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Utilizing Virtual Reference to Serve Multitype Library Patrons

The Experiences of Collaborative Services in Sweden and Florida

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The growth in the use of electronic resources and an increasingly self sufficient user base that relies on other electronic tools to find satisfactory answers to their questions has been a contributing factor to the sharp decline in the use of face-to-face reference in libraries. Libraries must therefore take advantage of emerging technologies to reach and serve the ever increasing user base that does not enter the library as their first choice for reference. An approach to serving this user base is to provide real-time live chat services to meet the user at their point of need. Libraries that make themselves available to users by providing synchronous live chat service extend their services beyond the traditional face-to-face reference and provide a new component to their

library services. However, many considerations must take place before a library can proceed with entering the virtual reference service arena. Software selection, service hours, training staff, promotion, and ensuring quality are but a few of the considerations that must be taken into account. An additional layer is added to such a service when it is a collaborative service that includes not only many participating libraries, but multitype libraries.

Service Background

Swedish libraries have for a long time been offering email-based services through which users have been able to ask their questions and obtain rapid answers. During the 1990s these services were supplemented at a few libraries with the possibility of chatting with a librarian. Nowadays chatting is a form of communication that is natural to people, especially to the younger generations. Libraries have a great interest in being where the action is with regard to their users and are becoming increasingly aware of the possibilities of reaching users and increasing their reference service in another arena. Moreover, efforts are also being made to render library service more efficient and through cross-sectoral cooperation provide users with better service.

This is the background to the present situation in Sweden where there are two consortia, one for the public library sector and one for the research library sector. These consortia use a shared software, VRLplus, and have a jointly negotiated license.

In Florida, The College Center for Library Automation (CCLA) was awarded a Library Services and Technology Act (LSTA) grant in August 2002 in partnership with the Tampa Bay Library Consortium (TBLC) to implement live virtual reference at all 28 Florida community college libraries, select TBLC member libraries, and the State Library of Florida.

Virtual reference services are becoming a core part of library services and it was a natural fit for CCLA and TBLC to take the leadership role in initiating a statewide collaborative live online reference service in Florida. CCLA's mission is to provide service and leadership in statewide automated library and information resources to enhance the educational experience at Florida's community colleges. This mission is accomplished by providing access to shared information resources; ensuring effective use of technology through training, support, and consultation; researching and implementing suitable new technologies; and providing library advocacy for issues of concern to community college libraries. TBLC is a nonprofit multi-type library cooperative that has worked together with member libraries to provide better, faster service to the residents of west central Florida. Many libraries have been providing online reference via email or via a web form, but this new service has given many libraries their first opportunity to provide live virtual reference services. As a result of training, guided practice, and operational guidelines instituted for the service, participating librarians are well on their way to being confident service providers in this new environment.

Oversight

In order to ensure the success of large-scale collaborative virtual reference services, it is critical to include representation from appropriate governance and participating libraries in the decision-making processes that will guide the service.

In Sweden the service provided by the public libraries, “Ask a Librarian”, and that provided by the research libraries, “Librarian on Duty”, both have a common platform and a certain degree of cooperation, but lack a joint management body.

The public libraries’ “Ask a Librarian” service is led by a steering group in which the coordinator of the national service “Librarian on Duty” also participates as a coopted member.

In the case of “Librarian on Duty”, there is on the one hand a user group consisting of all the librarians working as operators in the system, and on the other hand a joint consultation group consisting of 8 people, including the coordinator of the service. A representative from “Ask a Librarian” will also be participating in the latter group as a coopted member. The joint consultation group discusses proposals for changes in the service, as well as how the service can be developed further. Moreover, decisions can be taken concerning minor issues. When it comes to issues that would entail costs for the participating libraries, e.g. increased opening-hours for the cooperative service, which would result in extra payment for inconvenient working hours, etc., there is a reference group consisting of the heads of the 20 participating libraries. The reference group is consulted before a decision is taken concerning issues that would entail increased costs for the libraries.

