

McConnell Funding Project Final Report

A Digital Reference Service for a Digital Library: Chat Technology in a Remote Reference Service

**Submitted May 15, 2002
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Objectives

The objectives of the Library's McConnell¹ project were two fold:

1. To pilot an innovative chat-based library reference service, to meet the research, learning and information needs of off-site Ryerson students and faculty.
2. To enhance the teaching and learning environment of Web-based course delivery.

Rationale

As the Ryerson Library makes more digital resources available over the Internet, research is increasingly being conducted outside the Library. In addition, the University's substantial commitment to distance learning and Web-based course delivery offers the Library opportunities to rethink and redefine its role in this rapidly evolving academic enterprise. An ongoing concern in this expanding digital milieu is that library users navigate our information systems successfully regardless of where they are working. In the past, reference service has involved on-site service and local telephone support, designed to instruct and assist library users in their research endeavours. Now, digital reference is becoming an important remote service, as ever growing numbers of library users are learning and researching at a distance. This project addressed this trend by piloting a real-time, chat-based reference platform to meet the learning, research and information needs of off-site Ryerson students and faculty.

Project Implementation Team

Principal Investigator: Diane Granfield, Head of Reference

Partners: Liz Bishop, User Services Librarian
Bob Jackson, Systems Librarian
Don Kinder, User Education Librarian
Susan Patrick, Collections Librarian and Distance Education

Digital Media Projects Office: Wendy Freeman, Media Production Coordinator.

Distance Education: (future partnerships, see section on *Parameters and Time Frame of the Pilot Project*, below): Richard Malinski, Director of Open College, Wendy Lowe, Instructional Designer.

Digital Reference Service: a definition

The short definition of digital reference is the provision of reference service over the Internet. The term for digital reference has taken many forms: digital, virtual, chat, on-line and real-time, to mention a few of the more popular names. A term that we have considered more recently,

¹ The use of the term "McConnell" implies the J.W. McConnell Family Foundation, from which the Library received partial funding for the project described here.

distributed reference services, captures best the notion that the modern day library, to a great degree, is a web-based learning environment. The lines between on and off-campus students and courses are blurring as technology is incorporated into all aspects of education. To expand the boundaries of current reference service, from the Library's point of view, is a natural outcome of both our commitment to digital resources and remote access, as well as the University's commitment to *distributed* learning. That said, this report will use a number of different terms in describing digital reference activity.

In recent years, the Library has explored various means of providing web based assistance and instruction to our users, and has offered an email (asynchronous) reference service since the fall of 1999. The McConnell project involved the provision of a digital reference service by offering personal assistance in real-time (synchronous) through the use of web based interactive software. This new chat service is called Ask a Librarian Live.

Digital reference differs from traditional reference in two fundamental ways. First, there is a disconnect between the user and the physical space of the library. Second, digital reference creates artifacts of the exchange between librarian and user. That is, the transaction can be recorded in terms of the content of the interaction, the resources used, the time it took, the time of day it took place, the librarian involved, the general location of the user and a number of other quantifiable variables.

The (r)evolution of Ask a Librarian Live at Ryerson

“It's time to put a human face on the virtual library. What's the crucial factor in the success of the non-virtual library? The people who work there and serve the user! What do libraries emphasize on their Web sites? Resources, collections, facts with no human guidance or presence! On many library Web sites, the user is hard-pressed to identify the staff, whose names, if they're there, are five levels down. The human factor is still important.”²

Although the Ryerson Library turnstile counts and circulation figures have shot up from last year, many students opt to do much of their research away from the Library or campus. The Library's considerable investment in electronic resources, as well as the growth in size of distance and web-based learning methods, has meant a steady increase in the use of our licensed databases, library catalogue and other resources, from home, office, student residences and the labs. The culture created by the pervasive use of the Web is one of convenience and speed. Coupled with an increasingly computer savvy student body, our users both welcome and expect services delivered on-line.

