

Virtual Reference in CARL Libraries and Institutions

Introduction

In 2002 a survey was sent out to 124 ARL Libraries probing the use of chat reference. Key issues addressed were training, software selection, staffing, organization and management. This survey provided a comprehensive analysis of the situation in American university libraries as it existed at that time. Our research was intended to probe the Canadian university library situation and also to discover what if anything had changed over the 4 yr period between the original survey and ours. The initial step was to gain permission from the original authors Jana Ronan, Associate University Librarian and Carol Turner, Associate Director, Public Services Division, both of the University of Florida to use their survey as the basis for the Canadian one. By repeating the survey the authors felt that valuable benchmark data would be gained in addition to simply acquiring information on chat reference in Canadian university libraries. With permission obtained 29 surveys were sent out to CARL institutions in May 2006. For the purpose of our study “chat reference” was “defined as immediate interactive reference delivered via computer and real-time communication software such as chat, instant messaging, and other conferencing media”, the same definition as that used in the original survey.

Methodology

The sample population was inclusive in that all 29 CARL institutions were included. Because Canada is bilingual an immediate challenge was producing a French translation. We tried several different strategies including an automated translation service, the assistance of the liaison librarian for French, Italian and Spanish and eventually achieved what we felt was a reasonably accurate translation. Our second decision concerned what method would be used to actually send out the survey. Because of we wanted to be able to gather statistics easily the authors decided to use Zoomerang a web based survey tool. This involved using the help of an IT staff member to put the survey into Zoomerang and also resulted in the modification of some of the questions to fit the format required. As a result although the data manipulation was easier in some cases, in others the analysis was more difficult.

Summary of Results

Twenty-nine surveys were sent out. The survey included 36 questions covering services, management, training, software selection, use and evaluation. In total sixteen responses were returned for a response rate of 55%. This response rate compared favourably with the ARL survey of 2002 which had a response rate of 53% based on a return of 66 surveys out of a possible 124. Nevertheless there are substantial differences between the Canadian and American survey which make comparative analysis difficult. Although 16 responses do reflect 55% of the total population it is still a small number. This issue was further compounded by the fact that of the 13 institutions who responded ‘yes’ to having chat reference only 10 of these answered a majority of the questions. So although the total response rate was 55% in reality, when you consider the quality of the responses it

was 45%. Because of the small number of respondents the authors are hesitant to generalize to the total population. With that proviso we found the following trends.

Major Highlights

There appears to have been an uptake in chat reference. And of those providing chat reference the trend has been away from chat software products towards using Instant Messaging. The use of chat reference services in terms of the numbers of clients using the service appears to have increased in 7 of the 10 institutions over time. Finally more than 60% of the respondents have offered chat reference for more than 2 years. And 40% have offered it between 6 months and 2 yrs. In the ARL survey only 6% had offered the service for more than 2 years and 75% had offered it for between 6 months and 2 years.

Software

Chat reference is being provided both through specialized software and instant messaging services. The specialized software that is being used includes Docutek, VRL, Sirsi/Dynix, QuestionPoint and Ask A Librarian. A number of institutions are using both instant messaging and a specialized software product. The most common instant messaging product used is Microsoft Messenger MSM. In comparison to the ARL survey the authors noted a decrease and change in the software products available as companies merged and died and an increase in the use of Instant Messaging. The result is an evolving and changing market place.

Elements in Selection

When asked “What features led you to select the currently used software? Check all that apply.” of the 8 responses received elements were rated as follows.

Accessible via Web browser with no software required	8	100%
Push page technology	5	63%
Co-browsing/escorting	5	63%
Statistics/reports	5	63%
Automation of frequently used resources (phrases, web pages, links etc)	3	38%
Price	6	75%
Works with PC's Macs and other systems	2	25%
Alerts	0	0%
Voice over IP	0	0%
Whiteboarding	0	0%
Other, Please specify	3	38%

Responses to Other, Please specify included the following

- French version,
- bilingual version
- collaborative queues.

In comparing the Canadian results to the American there was greater prominence given to price and slightly lower interest in co-browsing, push page technology and statistical reports. FAQ's were also of lesser concern. The top ranked requirement in both surveys was the desire to have products which were accessible via the web with no software required.

Managing the Service

General reference librarians were the primary providers of the service. Others who also contributed substantially were subject specialists, instruction librarians, and other support staff. Chat reference was usually performed as part of an ongoing reference assignment supplemented by volunteers. The average number of hours provided by one individual was between 2 and 4 hours per week. It was normally performed in an office and not at a service desk. The management structure was mixed.

In response to the question "What is the title of the individual who manages the day-to-day operations of the service?" great variety can be found.

Team	1	10%
Head of Reference	2	20%
Head of Electronic/Digital/Interactive Reference	0	0%
Other, Please specify	7	70%

Responses to Other, Please specify included the following.

- Virtual Reference Coordinator
- Chat Reference Manager
- Coordinator 'Ask a Librarian'
- Coordinator Virtual Reference
- Public Services Librarian
- Responsable de Projets Reference Virtuelles
- Manager of Reference

In response to the question "To whom does this individual report?" variety is also evident.