Florida’s Ask a Librarian service seeks advice from a statewide advisory committee. The advisory committee comprises of representatives from community colleges and TBLC member libraries, the State Library of Florida, and the Florida Library Network Council. The advisory committee played an instrumental role in making decisions that guide and develop the Ask a Librarian service. Many critical decisions, such as the software to use for the service, the hours of service provided, and the qualifications of participants staffing the service, have been set forth by the advisory committee. Additionally, the advisory committee has continually provided valuable feedback and usability comments on the development of the software.

Four working groups have been initiated on behalf of the advisory committee. The Quality Assurance, Policies and Procedures, Knowledge Base, and Promotions working groups are made up of service practitioners representing libraries throughout the State of Florida.

Launching Live Services

In Sweden the virtual reference service shared by the public libraries started after a study tour in the U.S.A. in January 2001 during which the participants looked at a number of “Ask a Librarian” services. This aroused an interest in starting to work in such a way in Sweden too. Since 1995 Swedish public libraries had been running a shared service for email questions, and a decision was then taken to develop this service further to include an online chat function. The public libraries in Gothenburg, Malmö, Nacka and Stockholm started the “Talk Directly to a Librarian” service on 1 October 2001, and

project groups were formed for the respective libraries.

The academic libraries have been participating in a virtual reference project entitled "Librarian on Duty" for the past three years. The project has been funded by the Swedish Net University, which is a collection of IT-supported higher education distance courses offered by various institutions of higher education in Sweden. Thirty-five universities and university colleges are involved.

The project ended on 31 December 2004 and from 1 January 2005 it has been a national virtual reference service. This means that the funding from the Net University has stopped and the 20 participating libraries are now paying for their own share of the cost, the one-time-cost for installation for the new participants and the license cost each year. So there is no central funding from the Ministry of Education.

The public libraries ran their "Ask a Librarian" service in another system until the beginning of April 2005, when the new system bridge was finally up and running. Since April both "Ask a Librarian" and "Librarian on Duty" have been using VRLplus. This makes the cooperation between the two sectors much easier.

In Sweden the total number of participating libraries is 40, of which 20 are academic libraries and 20 county libraries.

The funding is different between the two sectors. The public libraries' virtual reference service has been funded by the National Council for Cultural Affairs until now, and the Council will be paying for the installation cost and the license for this first year of the system bridge. At the moment there are no plans to adopt a different form of funding in the future.

Before new libraries start to operate in the new shared national service, the librarians who are going to work in the service complete a one-day training course. The course comprises a demonstration of how the system functions and training in chatting technique. This course is most often followed up by more training within the participants' own library before it is time to meet users live on the Internet.

Florida's statewide live virtual reference service, Ask a Librarian, began providing live service on July 28, 2003. There are presently 85 participating libraries representing public, community college, special, school, private academic, and state university libraries from all corners of the State of Florida. At a December 2, 2003 press conference in St. Petersburg, Florida, Secretary of State Glenda Hood and State Librarian Judi Ring announced the Ask a Librarian service as a premier feature of the Florida Electronic Library. The Florida Electronic Library is a centralized online gateway, is the unifying point of access to the variety of online electronic resources that are available through the Florida Electronic Library, including a statewide union catalog, licensed databases, locally-created and/or locally-hosted databases, state and local government resources and educational resources. This relationship with the Florida Electronic Library is a key factor in positioning the Ask a Librarian service as a key component of statewide library services in Florida.

Training was a key activity that took place prior to launching the live service. All librarians are required to attend a full-day training that consisted of training on both the software and general virtual reference skills. Additionally, half-day training was provided

to each Site Coordinator. The function of the Site Coordinator is to serve as the vehicle of communication between the Ask a Librarian service and the participating library. The Site Coordinator is responsible for completing the collaborative scheduling survey and ensuring that staff coverage is provided as agreed.

Service Design

Various models can be utilized to provide collaborative virtual reference services.