To address these realities, the Library has developed a number of proactive, innovative and flexible approaches to providing reference services. In addition to email reference, the Library offers online library research tutorials, web-based subject guides, an FAQ page, and a telephone

² *Technology and library users: LITA experts identify trends to watch. Library and Information Technology Association.* (Accessed May 9, 2002, <http://www.lita.org/committe/topotech/trendsmw99.htm>)

call centre. The launch of the Library's chat-based reference service, Ask a Librarian Live, gave us the opportunity to revamp our Ask a Librarian page (<http://www.ryerson.ca/library/ask.html>), with the help of the Digital Media Projects Office (DMP). This new and improved page was a clear statement to our users about viewing reference services in both a multifaceted and holistic way: face to face, in-class instruction, email, chat, phone and web based pathfinders, all in one conceptual framework: *wherever you are, whatever way works best for you, we will be there to help.*

By following our users into cyberspace, the librarians are able to maintain a crucial, even central role, in contextualizing the vast and disparate landscape of web and print-based information available to information seekers. "By using digital reference to put a human face on the library and developing library learned skills ... the library can be defined not just as an access point or a content aggregator. Its all about context."³

Ask a Librarian Live: the software

After some deliberation and exploration, the Library decided on acquiring software that provided the highest level of interaction with our users *and* resources. The buzz in the digital reference world is about providing "high tech with high touch." The software we acquired is in fact not considered *chat* but *web call centre* software and it differs from chat platforms in a number of ways. The most significant difference is the ability to co-browse web pages while conversing (chatting) via text with the user. The librarians considered this feature important because it gives us the ability to assist users "inside" licensed databases. That said, we encountered considerable problems with co-browsing our licensed databases and the issues are summarized in detail in Appendix 1.

The software we acquired is called VRD – Virtual Reference Desk, and is a product of the company Library Systems and Services Incorporated (LSSI). LSSI is unusual in the web based call centre business in that it is a company made up of librarians and has supported the library community for the past 20 years in the provision of automation based products and services. While web call centre software is a relatively new activity for the company, the product has become tremendously popular in the library community. LSSI's VRD is the software of choice for many of the synchronous digital reference services currently being offered in North America. Of the ten digital reference initiatives in Canadian universities, six are running on LSSI. Ryerson was the first Canadian library to sign with LSSI.

The software features are as follows:

- Private, secure communications between users and librarians
- Complete session transcripts, including URLs, emailed to both the users and the librarians at the end of each session

³ R.D. Lankes, "Using digital reference to rule the world". Teleconference to Washington State Library Grant Kickoff, Syracuse, New York, State of Washington, 2001. (<http://quartz.syr.edu/rdlankes/presents.html>)

- Queuing features which let users and librarians know how many people are waiting to be helped
- “Push” technologies allowing librarians to send Web pages directly to users’ desktops.
- Co-browsing capabilities allowing users and librarians to follow each other’s progress through a database or Web site
- “Meeting room” features allowing for group instruction
- Customization of the software
- Statistical reports
- Secure protected access to session transcripts and patron information
- Operate on the library’s current hardware configurations and require no special technologies on the users’ end.
- 24/7 technical support
- On-site training for librarians

LSSI licenses the use of the VRD software on a per “seat” basis, at a cost of \$6,000 U.S. per year for one seat. The Library acquired one seat which means that one librarian at a time is able to service the Ask a Librarian Live “desk.” Installation and training costs were a one-time-only fee of \$8,000 U.S.

Parameters and Time Frame of the Pilot Project

The Library acquired the VRD software in the spring of 2001. The librarians were trained in May on site by an LSSI trainer. Testing and service considerations were worked through during the summer. An official launch date in September was moved back to October when software and network problems surfaced. Problems continued into October (see Appendix 1) and had stabilized by the end of the month. What became clear is that moving to the *Interact* version of the software – which would allow the co-browsing of licensed databases – would have to be placed on hold for what turned out to be the duration of the pilot.

These issues changed both the time frame and the nature of the pilot project. The initial pilot project was to span the fall term. The McConnell working group decided to extend the pilot until the end of March in order to collect enough data to make a useful evaluation. The software was relatively stable for the duration of the pilot and the evaluation and assessment were done in the spring of 2002, rather than the winter.

