

CASE STUDIES

Individual cases from each of the major types of libraries are described below. Understand that each of these cases demonstrate that online reference service can begin and thrive within the right environment. For some, the enthusiastic support of the service exhibited by all levels of employees and users warranted its selection. For others the extraordinary cooperation among staff members or volunteers made the program a success. Still others demonstrate the Herculean task of establishing and maintaining a live reference service.

Special library

A business library doing business online

The James J. Hill Library, a private institution founded in 1921, has a long history of assisting patrons electronically. Beginning with e-mail reference (instituted years ago), the library was one of the first libraries to experiment with videoconferencing. Its aim was to help patrons use the library services and databases by learning what patrons were doing on their home computers. Using the Zibex video system in 1999, the Hill Library tried adapting a commercial product for this purpose. This solution proved to be buggy, says Patricia Hoskins, the Hill Library business information specialist, so the library replaced the software with a Citrix-based solution. This Citrix solution, which is designed to allow secured Internet-based access from any device via any connection, once again was deemed inadequate even though it had been pricey.

In October 2001 the library installed LSSI, virtual reference software. "It is better and more reliable than the other systems," Hoskins says. She is especially pleased because service is enhanced when the librarians can see the patrons' computers.

The library provides live online chat Monday through Friday, 8 a.m. to 5 p.m. Six full-time librarians rotate shifts between the remote reference desk (from which they handle phone, e-mail, and chat reference service) and the traditional reference desk.

Access to the service is provided exclusively to the library's "Plus Membership Program," which also includes access to the library's subscription databases. Authorized members are provided with usernames and passwords to access both services.

Interest in this service is high and patrons like it, says senior marketing manager Shelley McKay. "Not everyone is a librarian and with chat they can find the information they are looking for." Of the 300-plus members of the library, the staff averages about two chats per day. The library did not add any staff to offer the chat-based service, but when the number of chats approach 20 to 25 per day, they will consider doing so, Hoskins said.

The staff's reaction to the service has been positive. Staff received training and practice before launching the service, which Hoskins recommends as the most important element for anyone considering live online chat. In addition, she recommends libraries staff virtual reference at a location apart from the in-library reference station. She suggests libraries offer the service during all hours of operation.

Zibex video system,
www.zibex.com

Citrix, www.citrix.com

Information for this case study was taken from Karen Hyman's presentation "New Jersey Reference Goes Live: Virtual Management of a Statewide Virtual Reference Project." Virtual Reference Desk Third Annual Digital Reference Conference, Nov. 12, 2001.

Publicity for the live online service was launched in conjunction with development efforts to recruit new members. In the spring the library sponsored programs on the local National Public Radio affiliate's business program. The library also has used press releases and news stories to spread the word. In the future it plans to expand publicity efforts, especially in the broadcast area.

One of the most avid supporters—and users—of the service is its own president. "I am very, very pleased with the results," library President Sam Richter said. "I definitely plan to expand the hours and add staff in the future.... I can't tell you how many times live chat has saved me." He cites a recent question he was trying to answer about the local consumption of organic turnips. "In a million years I never would have found the answer," Richter said. "With live chat, I had it in five minutes."

Richter's reaction demonstrates one of the greatest strengths of live online reference. Like the little girl with the curl—when it's good, it is very, very good. Especially because of low initial usage statistics, many libraries are inclined to abandon online reference service when the numbers are unimpressive. But when a library administrator sees the service can yield an answer in merely five minutes, the service obviously deserves a place in that library's options of online resources.

Library consortium

The Olympics of project management—a statewide virtual reference project

This consortium project was an administrator's ultimate dream. Funding was made available, and the consortium could hire more staff, provide a new model for statewide service, and demonstrate leadership in the field. What did the consortium need to do in return? Simply establish a statewide Virtual Reference Project. *Simply?* Little has been simple about it. As Karen Hyman, executive director of the South Regional Library Cooperative says, managing the QandA NJ Reference Service has been "the Olympics of project management." But the effort has been valuable for myriad reasons, not the least of which includes increased visibility, increased use of libraries, and new reference skills obtained by all concerned.

The Library Services and Technology Act (LSTA)-funded statewide New Jersey virtual reference project began as a South Jersey Regional Library Cooperative (N.J.), project in January 2001. Dubbed "QandA NJ," over a period of months the service was expanded to other regions within New Jersey until it became a statewide system. Twelve libraries formed the core of the initial project. Currently QandA NJ includes 19 public and community college libraries across the state. The service averages about 100 questions per week.

Using LSSI Virtual Reference Software, each participating library provides live online reference service in two-hour slots. Each library is required to appoint a project manager to oversee the day-to-day operations for each location. All staff involved receive training and practice, which was initially conducted in person by LSSI, but now online Web-based training has been made available. Evaluation is conducted through a customer feedback form, statistics analysis, and transcript review.