Director	1	10%
Assistant/Associate Director	3	30%
Head of Information/Public/User Services	1	10%
Head of Reference	2	20%
Other, Please specify	3	30%

Responses to Other, Please specify included the following.

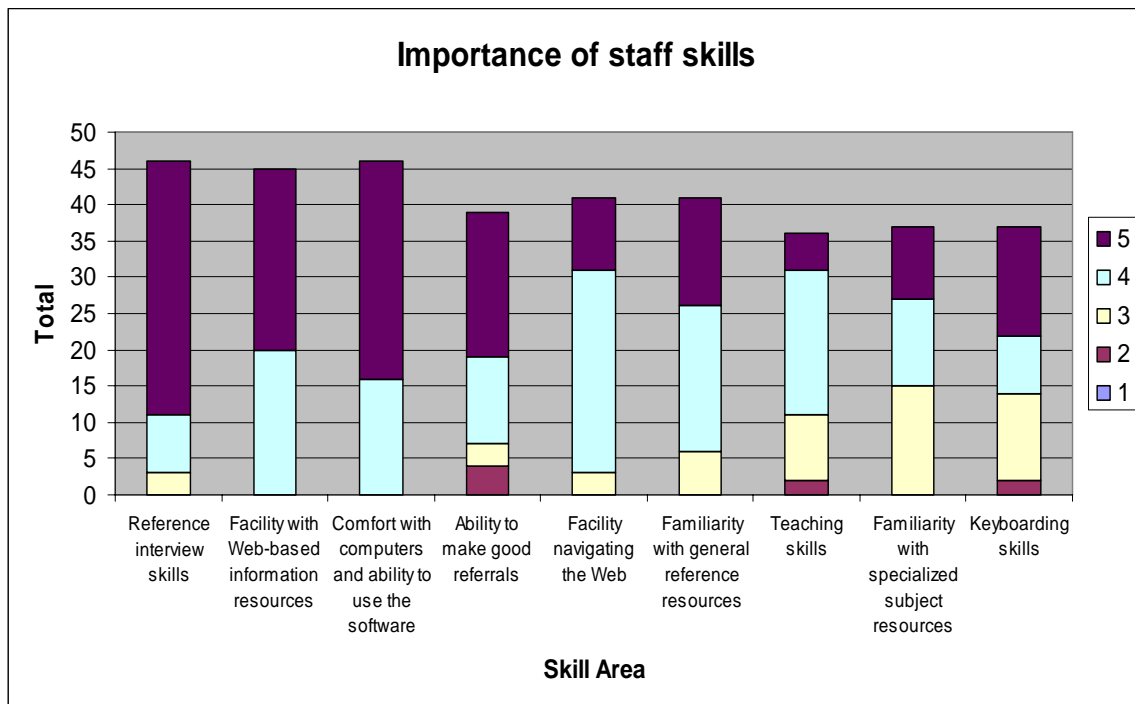
- AUL Public Services
- AUL
- Varies depending on the site.

In analysing the importance of the service to the institution one possible approach is to look at who manages the service and to whom does that manager report? The great variety found in responses to the two questions that dealt with this subject appear to indicate that virtual reference is not perceived as having great importance. One question that could be asked is why this is so given the emphasis on reaching online users.

Staff Skills and Training

Respondents were asked to comment on how important certain skills were for staff in offering chat reference. A likert scale with 1 being 'Not important' and 5 being 'Most important' was used to rank responses. The three most highly ranked skills were conducting a reference interview, facility with web-based information resources, comfort with computers and ability to use the software, followed closely by the ability to make good referrals. These four skills sets were deemed equally important in the ARL survey. In response to the question "Did current staff require additional training?" ten out of ten respondents answered yes. Specifically training was required in the use of the specialized software and in chat technique. Further research might address topics such as how long did it take to train, is ongoing training necessary and were staff prepared enough when they started?

Note: The chart below is a proportional representation of specific skill requirements based on the number of respondents who gave it that specific rank. If 9 respondents ranked 'conducting a reference interview' as 5 in order of importance then the proportional representation would be 45.