Because of the focus on software and reference service provision, making significant inroads into web-based classroom environments, while an expressed goal of the McConnell proposal, was postponed until the fall of 2002. The software has a “meeting room” capability which was hoped could provide library group instruction on-line. This will be tested in the fall of 2002 with the commitment of one professor for a course on research methods in the School of Disability Studies.

Service Provision

Hours

Hours were based on current availability of staff and resources and not on what we considered were the ideal hours for our digital reference service. It is our expressed belief that evening and weekend reference service hours are compatible with 24-7 access to our resources. The pilot offered the following fall and winter terms: Monday through Thursday, 11 a.m. to 5 p.m. and 7 p.m. to 10 p.m.; Friday, 11 a.m. to 5 p.m. The service was closed Saturday and Sunday

Who can use the service?

The service is intended for Ryerson students, faculty and staff and other affiliates of the university. In reality, anyone can use the service, since no authentication is required. By the nature of the questions asked (see evaluation section), most of our users were Ryerson community members.

What sorts of questions can be asked?

There are no limitations to what can be asked of the service except we “reserve the right to refuse to answer questions we find offensive and inappropriate (profanity, racial epithets) and intrusive personal questions.”

Technical Problems

Users are given guidelines on handling technical problems.

Privacy Issues

Privacy is an important consideration in a service of this type. A policy outlining what sort of information is collected and how it may be used, etc. was devised. See Appendix 2.

Staffing and Training

The Ask a Librarian Live seat was serviced by fourteen librarians. The Library’s evening librarian worked the digital reference service from the reference desk from 7 p.m. to 10 p.m., Monday through Thursday. The thirteen other librarians staffed the digital reference seat from their offices. This allowed the librarians to work at other tasks and be available to answer questions. The software notifies the librarian with a single bell sound when a patron has signed on. Besides the evening librarian, whose hours were three hours for each day the service was open, the rest of the librarians worked approximately 2 hours per week in addition to their regular reference desk hours.

On site training occurred in May of 2001 by the vendor, in a one and half day intensive session. The Librarians practiced amongst each other during the summer. Two retraining/refresher sessions were set up during the fall and winter terms. Library Technicians, who also work on the in-house Reference Desk, were invited to assist with training by simulating sessions. Informal training and “tip sharing” occurred throughout the trial. The Library staff as a whole were given a detailed information session on the Ask a Librarian Live service.

The interesting training tension in a new area like digital reference are the dual concerns of technical training on the one hand and quality concerns regarding the provision of reference service on the other. We cannot make an assumption that a librarian who has effectively worked in reference for 10 years, will automatically be able to put all the same skills and knowledge to good use in the digital reference arena. While the training provided by LSSI covered this ground, to some extent, in their manual and in the session provided, over the next year as we move into our second year of service, more attention will be paid to process and quality outcome measures. Now that the field is moving from innovation to “best practices” there is a lot of activity and study in the library community based precisely on these issues. For example, at this June’s American Library Association Conference a session conducted by the Reference and User Services Association is entitled, "Reference Interview: Connecting In-Person and in Cyberspace."

A recent study, which summarized site visits to a number of U.S. libraries offering digital reference services, noted that digital reference staff felt that “a range of additional training in areas such as conducting online question negotiation, using a combination of online and print sources interactively ... need attention as well. ...They were also quick to point out that most schools of library and information studies offer virtually no training/education in this area.”⁴

Promotion

The McConnell group planning the pilot felt strongly about offering the service during as many hours as possible and promoting it intensively for the test period. We did not take a timid approach. Given all of the energy and expense involved in setting up the pilot, we wanted to reach as wide a user population as we could. The marketing campaign especially on our posters and bookmarks stressed convenience: “Librarians do house calls, Online!” and expertise: “Professional librarians are available to offer expert assistance in real time while you’re engaged in research online.” (see Appendix 3) The press release detailed a wide range of issues relating to the service (see Appendix 4).