Effective marketing was key to implementing QandA NJ. Bookmarks, posters, press releases, and flyers were all used. Local bookstores agreed to distribute

bookmarks, which proved effective. Reaching out to local organizations to distribute bookmarks and place links on their Web pages continues to be integral to the marketing strategy.

Participating libraries are all involved in marketing, but Hyman stresses that most of the publicity work, such as logo design and Web graphics, were created by the South Jersey Regional Library Cooperative. She recommends that these types of duties remain centralized to maintain a unified identity for the service.

Among the most interesting lessons the New Jersey librarians learned from the management of live online reference has been the realization that the technical issues involved in live online reference are being solved more rapidly than the human and organizational issues. "With 12 libraries, there were also 12 different cultures, 12 different visions of service, 12 sets of policies and procedures, and 12 individual personalities among the project managers," Hyman says.

Communication streamlined these 12 into one service. "We balanced high-tech with high-touch through face-to-face meetings, weekly online sessions, and continual e-mail and Web contact," Hyman says. Listservs also helped keep everyone connected, with one list just for service providers and one for project managers.

Hyman can't predict the future for QandA NJ. She does know, however, that live online reference service is a great opportunity for the libraries involved. At no cost, the participating libraries received software, training, and a whole new service, and benefited from participating with a dynamic group of libraries for shared staffing, troubleshooting, and coaching. QandA NJ also afforded all involved with a valuable public relations opportunity, as well as a chance for the libraries to be in the forefront of developing reference service statewide and nationally.

Academic library

Librarians online—see how they grow

The Maricopa County Community College District had no money, no staff, no office, and no software. What the library did have, however, was a belief that e-reference is an essential service for libraries to provide.

From these humble and all-too-typical beginnings Maricopa District's live online reference service has grown to include 17 librarians in eight colleges, offering live chat-based reference service Monday through Friday, 10 a.m. to 4 p.m. As of fall 2001, the Librarians' Online Service was handling 86 chat sessions per week. Student comments so far have been overwhelmingly positive, and along with these comments the service has received positive financial news. Initial approval has been secured to purchase a commercial software product next year.

Getting from there to here was not instantaneous or painless. Most importantly, success was only attained with precise planning.

The Maricopa District includes 10 accredited colleges, two skill centers, and several satellite education centers. The full-time student equivalent enrollment is almost 40,000.

The live online reference service began with the formation of an ad hoc committee in March 2000, followed with an announcement to the library

Information for this case study was taken from Shelle Witten's presentation "BEING RAD: Reference at a Distance In a Multi-Campus Institution." Virtual Reference Desk Third Annual Digital Reference Conference, Nov. 12, 2001.

staff of the project-in-the making in August that year. The community college has a process for awarding internal grants for pilot projects, so the library applied for \$5,000 from this internal fund, which was granted in December 2000.

The pilot project was launched February 2001 and included seven librarians providing live online service in the evenings until 11 p.m., Sunday through Wednesday. Using AOL's Instant Messenger software, Witten says the main goal during this period was to gain experience with the tool. During this phase only the Maricopa College community was served and, to avoid copyright and licensing violations, only its core databases were used.

Publicity for the service began with the design of an inviting cartoon-like logo, which linked to the service. The link was placed on all the college library Web pages, and departmental and course-specific pages. Flyers, bookmarks, student newspaper articles, and ads followed, as did campus and district-wide presentations on the new service. Library instruction sessions included mention of this new avenue for students to receive help with their assignments.

Evaluation of the project included a live evaluation form, statistical analysis and a review of the context of the chats. In its first six weeks, 86 chats had been held. Due to the overwhelming response to the service, the group of libraries plans to pursue additional funding, especially to support a coordinator for the project. In the future, the libraries hope to involve more librarians, purchase additional seats, and extend the service hours. An online procedure manual to formally document policies and procedures also is planned.

Public library

Live online reference service—one flower in the garden

In October 2000, the Multnomah County Library's Ask Us! Online was awarded the Virtual Reference Desk Exemplary Service Award for defining quality digital reference service on the Internet. The service was lauded for being comprehensive, following recommended best practices, and experiencing exceptionally high volume. "We were pioneers," says Donna Reed, Multnomah's information system coordinator. "But the real reason we got the award was for the people, which is why I dragged up six or eight people to accept it with me."

Multnomah County Library is Oregon's largest public library with a central library, 14 branch libraries, and a collection of almost 2 million items. The staff includes 301 full-time employees, 201 part-time employees, and 128 on-call employees. The Ask Us! service operates free of charge during the central library's operating hours to those within the library's service area.

What makes the VRD Award especially noteworthy is that the new reference project was just one of many innovative programs offered by the library. The same year Ask Us! Online received the VRD award, the library sponsored a Web camp for middle-school students. The library also conducted an innovative strategic planning process, held an extensive staff development program, and participated in a boundaries-busting school-public library cooperative project.