In Sweden the system bridge between the two consortia (“Ask a Librarian” and “Librarian on Duty”) was launched in April 2005. The system bridge provides the possibility of easily creating different virtual reference services to be shared between different types of libraries or between specialists of different kinds. For example, one can create a service in which specialists in the sphere of technology, for instance, can cooperate through a shared reference service. It is also possible for public libraries and research libraries to cooperate in a simple manner and to send questions between the different sectors without any problems. The important thing is that the end-user should receive the help that he or she needs.

“Ask a Librarian” has three project managers who bear the main responsibility for the service. For “Librarian on Duty”, there is a coordination officer who is based at the Royal Library (Sweden’s national library) and is also responsible for negotiating the cost of the license and for a certain amount of marketing. The national library is also responsible for hosting the system on behalf of both the research libraries and the public libraries. However, routine issues such as drawing up duty rosters etc. are dealt with jointly by the participating libraries.

Since the system bridge started so recently, an assessment has not been made of how the bridge has influenced work in the reference services; although a follow-up study of this will be conducted eventually. However, it is important to give the cooperation time to start functioning before an evaluation is carried out.

In Florida, there is one collaborative (statewide) desk that is monitored by library staff representing all types of libraries. While the target audiences of Ask a Librarian are the residents of Florida, staff monitoring the collaborative desk will provide service to anyone that asks a question. Whether a patron enters the service via the customized entry page of a participating library or via the main Ask a Librarian entry page, a staff person staffing the collaborative desk will assist them. Access to the software is provided to each library that contributes staff time to the collaborative desk. In addition to staffing the collaborative desk, participating libraries are also provided with a local copy of the software in which to utilize to staff a local desk. While staffing the local desk, libraries directly provide service to their patrons who enter the service from their local library entry point. The collaborative (i.e., statewide desk) is scheduled by Ask a Librarian administrators based upon a scheduling survey submitted by the Site Coordinator for each institution. Libraries are able to staff the local desk whenever they elect to do so.

Presently, staffing a local desk and the collaborative desk requires a separate login. In the near future, a software upgrade will allow library staff to staff multiple desks from one login. Additionally, there will be a feature that allows for the creation of virtual desks. This enhances the possibility that a patron will be served by a librarian of a similar type library. For example, if a patron enters the service from a school library, the software will

look to see if the local school librarian is available. If the local librarian is not available, the software then checks to see if a school librarian from another school is staffing the school desk. If there is neither a local librarian nor a school desk librarian available, the patron is then provided to staff monitoring the collaborative desk.

Service Features

Sweden utilizes Docutek's VRLplus as shared software for both "Ask a Librarian" and "Librarian on Duty". The system is capable of handling email questions, chatting and so-called co-browsing. The most important advantage of the co-browsing facility is the unique possibility of guiding the user in a pedagogic manner. For example, librarians can show users how to search in different databases, at the same time as users can show librarians how they have carried out their search and where problems have arisen.

Another advantage of the system is that the chat session can be sent to the user's email address afterwards, which makes it possible for the user to return to the session transcript later on and study how the search was carried out and which links were visited. The librarian is given the possibility of supplementing his or her answers afterwards and providing the user with further assistance.

When showing the different databases, it is the user and not the librarian who should log in. The reason for this is that our database licenses do not allow access to anyone who has not paid for the license in question.

Since the month of April, both services have been using a common homepage:
www.eref.se

Florida also utilizes Docutek's Virtual Reference Librarian Plus (VRL*plus*) software. Ask a Librarian offers capabilities for one-on-one online interaction and teaching sessions through the software's chat, co-browsing, and other features. Co-browsing allows librarians to show patrons how to use web-based library resources and open web resources by "pushing" pages to their screen.