The following is a list of promotional activities:

- Press release sent to the student newspapers (The Ryersonian and the Eyeopener), the university newsletter (The Forum), student services, Teachnet and Researchnet, the Ontario Library Association, Canadian Library Association’s magazine, Feliciter.
- Article in The Ryersonian, October 31, 2001 (Appendix 5)
- Announcement in the The Forum
- Article written in the Library’s newsletter Nexus, December 2001 (See Appendix 6)
- The Ask a Librarian link was placed on the Web CT pages of the following courses: Business 100, CFNN 111 Nutrition for Nurses, ITM 101 Personal Productivity, DST 088 Research methods in disability studies

⁴ Melissa Gross, et al. “Assessing Quality in Digital Reference Services, Phase 2: Site Summary Report.” <http://quartz.syr.edu/quality/VRDSiteVisitsummary.pdf> (accessed May 11, 2002). pp. 6-7.

- Poster for wide distribution – placed in student labs and campus residence foyer and around the library.
- High profile signs in the Reference Desk area
- Bookmarks
- Promotion during 2 months in the Fall over the Library’s main splash page
- 2 month display in the Library’s lobby display area.
- Redesigned web page for Ask a Librarian services prominently linked from the Library main splash page
- Ask a Librarian Live “button” on a number of web pages over the Library’s web site, including the Research Guides.
- Links from the Ryerson University web site
- Heavily promoted in the library orientation and instruction sessions offered in the fall.

Ask a Librarian Live: data collected

A number of statistical measures were taken using the report capabilities of the software in order to give us some insight into when and how the service was being used. Since the service was only open for about one week in December of 2001, this month was excluded from the report data. The 308 sessions that were used in most of the tabulations represent sessions deemed “real” sessions. Sessions that were test interactions or duplicated by the report utility of the software were excluded.

When is the service being used?

Table 1 shows sessions by month. The real-time service in the short period of time it has been offered met and in some instances, surpassed our email reference service, a service that has been in operation for two academic years. It is also interesting to note that email reference doubled in the Fall/Winter 2001/2002, attributable, it is assumed, to our revamped Ask a Librarian page and the promotion surrounding Ask a Librarian Live.

For Ask a Librarian Live, service levels peaked during the peak library usage months of November, February and March. The email reference service provided back up to the service when the hours were considerably reduced in December and January. Email sessions were 47 and 93, respectively, for these two months.

Given that the Ask a Librarian Live service was more heavily promoted in the fall term, especially through library instruction sessions, the peak month is still February. The service continued to build its user base most likely through word of mouth, repeat users, posters in the Library and web page placement of the Ask a Librarian page. Usage also reflects software problems in the fall. Since we had difficulty with the software in September and October it is hoped and expected that these months in 2002, especially October (a peak month for in-house reference service) will show high demand. Table 2 breaks down the monthly activity by showing sessions by week. It is very interesting to note that the second busiest week was Reading Week.

Table 3 illustrates a very gradual slide in the use of the service from Monday to Friday. Given that the service is not open in the evenings on Friday, it could be said to be steadily in demand each day, with the demand slightly higher earlier in the week, especially Monday. Does the Monday group represent a core of users who would have preferred to contact us on the weekend, but we were not available? Statistics for the Alliance Library Group, a consortia of academic libraries in Illinois, show a similar usage pattern in days of the week. In addition, since they are open 24-7 they are able to show that their slowest days *are* Saturday and Sunday. That said, there was still significant use made of their service during these days and is something for us to consider for the future. (see www.lis.uiuc.edu/~b-sloan/r4r.final.htm).

Table 4 tells us that daytime use of the service is greater than evening use and that the service is used steadily throughout the day. Peak hours were 11 a.m. and 2 p.m. 78% of our inquiries occurred between 11 a.m. and 5 p.m.; 22% from 7 p.m. to 10 p.m. If we were open from 5 p.m., or until midnight, would the split be more even? Clearly evening hours are important to our users.

What type of questions were asked?

