desk experience so we were able to make a number of assumptions during the training process; for example that they understood the concept of the reference interview, and that they had a good knowledge of public service policies and practices.

Our aim was always to include more than just public service staff however, and this was one of the aspects of virtual reference that appealed to management. They liked the idea that any staff person could work on Online Help at their desktop, continuing with their own work if there were no enquiries. It has definitely been worth the extra training required to get the increased knowledge and experience that these people have brought with them, but the extra training needs did need consideration.

Another training issue is related to the fact that we have one virtual reference service for all the campus libraries. Physical reference desks are sited in each campus library and while staff at any desk will always have to answer questions across all subject disciplines, in practice most questions asked at any desk relate to the disciplines covered within the home library, and staff are probably most familiar and comfortable with these. Questions asked online won’t be pre-sorted by discipline, and because a question is asked online there is some pressure to either give the answer online, or to refer to a specific subject specialist rather than a reference desk in another library. Transaction logs have indicated that our staff would benefit from more training in different subject areas, even if only to the extent that they are more conversant with exactly what other disciplines campus libraries cover, and precisely who to refer questions to. This is surely something that is desirable anyway for reference desk staff, but has become particularly important in the online environment. In a way our location situation represents a small version of international/consortial/collaborative arrangements. The training issues we have encountered would be magnified greatly when attempting to provide service for library users across the other side of the world.

### **Advertising**

Many reports also comment that response is directly related to advertising efforts and this has also been our experience. Sloan[25] comments that:

“A system will not be effective until a critical mass of possible users is aware of the potential benefits of the service”

Our best forms of advertising have been an article in the University of Canterbury student magazine *Canta*, [26] and a direct email advertisement to all students. The article was written by a student, totally from a student's point of view and was very complimentary about Online Help and the Library's electronic resources. The day after this article appeared we had the most number of logins (although not all became enquiries) in one day to that date, and numbers of enquiries stayed relatively high for a couple of weeks after.

Other forms of advertising have included:

- the prominent placing of the Online Help logo on web pages
- posters placed in all libraries, in some student hostels, and in a number of other service points in the University
- mini bookmark flyers distributed within the libraries
- a prominent article in the Library publication *Library News*
- an email to all students
- A few subject librarians also sent out an email to their student groups when the service was first launched, but many subject librarians felt that such an email could cause confusion between this general reference service and their specialist subject service.

It was noticeable that numbers levelled off in the second semester until we started more active advertising, beginning with the email to all students. This evoked a big response; 17 logins the next day, of which 12 became interactive sessions. The number of logins continued to be high the next week. It is interesting that our advertising efforts also increase the number of people who login but do not go on to ask a question; which might indicate that these are people curious about the service but too shy to say so. Our biggest ongoing challenge remains keeping Online Help in the student vision, so that a user remembers that the service is available when s/he has a question to ask.

### **Other technologies**

Many people agree that chat is likely to have a limited shelf life for virtual reference services, and that other technologies will supersede it. Sloan[25] reported on a number of projects that experimented with videoconferencing technologies in the 1990s, and Coffman[27, 28] has expressed the opinion that Voice over Internet Protocol (VoIP) might be the way of the future. Whatever future technology offers us, we believe that libraries need to develop a presence now in the field of virtual reference. At present the technology offers chat and we should be using it until a better technology is proven and widely used.

### **THE FUTURE**

Time will tell whether users will become aware of library virtual reference services and begin to use them more extensively, whether there is a demand for 24/7 services and whether libraries can co-operate over time zones to manage extended hours. Technology may change how digital reference services are offered, but in our opinion to continue to be relevant in this digital age libraries may need to offer a real-time virtual reference service.

We believe that services like QuestionPoint have great potential. QuestionPoint is a collaborative reference service being offered by OCLC and the Library of Congress, which

promises to enable libraries to provide a “locally branded and customizable question-asking service”[29] with the ability to refer unanswered questions to a wider, possibly even global network of libraries. There are definite advantages in having a common interface and global possibilities, while continuing to maintain the specialisation and unique nature of local services.

On the other hand, we are very glad that we decided to put the time and commitment into experimenting with our own online reference service. There is much to be learned about the nature of digital reference, such as balancing resources and demands, incorporating digital reference into existing services, measuring and evaluating effectiveness and efficiency, marketing strategies, as well as coping with the challenging experience of offering reference services in the online environment. What we have learned will enable us to make informed decisions about whether to commit large amounts of money to co-operative or commercial ventures, such as QuestionPoint.



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