In addition to obtaining live help from a librarian, users can send questions via e-mail and search the Knowledge Base for already asked-and-answered questions. Rather than relying on the front-end user interface supplied with the out-of-box Docutek software, a separate, database-driven interface which allows for more flexibility in design, linking to non-Docutek digital reference services, and presentation of locally relevant information for participating libraries and customizable information on the Web page. Since an independent, customized front-end to the VRL*plus* software has been implemented, each library participating in this project has its own customized one-stop interface, or portal, linking to local reference services as well as to the collaborative service. The Florida Ask a Librarian service is available from www.askalibrarian.org.

Meeting Users at their "Point of Need"

The unique quality of virtual reference service is that it serves to meet users at their "point of need" with the assistance of a librarian. This means providing service to users wherever they are, and at a time when they need the assistance of a skilled librarian to navigate the maze of web-based library resources and sites on the open web to find the answers to their questions.

In Sweden each participating library handles its own marketing of the service. This means that the library in question places a link to the service in as many of its own Web pages as is possible. It is also possible to insert a link to the service in certain of the license-controlled databases. In these cases one is therefore able to offer users a direct link to assistance and service whenever their need for help is greatest, e.g. when they have got stuck in a search and need assistance to proceed.

The public libraries in Sweden have conducted surveys of users' opinions of the possibility of chatting with a librarian. These studies show that almost 95% of the users are "satisfied" or "very satisfied" with the assistance and service that they have received. As yet no major surveys have been conducted concerning the research libraries, but the few minor questionnaire studies that have been carried out also show a very high level of user satisfaction.

In Florida, we have provided participating libraries with a variety of web-ready Ask a Librarian graphics with instructions on how to link to the service. We encourage libraries to include these links throughout their library website. Additionally, we encourage libraries to place links strategically throughout their institution's website wherever users might need assistance. Institutions with the highest use have placed the logo and links within a recurring table of contents and included the link within their online catalog or the databases that they provide.

The reaction from users of the service since its July 28, 2003 launch has been outstanding, with over 90 percent of patrons surveyed reporting that they would use the service again. Nearly 70 percent of users indicated that their reference question was completely answered, with another 20 percent indicating that their answer was partially answered or needed e-mail follow-up.

Service Expansion

In Sweden the fact that all twenty of the country's county libraries are participating in the virtual reference service means that the service covers the larger part of Sweden's public libraries. When the research libraries' "Librarian on Duty" project started 3 years ago, only four libraries participated. Now that the joint national service has been initiated, 20 research libraries are participating. Nineteen of them are university libraries and the remaining one is Sweden's national library.

The opening hours for the public libraries' "Ask a Librarian" service are: Monday to Thursday 10 a.m. to 6 p.m. and Friday 10 a.m. to 4 p.m.

And the research libraries' "Librarian on Duty" service has the following common opening hours: Monday to Friday 5–9 p.m. and Saturday to Sunday 1–5 p.m. Many of the participating libraries also keep the service open locally in the daytime for their own users. Moreover, the email service is open 24/7.

Florida began Ask a Librarian with 40 participating libraries. As of this writing, 85 Florida libraries have submitted partnership agreement forms to participate in Ask a Librarian, making Florida's Ask a Librarian service one of the largest statewide collaborative live virtual reference services in the United States. Over 700 staff from participating libraries have been trained to staff the service. Initially, Ask a Librarian's live chat was available

Monday through Friday for a total of 30 hours per week. Presently, live chat service is currently available to users 7 days a week for a total of 79 hours per week. The service is presently open Sunday through Friday from 10 a.m. to 10 p.m., and 10 a.m. to 5 p.m. on Saturday.

Partnering libraries quickly realized that sharing online reference services between libraries is a “win-win” opportunity. Though a library may only staff the service for a few hours per week, the benefits of collaboration allows their users to be provided with live reference assistance for the entire 79 hours the service is available, since the other participating libraries are staffing the service at those times when their library is not.

In addition to live chat service, e-mail service is available 24/7. When a patron submits a question via e-mail, it is submitted directly to the local library.

Promotion

Promotion is a key component that propels any service towards success.