Table 5 outlines the type of questions being asked of both our Ask a Librarian Live service and our email reference service. It is useful to compare the two services because as it turns out, the type of questions asked differs to some extent. *Reference* questions are considered any question that involves catalogue information, research strategies, factual information and database questions. *Borrower Information* involves queries that relate to library cards, circulation information, fines, etc. *Technical Assistance* as a category largely concerns how users connect to the Library from home. Otherwise known as “proxy questions”, these users require assistance with how to set up their home computers to access the library’s licensed databases. The *Other* category ranges from library policies to university related questions.

The majority of questions asked of our Ask a Librarian Live service were reference in nature, 56%, and the next largest category was technical assistance at 24%. In contrast the majority of questions asked of our email service involved technical assistance, 43%, with reference queries running at about 30%. Both services responded to borrower information queries at the same rate, about 13%.

What is it about the Ask a Librarian Live service that encourages more reference questions? Is the effort involved in a chat based platform such that users tend to ask more complex questions? Certainly the software provides librarian and user with the potential of a rich and complex exchange relative to asynchronous, email questions. Appendix 7 contains the question logs for the length of the pilot project.

Who used the service?

Since the service was available to both Ryerson and non-Ryerson users, it would be interesting to know how many users were not affiliated with the university. Unfortunately, because of the widespread use of email providers that are not part of the University system (e.g., hotmail), we cannot use the report functions of the LSSI software to any useful degree in this regard. The

survey that is reported on in the next section, gave us some glimpse as to who used the service in terms of their status (undergraduate, graduate, staff, etc.).

Where were our users when they accessed the service?

Table 6 shows where people were when they accessed the service. Using IP addresses (the address of the Internet provider) the report software can tell us whether users were in the Library, on campus but not in the Library, and off campus. We can assume that the *in Library* figures are the most inflated since a number of these sessions were test sessions between librarians. Because of the IP address complexities, the totals are much larger than the other tables – we did not adjust the figures for non-sessions (test sessions between librarians or between the library and LSSI and duplicated sessions). Nevertheless, we know that the majority of our users accessed the Ask a Librarian Live service from off campus. A significant number (13%) were on campus but outside the Library, meaning that patrons accessed the service from offices or labs.

**Table 1. Ask a Librarian Live and Email Reference Sessions by Month
(Nov. 2001 – Mar. 2002)**

	Ask a Librarian Live	Email Reference	TOTALS
November	87	80	167
January	43	93	136
February	97	79	176
March	81	88	169
Total	308	340	648

Table 2. Ask a Librarian Sessions by week, Nov. 2001 – Mar. 2002

Nov. 11 –17	21
Nov. 18-24	22
Nov. 25-30	22
Jan. 7-13	12
Jan. 14-20	9
Jan. 21-27	14
Jan. 28 – Feb. 3	9
Feb. 4 – 10	32
Feb. 11 – 17	14
Feb. 18 – 24	23
Feb. 25 – Mar. 3	28
Mar. 4-10	20
Mar. 11-17	20
Mar. 18 – 24	17
Mar. 25- 31	16

Table 3. Ask A Librarian Live Sessions: Day of Week (Nov. 2001-Mar. 2002)

Monday	85
Tuesday	66
Wednesday	64
Thursday	58
Friday	36
Total	308

Table 4. Ask A Librarian Live: Sessions by Time of Day (Nov. 2001-Mar. 2002)

11:00-12:00	45
12:00-1:00	40
1:00-2:00	33
2:00-3:00	43
3:00-4:00	42
4:00-5:00	36
7:00-8:00	30
8:00-9:00	25
9:00-10:00	14
Total	308

Table 5. Ask A Librarian Live and Email Reference Sessions: Question Type and percent of total in brackets (Nov. 2001-Mar. 2002)

Type of Question	Live Session	E-mail	Total
Reference	173 (56%)	101 (30%)	274
Borrower Information	39 (13%)	45 (12%)	84
Technical Assistance	73 (23%)	147 (43%)	220
Other	23 (8%)	47 (13%)	70
Totals	308	340	648

Table 6. Ask A Librarian Live: Sessions by IP Address (Nov. 2001-Mar. 2002)