As this impressive list of innovations attest, at Multnomah virtual reference is just one of many avenues offered to serve patrons. "Libraries should consider digital reference as just another component of their service," says Rivkah Sass, Multnomah County's reference and information services coordinator. "This type of reference is not more important, nor less important. It is just different." Rather than being *the* service to library users, at Multnomah County online reference is viewed as a service—one program among many designed to provide assistance to patrons when and where they need it.

Ask Us! Online uses a Web-based form, which is sent to a central telephone reference service. After being assigned a number that patrons can use for follow-up, the question goes through triage and is either answered or forwarded to a specialist. Along with patrons sending questions, telephone reference and branch staff use the reference Web forms to record and control questions requiring further assistance.

Before a patron posts a question, the system provides the following online messages: "If you are inside a library building, please talk with reference staff before using this service" and "If you would prefer to talk with a real, live human being, you should call their reference line." As these strategically placed statements remind users, online reference is still only one of many different avenues of service: phone, in-person, or electronic access.

Ask Us! Online began as an interactive reference assistance program in 1999 but was preceded by an entire year of planning and internal library testing. Originally offered as a simple Web form, Ask Us! Online was transformed into a sophisticated database, complete with statistical and archiving capabilities by members of the library staff. As Reed points out, its homegrown solution was created before commercial software packages were available.

The library is carefully planning its next step in digital reference. Under the leadership of Project Librarians, it is conducting a thorough survey of the reference service of several other library systems. The information gathered through this effort will form the foundation for the service's next phase.

The library also has been invited to participate as a pilot site for the Collaborative Digital Reference Service (CDRS) software currently under development. An assessment of the best way to fold that system into the library's overall strategic plan is being addressed. "We will need to see how we integrate online reference into other ways of service," Sass says. In other words, they are methodically assessing the best way to plant the online reference flower within their garden of library services.

School library cooperative

Collaborating for children

"How will kids connect to the Internet in the new Millennium?" asked attendees at the American Association of School Librarians (AASL) during the American Library Association (ALA) Annual Conference in 2001. Experts see "KidsConnect!," an AASL initiative, as the best way to connect K-12 students with trained school media specialists. ("KidsConnect in the New Millennium," ALA Annual Conference, June 16, 2001)

KidsConnect is a technology initiative of AASL made possible through a partnership between AASL and Drexel University's College of Information

SRI International,
[www.ala.org/ICONN/
askkc.html](http://www.ala.org/ICONN/askkc.html), 2/10/2002

The FAQs are available at
[www.ala.org/ICONN/
kcfaq.html](http://www.ala.org/ICONN/kcfaq.html).

To join in this new venture—
which some librarians say
holds the future of school
library assistance—e-mail
Colleen Zanger,
KidsConnect coordinator at
colleen.zanger@cis.drexel.edu.

Science and Technology. Hosted by SRI International, the goal of the service is to connect librarians, teachers and students with curriculum-related material on the Internet. The service is aimed at K-12 students looking for information on the Internet for a report or project to do for school.

KidsConnect began in 1996 as an online service underwritten by Microsoft to help students learn how to use the Internet. The initial goal of the program was to offer free question-answering, help, and referral service to K-12 students. From the initial 45 questions received in its first month, KidsConnect witnessed a huge increase in question volume—by the end of its first year the service had responded to 4,000 questions.

The service uses volunteer school librarians to suggest Web sites and resources to assist students. As an e-mail based service, KidsConnect promises a response from a volunteer library media specialist within two school days. After posting a question, students receive an automatic response from the central server that their question is being forwarded.

KidsConnect attracts volunteers from all over the world, including the United States, Australia, Canada, Israel, and New Zealand. Volunteers vary in their levels of expertise with electronic technologies, but they share a common desire to learn about Internet-based assistance. To volunteer, responders must be AASL members (or join after becoming a volunteer) and must have Internet access and a reliable e-mail system. After participating in online training they receive one or two questions per school day to which they must respond within two school days during their on-duty month.

The volunteers receive questions through e-mail from a centralized KidsConnect main address. Volunteer media specialists are assigned to a team of eight to 10 members, with a team leader serving as the question router, troubleshooter, and quality monitor for all questions. A partner team also is available to provide support and quality control.

Many volunteers join in when they learn they are not expected to answer all questions asked of them; instead, they are instructed to point students in the direction of sources to try. Students are always referred to their own school library media specialist for further assistance.

Along with providing direct assistance, KidsConnect has developed an extensive archive of Frequently Asked Questions (FAQs) received from students. For many students this archive provides the information they need to complete their projects.

Along with providing educational offerings to students, KidsConnect also strives to teach media specialists and teachers about online reference. Providing an opportunity to learn the skills necessary to navigate on the information superhighway is an important component of this organizational initiative.