In Sweden marketing is one of the big issues for the country’s virtual reference services and at present work is in progress to promote marketing. The universities are responsible for their own Web sites, and experience from Jönköping University, where links to “Librarian on Duty” have been inserted in more or less all the University’s Web pages, indicates that this is a good method to reach users. Another effective method is to keep the service open locally in the daytime. This makes users conscious of the fact that such assistance is available, which leads to the service being used at other times than during the daytime.

The Royal Library (Sweden’s national library) has also issued press releases jointly with the National Council for Cultural Affairs. The most recent one concerned the launching of the system bridge.

In addition, jointly compiled brochures have been published during the project period and cooperation concerning this type of marketing will also take place in the future to a certain extent.

Moreover, not only do representatives of both services often participate in different conferences where they present the services to both international and national audiences, but they also try to appear as much as possible in the mass media.

In Florida, two initial marketing campaigns launched in 2003 target established library groups: the first is a traditional marketing scheme aimed at existing library users, while the second markets Ask a Librarian to library staff. To promote the service to library users, participating libraries were first provided with promotional materials consisting of bookmarks, note sheets and holders, to be displayed prominently throughout the library. The target audience for this campaign was both high school and college-age students. They were chosen as the primary market for Ask a Librarian because studies show this age group is most familiar with the chat medium as a form of communication. To promote the service to library staff, the first promotional item that was produced was a pin with the service logo. These pins were distributed to staff at every opportunity, including promotional events such as the Ask a Librarian poster session at the Florida Library Association Annual Conference, at the Florida Public Library Director’s

Conference, informational demonstrations, and at Ask a Librarian training sessions. These pins helped promote the visibility of the service and were a recruiting tool. Another effort also targets the frontline staff in participating libraries, and is currently ongoing. Promotional boxes containing items with the Ask a Librarian logo are being created and delivered to each participating library. These boxes have a myriad of promotional items including staplers, letter slitters, lanyards, CD cases, and coasters for distribution to staff as part of staff orientation programs. This campaign's goal is to increase the visibility of Ask a Librarian with frontline staff in participating

To increase visibility of the service at participating libraries, each library was provided with an Ask a Librarian logo for its Web site. This logo serves as the unique hyperlink to the service from each library's Web site. Several similar looking versions of the logo were made available to libraries so that they could choose which style and size fit best within their existing Web site. Suggestions were made to library staff as to the best placement of the logo. Placement of the logo and link is especially important in promoting the service to end users; if Ask a Librarian is prominently displayed on the library's Web site, the service will be more heavily used than if it is hidden several layers down on the site.

In the summer of 2004, online advertisements were placed in newspapers throughout Florida to promote the service to non-traditional library users. This campaign was an effort to promote the service to users who were not already in the library or visiting the library's website.

Future Ask a Librarian promotional efforts in Florida will be more closely aligned with the Florida Electronic Library initiative. The Florida Electronic Library is available from www.flelibrary.org.

The Collaborative Model Positions Libraries to Succeed

Whether in Sweden or Florida, library users will have access to fast, professional staff that can guide them to the most effective resources available to meet their needs. Sharing the wealth of resources has enabled many libraries to participate in collaborative live virtual reference services. Otherwise, these libraries would not have the available staffing and technical expertise to implement and run live chat services individually. The collaborative model also enables the technology-shy libraries with the opportunity to slowly step into the water and try virtual reference in environment that already has a stable foundation.

Functioning as a component of a collaborative service, libraries work together to meet the needs of users who seek and/or prefer assistance in an online medium. Virtual reference improves access to information, whether it is freely available on the open web or available from a library provided database, and is a key library service in meeting the user in the online environment. Positive survey results and increasing use are solid indicators that collaborative virtual reference services in Sweden and Florida are effectively meeting the needs of the users they serve. While these new collaborative services currently focus on serving their present user communities, perhaps the future will provide opportunities for broader collaborative partnerships.