Library	89	20%
Campus	61	13%
Off Campus	291	67%
Total	441	100%

Ask a Librarian Live Survey Results

Each person that used the service throughout the pilot period was sent a web-based survey within a week of using Ask a Librarian Live. The survey was devised by the project librarians and designed and mounted by the DMP. Appendix 8 is a copy of the survey. The survey was an attempt to uncover a number of variables: status of user, how well the service addressed their needs, overall satisfaction, how easy the software was to use, how they found out about the service, what other Library reference services they have used, and why they choose to use the service. Survey respondents also included comments and these are printed in full in Appendix 9. Wendy Freeman of the DMP assisted with the tabulation of data.

The response rate was about 26% of the total number of sessions/users. 81 people responded and the totals for “real” sessions were 308. By far the majority of people who used the service and who responded to the survey were undergraduates. Table 7 summarizes the status of the respondents.

The questions that rated satisfaction were generally positive. 60.5% of respondents felt their answers were answered well or very well and 17.3% felt they were not answered well. Not surprisingly the numbers were similar for overall satisfaction: 63% were satisfied or very satisfied and 16% were mostly not. 77.8% of the respondents felt the software was easy to use and 9.9% felt it was not very easy.

Given that we experienced software and network problems on and off throughout the trial and were not able to co-browse databases, the satisfaction levels are not surprising. Under better conditions we think they would have been better. This was a pilot, after all, and there were a number of implementation challenges. The interesting thing to note, is that we do not have satisfaction figures for in-house reference desk service – so whether satisfaction with the Ask a Librarian Live survey is low or average, is difficult to say. That almost 78% of users found the software easy to use, reinforces one of the reasons we decided to go with the LSSI software – it is user-friendly.

Table 8 tells us how users found out about the service. 66.7% of respondents found the service on our web site. Library instruction sessions and the reference desk were the next highest categories at 11% and 12% respectively. The lowest were via professors or web course pages. These latter modes of promotion should be considered as development areas.

Table 8 tells us what other reference services the respondents have used. Almost 60% have used the reference desk and a significant number have also used email (21%). That the email users were crossovers to chat is quite likely given an assumed comfort level with this type of online service. The most interesting figure is that almost 25% of respondents had never used reference services. Ask a Librarian Live is tapping into a group of users we would otherwise never have interacted with. This is precisely the sort of outcome we hoped to achieve and it points to an important growth area for reference services.

The comments left by survey respondents (see Appendix 9) were, for the most part, very positive. There were a number of very glowing statements: “Great idea!” “Very helpful staff –

love em!” “The online service is amazing and I’ve come to rely on it.” “Excellent service idea. Keep it up.” But for all the great comments, there are a small but significant number that were not positive: “Overall, I like the idea, but the response time was a touch too long” “No one responded to my question” “I found the service to be slow”. These latter comments reflect the software and network challenges during the pilot and we only hope that we have not lost users – that the disappointed students will give us a second try. The promotional service in the fall 2002 term, given that the system issues will be resolved, should include in some of the literature: “New and improved”.

Table 7 :Survey Question No. 1 – User Status

User Type	%
Full Time Student	63.8
Part Time Degree Student	6.3
Continuing Education Student	7.5
Graduate Student	2.5
Distance Education Student	2.5
Faculty	6.3
Staff	1.3
Other	10.0

Table 8:Survey Question No. 3 – How Did You Find Out About The Service?

How did you find us?	%
Library Website	67.5
Library Display, etc.	10.0
Library Instruction Session	11.3
Professor	2.5
Course Website	2.5
Reference Desk/Library Staff	11.3

Table 9:Survey Question No. 4 – What Other Ryerson Library Services Have You Used?

