

## Digital Reference and other options

What is required for us to do “virtual reference?”

We already offer email reference, but the majority of the questions we get come from phone calls and in-person questions. To provide virtual reference we would first need to decide a few things:

- What software do we use?
  - o There is a large variety of software options available to use from free services like AOLIM and other messenger service to services that will charge us based on what we want from them.
  - o Free services are simple chat and one-on-one services and do not include co-browsing options, customization, transcripts and other features. Also, it requires that not only we set up accounts, but that those who wish to use the service set up accounts. This also opens us the likely possibility that patrons in the library will be using these services for personal use.
  - o Fee-based services include many great features like co-browsing which allow us to see what the patron is looking at. Also, most provide transcripts and keep statistics for us. Many will allow patrons to maintain anonymity and not collect (or maintain) personal information if we don't want.
  - o We also have to think about system requirements. While the free services often have versions for every kind of operating system, many of the fee-based ones require that top of the line systems be used. This does not even include those who are not Windows users. Aside from the Macintosh operating system, there are a few others that many students may be using.
- Who, from the librarians, will be responsible for the service?
  - o Someone must be responsible for this service. Many libraries hire someone specifically to run this service, but I doubt our budget will allow this. We have to consider if one of us is to run the service or if anyone who has hours at the reference desk will cover virtual reference while at the desk.
  - o Even if only one of us takes charge of the service, there must be training provided. How much training will depend on the software we select. The free ones will not require a lot of training due to the lack of extra features. The more features we want, the more training we will have to do.
  - o There will also be a need to make sure our students can use the service and thus will need to be trained in some way depending on the software.
- What hours would we offer
  - o Every library does this differently. Some do choose to make it 24/7 reference services while others choose to do it for the hours the library is open, but the reference desk is closed. Others even do selected hours while the library is open.
  - o We have to decide if this is going to be just another way for patrons to contact us or is it going to supplement the current reference services we have? When would our patrons benefit from having the virtual reference available?

To consider

### 1)24/7 service

- a. This would require that we have someone to monitor the service all day and night. The best way to do this option would be to have chat monitored by the person at the reference desk and then hire someone to monitor it at night, until we open again. This will allow us to offer patrons with assistance at their need and during our off hours.

### 2)Off Hours service

- a. This would give us a chance to make sure there is some kind of reference service available the entire time the library was open. It may even allow us to cut back on how many hours a reference librarian is actually at the desk on evenings and weekends. We may not have to hire someone to do this. We could ask any of the current librarians to help cover this or one specific librarian to cover this. We would have to

make sure the librarian had a computer that was compatible with any system requirements though and may require that there be a dedicated library laptop that could be taken home by the librarian.

3) In addition to current reference

- a. This would allow us to give patrons another option for contacting us during reference hours. It could be maintained by the librarian at the reference desk and would simply require that he or she keep the service open while at the desk. Priority would have to be determined for these questions so that users would know how likely they are to get a reference librarian right away. We would have to make sure each librarian knew how to use the software we chose to do this with.

4) Specific hours

- a. Having specific hours when people could access VIRTUAL REFERENCE would make maintaining it easier for us. It would allow us to have one librarian, probably not the same one at the reference desk, maintain the VIRTUAL REFERENCE for a set number of hours. It would, presumably, be done from their personal desks (assuming they had the correct OS) and would allow them to work on other things if there is any downtime. I do not know if people would be willing to wait for reference just to use the virtual reference, but it may make another option available to people when the librarian at the desk is busy with something else.

5) Free chat services (AOL, MSN, Yahoo)

- a. The nice thing about these services is that they are free for use by anyone. We can set up a free account and anyone who has an account can send a message to us for help. Also, on many of these systems, you can easily note if you are away from the desk or idle. Messages can be left for people when you are labeled away as well. Chat can be done in groups as well rather than just one on one.
- b. Another positive is that many of our traditional students are already familiar and have at least one type of free messenger program. Other libraries are started using these services and found the results to be very good.
- c. There are some negatives about this as well. First, there is no standard software. Not everyone uses AOLIM or Yahoo's IM. People must have an account with the correct company to use their software. By choosing one software we eliminate anyone who doesn't use it. Also, we have already have a policy that states people can not use IM programs on our computers. By allowing students to use it for Virtual Reference we also have to assume they are going to use it for their own personal use. A possible solution to this problem may be creating separate accounts for each computer in the library and having it automatically log into these accounts when the software is started. People will find a way around this, but we can have a bit more control this way.
- d. Another negative about free software is the extras that come with it. You can simply chat with the person and follow along, but it's the same as talking to them on the phone. From the articles I read, phone calls seem to work faster than Virtual Reference as typing takes longer than speaking on the telephone.

6) Fee based services

- a. There are a lot of great options that come with the services you pay for. For example there is the option to co-browse push pages which allows you and the patron to see the same exact thing at the same exact time and for you to show a patron something specific that may help them. Many also allow you to customize the look of your service and get use statistics. Many will also allow you to have emails sent with questions when a librarian is not available to answer them.
- b. The problem is that these services can get very expensive and the more we want, the more we will pay. At the very minimum one vendor will charge \$25 a month and each feature adds between \$5 and \$150 to the bill.

7) Sharing the Cost

- a. We may want to look into the option of doing this with a group of libraries or with the entire college. This will not only take the burden of cost off of us, but it will also take the staffing burden off of us as well. It will not require that we be the ones to constantly maintain it as well.

- i. Making the VIRTUAL REFERENCE for the school, but having the library run it is an option. UN-Reno did this and has a “live chat” button on the University’s main and contact pages. This was in addition to their library based “Ask a Librarian” VIRTUAL REFERENCE. It is unclear who pays for the service, but we may be able to get IT to consider adding it with our help.
- ii. MassAnswers may provide us with an opportunity to participate without having to pay for anything thanks to CMRLS. This may even eliminate our need to have to staff it unless we want to.  
[http://www.cmrls.org/resources/tech\\_resources/index.html](http://www.cmrls.org/resources/tech_resources/index.html)
- iii. The problem with this is that they can not get specialized service from us. If most of our questions are regarding our library’s technology issues then they will not be able to get help without calling us specifically.

What can we do aside from Virtual Reference?

- 1-There are other things we can consider adding in the place of VIRTUAL REFERENCE. For one, we can make our email reference more widely known at the school. Possibly placing the link visibly on the webpage and creating a quick reply policy that says we will get back to a person within 24 hours or something like that (even if it’s just to let them know we are working on something for them).
- 2-We can also consider creating a FAQ page that answers some of the standard questions we get and make that available via the web. We know many of the questions we are frequently asked and I think it would be easy for us to create something like this.

My Suggestion:

I think we should seriously consider using the MassAnswers service for our library patrons for the time being. Since this state service already exists I don’t think we should worry about any consortium options. This is already free for us to use and there are no requirements from us to help pay or to participate as librarians. Patrons may not be able to ask about our specific services, but it will provide them with general reference assistance. I also feel we should seriously consider the instant messenger software options. Waving our current policy for the software is not going to be difficult, as we do not currently enforce it. This would allow us one more way to connect with our patrons and provide library specific help. This may also be an easy way to improve our summer shut down situation. We may want to consider letting some of us provide virtual reference from home or from other computers. This will allow us to provide some kind of reference service while the physical building is closed.

Finally, we should look into how we can make the email reference option more visible and think about creating a FAQ option. We are hoping to redesign the webpage anyway so this is a good time to do this. Many other libraries make these options clearly available on their web pages. We will also need to set up a policy on what we will provide, how long it will take us to provide responses, and other important information about virtual reference.

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