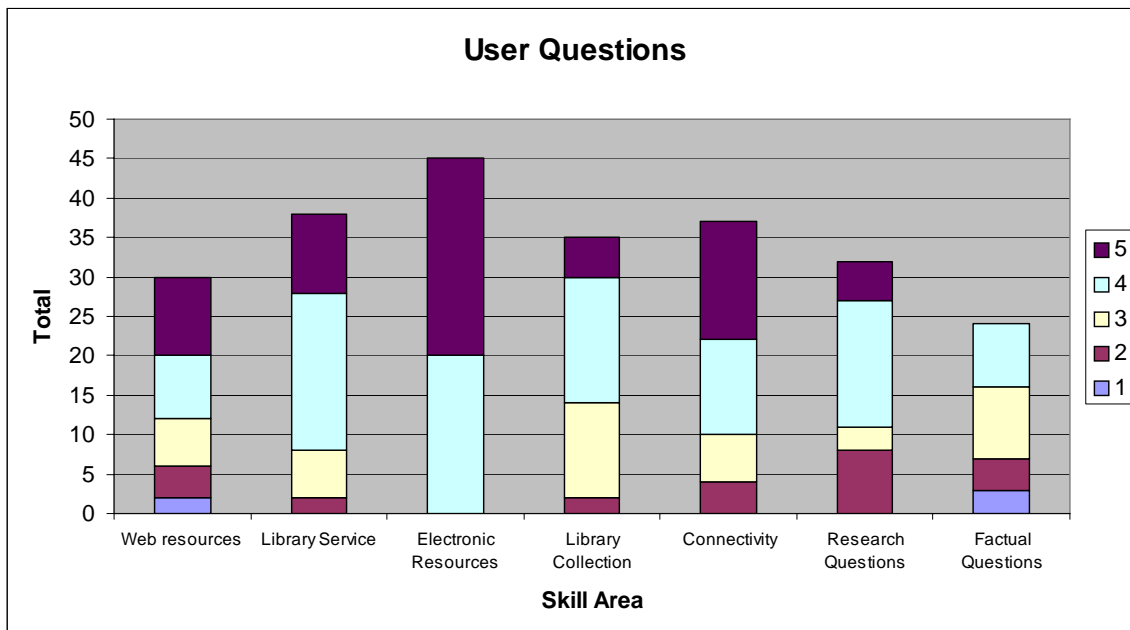
Service Models

Most institutions limited the chat reference service to Monday – Friday with some offering service on Saturday and Sunday. Half of the institutions offered the same service throughout the year and half reduced it during spring and summer. The total number of hours per week for service during the academic year was between 30 and 60 hours per week. However this data is inconclusive because only 6 respondents out of ten answered this question. The average number of hours per week for service during the academic year provided by ARL institutes was 43 hours. In terms of who could use the service, 8 out of 10 institutions had no restrictions. Despite this liberal approach, however, the service was used most by undergraduates, according to 9 out 10 respondents. The ARL survey also indicated that the service was most used by undergraduates.

What Are Users Asking?

Users asked the same types of questions that they asked in person. The two highest categories of questions had to do with help with the use of electronic resources and information on connectivity. In-depth research questions and basic factual questions were asked less often.

The chart below shows a proportional representation of questions, where 1 equals 'Rarely' and 5 equals 'Most Often'.



Marketing the Service

Institutions marketed the service along traditional lines. With respect to how easy it might be for a user to find the service 7 institutions placed the link to the chat reference service at the top level of the library web site. New to the CARL survey was the use of Blogs and course management systems to market the service. In response to the question, “How has the chat reference service been promoted to users? Check all that apply.” the following examples were cited.

Highlighted on library web pages	9
Included in library orientations and instruction	10
Library newsletter article	7
Articles or news releases in local paper	3
Flyers/posters	6
Correspondence with users	6
Bookmarks	4
Course management system	3
Other, Please specify	2

Responses to Other, Please specify included the following

- Library Blog
- Not marketing at this time.

Evaluation

The following techniques were used to evaluate the service. More than one category could be checked.

Track the number of transactions.	8
Ask users to fill out a web survey	5
Conduct focus groups	2
Interview users periodically	0
Review chat transcripts	7
Other, please specify	

Responses to Other, please specify included

- ongoing staff consultations
- periodic surveys.

Libraries were asked to provide their perception of the performance of their chat reference service according to the LibQual format whereby a minimum acceptable level, a desired level and an actual level of performance is rated on a scale of 1- 9 with 9 being highest. The four areas that were examined were

- Ease of use of chat reference
- Number of service hours
- Accuracy of answers
- Evaluating the service

Of these four most libraries rated the ease of use of their service between 7 and 9, service hours between 4 and 6, accuracy of answers between 7 and 8 and evaluating the service between 6 and 7. In all cases there was a desire for an improved performance with lesser concern being expressed for evaluation than the other three areas.

Further Research

While this study was interesting many of the more challenging questions remain unknown. Does offering virtual reference impacted the use and collection development of reference resources? Do we purchase more digital resources? Are clients who use the virtual service different from non-users? What is the comparison between virtual reference and traditional face-to-face reference? What percentage of the overall reference service is the virtual service? How should virtual reference be evaluated? As our users move more steadily into an online environment answers to these and other questions may assume greater importance.

Conclusion

In comparing the results of the CARL survey to the ARL survey many seem very similar. The greatest difference appears to be the move towards instant messaging and the number of institutions that have now offered the service for more than two years. Libraries have chosen easier access and low cost implementation over advanced features. We speculate that they have chosen this route because it minimizes the necessity to devote limited resources to training, maintenance, and other staffing issues. Since instant messaging is pervasive among users, this solution appears satisfactory to both.

Finally I would like to recognize the contribution of my colleague Susan Beatty, Head, Information Commons, University of Calgary Library for her thoughtful insight into the analysis of the results and her general contribution to the study from its inception to the finish.

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