Type of Service	%
Reference Desk, In Person	58.8
Email Reference Service	21.3
Telephone Reference Service	11.3
None	25.0

Conferences, Presentations, Publications

1. **10th Annual Ryerson Faculty Conference.** May 16, 2001. “*The Digital Reference Desk: Live Online Assistance Comes to the Library*”. Diane Granfield and Bob Jackson.
2. **6th Meeting of the World Criminal Justice Libraries Network.** Zutphen, Netherlands, May, 2001. “*I Can’t Help Myself, Can You? Virtual Reference Services*”. Cathy Matthews.
3. **McConnell Project Meeting with Tim Brodhead.** October 30, 2001. Project Highlights presented by Diane Granfield.
4. **Ontario Library Association, Super Conference.** February 2, 2002. “*Virtual Reference Desks – Going Digital*”. Diane Granfield (Ryerson) and Jenny Marvin (University of Guelph).
5. **Ontario Council of University Library Directors.** April 8, 2002. “*Virtual Reference Collaborations and Consortium Planning for Ontario University Libraries.*” Diane Granfield and Jenny Marvin (University of Guelph).
6. **11th Annual Ryerson May Conference.** May 15, 2002. Poster Session. “*The Virtual Reference Desk – Ask a Librarian Live.*” Diane Granfield, Bob Jackson, Don Kinder, Susan Patrick.
7. **Proposal submitted to 4th Annual Digital Reference Conference, November 11 and 12, 2002, Chicago, Illinois.** “*Real Time Digital Reference Consortia and the University Community: Challenges and Opportunities.*” Diane Granfield, Jenny Marvin (University of Guelph) and Mark Robertson (York University).
8. **Ontario Library Association, Super Conference, January 29-February 1, 2003, (proposal accepted).** “*Collaborative Virtual Reference Services: the future of VR*”. Diane Granfield, Jenny Marvin (University of Guelph) and Mark Robertson (York University).
9. Diane Granfield. *Reference Services in a Digital Environment: CHAT goes academic – meeting library users at point-of-need.* **Nexus: A Ryerson University Newsletter Produced by the Library** Issue No. 13/December 2001.
10. Cathy Matthews and Susan Patrick. *Ask a Librarian Live: Specialist and Broad-based Reference Capacities: Expanded by New Software.* **College and Research Libraries News** 63(4) April 2002, pp. 280-281.

External Linkages and Partnerships

A very exciting outcome of the Ask a Librarian Live pilot project has been the role the librarians and the service have played in the vanguard of real time virtual reference services within the library community in Canada. The external linkages developed fall into three categories: Networking and Advisory; International; and Collaborative Projects.

1. **Networking and Advisory.** Due to the newness and innovation of real time virtual reference services, a great amount of interest has developed in the library community in the past year. Because the Ryerson Library’s Ask a Librarian Live service is one of the first being offered in this country, we have been contacted by a several libraries for site visits. A group of librarians from York University and Toronto Reference Library visited the Library in June 2001 to discuss our experience and decisions regarding virtual

reference. Both York University and the Toronto Public Library have since launched their own real-time digital reference services. University of Toronto has met twice with librarians from Ryerson in the past year regarding planning a virtual reference service.

Much networking, problem solving and inquiry has taken place in person, by phone and over email in the past year with a number of universities from across the country: University of Victoria, University of Winnipeg, University of Alberta, University of Guelph, University of Waterloo, York University and the University of New Brunswick. All the aforementioned universities, except University of Alberta, have contracted with LSSI.

Diane Granfield attended the Virtual Reference Conference in November of 2001, where some of the above mentioned universities were represented as well as a large number of American libraries. She was also invited to attend a small gathering of Canadian librarians in Ottawa, sponsored by the National Library, entitled the "Canadian Digital Reference Forum," in May 2002. This was a particularly useful meeting as it allowed a lot of face to face discussions about initiatives across the country.

- 2. International.** In many university communities, there is now not only a desire, but a demand, for 24-7 virtual reference service to complement the 24-7 catalogue and database access offered by most university libraries. Most libraries do not have the staff to provide this service alone. This demand has led to the idea of international partnerships in different time zones. The Ryerson Library is currently investigating the possibilities of partnerships with Australian university libraries for future phases of the virtual reference project.

In May/June 2001, Susan Patrick, Distance Education Liaison Librarian, visited Australia as part of her professional leave. Her mission was to demonstrate *Ask a Librarian LIVE*, in its trial stage, in interactive reference interviews with a librarian at Ryerson, and to discuss potential partnerships. The time difference between Toronto and Australia (Australia is 14 to 15 hours ahead) makes Australian libraries ideal partners for Ryerson Library for nighttime reference in both countries. Ryerson librarian Joan Parsons also conducted a demonstration at a New Zealand university in December, 2001.

One of the universities visited, RMIT Library in Melbourne, is now ready to acquire software and set up a service. Susan Patrick is going back to Australia this summer and will further develop the potential for virtual reference partnerships.

Presentations/demonstrations by Susan Patrick:

RMIT University Library, May 23, 2001, Melbourne, Australia.

University of Queensland Library, June 7, 2001, Brisbane, Australia.

"Virtual demonstrations" of Ask a Librarian Live from Toronto to:

City of Cairns Library, Queensland, Australia, December 12, 2001

University of Southern Queensland Library, Toowoomba, Australia, September 19, 2001

University of Queensland Library, Brisbane, Australia, September 17, 2001
University of Southern Queensland Library, Toowoomba, Australia, June 25, 2001

- 3. Collaborative Initiatives.** Closer to home and also collaborative in nature is the development of a planning group among Ontario university libraries to test the viability of a virtual reference consortium. Ryerson, the University of Guelph and York University will form the nucleus of this exciting and innovative initiative. Diane Granfield and Jenny Marvin of the University of Guelph made a formal presentation to the Ontario Council of University Libraries Directors meeting in April, 2002. The presentation was intended to give background information on the digital reference services currently available in the province and to propose partnerships to both save costs and to consider the viability and logistics involved in sharing staff and resources. The OCUL Directors agreed to support a planning group – a fledgling committee – to take these ideas to their next step. Along with representatives from Ryerson, York and Guelph, a number of other Ontario university librarians will attend the first planning meeting at the University of Western Ontario on June 4.

University of Victoria and Simon Fraser are planning to collaborate on digital reference services. But in terms of the scale of collaborative ventures, the Ontario initiative will be a first in Canada. There are a handful of digital reference consortia in the United States and only one – in Illinois – is made up solely of academic libraries. The Illinois project is made up of a number of universities and colleges which share common digital resources and is relatively speaking on a much smaller scale than what the Ontario group is planning. In addition, the Ontario libraries will need to grapple with a tremendous diversity of interests in planning for collaborations. All in all, very exciting challenges ahead!

Recommendations and Future Considerations

- Renew our contract with LSSI, while exploring other software products on the market.
- Continue to pressure LSSI to make improvements to the software and respond to our specific site problems. The ability to exploit the co-browsing feature is the key to offering the best that digital reference has to offer at this time.
- As an overall training initiative within the reference department, focus on service quality issues. In terms of the Ask a Librarian Live service, consider librarian “fit” with digital services and best practices for interacting online in terms of behaviours, skills and resources. Evaluation of transaction logs will be undertaken this coming year.
- Survey librarians on their experience with the software.
- Make improvements to the user survey for the fall re-launch of the service.
- Overall: increase focus on evaluation and cost-benefit considerations.
- Given the amount of technical questions regarding the proxy server, on both the real-time and email reference services, the Library needs to move over to Ezproxy ASAP.
- Pilot virtual library classes using the meeting room function of the LSSI software.

- Develop slide shows to improve the one-on-one interaction with users.
- Collaborate with other Ontario universities in digital reference services.
- Continue to explore collaborations in Australia.
- Continue to intensively promote the service, especially to professors and students in Web CT environments. Place the Ask a Librarian link on the Library's web site wherever we think users may need our help. Investigate putting links to Ask a Librarian Live inside licensed database interfaces.
- Develop privacy standards that tell us how long to keep information and when to have data purged.
- Make inroads in distance learning classrooms; formalize a relationship with Open College in this regard.
- Consider avenues to fully integrate digital reference services within the institution as a whole and the reference department specifically.
- Present at and attend related conferences and gatherings – stay connected! This is a very collaborative field.