Collaborative Librarianship

2010

The Only Constant Is Change: A Narrative on Ten Years of Collaborative Chat Reference Service at San Jose Public Library

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Abstract

This article documents and highlights the evolution of collaborative, web-based chat reference service at a large metropolitan public library from 2000 to 2010.

Introduction

The San Jose Public Library (SJPL) has provided collaborative chat[1] reference service from July, 2000 through June, 2010. The service has continually evolved in terms of vendor, software, access points for library patrons, coordination in marketing and staff training, and extent of library collaboration.[2] The following is a glance back at highlights and challenges of providing this service for ten years.[3]

Preface: Experimenting in 1995

When the University of Michigan's Internet Public Library (IPL) opened its digital doors in April, 1995, it featured an educational multi-user, object-oriented environment (MOO) that quickly attracted a small group of librarians from the United States, Canada, and throughout the world. Fascinated by the ability to "chat" with each other in real-time and to help develop a descriptive text-based environment via telnet (as opposed to the World Wide Web), a group of librarians volunteered to assist a graduate student in providing library reference service from the IPL MOO.[4] In effect, this experiment was a precursor to Web-based chat reference services that emerged about five years later.

2000: Pioneering

In July, 2000, twenty reference librarians from ten San Francisco Bay area libraries gathered in San Jose for a software training session sponsored by three regional library consortia. The meeting, facilitated by Steve Coffman of Library Systems and Services, Inc. (LSSI) and the late Anne Grodzins Lipow of Library Solutions Institute & Press, presented cutting-edge software by eGain Corporation. The software was based on technology used by web-based commercial contract centers, dubbed the Virtual Reference Desk, and marketed to libraries. Initial training was intensive, as few librarians had experience with online chat environments. Ms Lipow opened the session by saying, "It's an absolute *thrill* to be here today." Elaborating on a prior memo she had sent to workshop participants which noted that virtual reference service represented a major shift from traditional library reference service toward "dot-com services," she addressed the increasing convenience of the internet for library patrons. Web resources such as FAQs, links of local interest, self-developed reference tools, and email reference were serving special interest groups "where they are." She added, "And now, remote, real-time reference! …. The goal in the electronic environment is to be interactive, immediate, individualized, 24/7." After Steve's enthusiastic overview of "Virtual Reference Service," the facilitators distributed handouts, such as "Service Tips from LivePerson.com" and Anne's "Draft Guidelines for Providing Virtual Reference Service", demonstrated the new technology, and assigned practice exercises.

The next day, as lead librarian for SJPL's venture into chat reference service, I informed my colleagues via email that my mind boggled at "the enormous potential of what we're trying to do." I further explained

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that we were learning how to launch a new reference service using new software "in collaboration with nine other Bay Area libraries, the System Reference Center, and two commercial companies …. It's an exciting venture." It would prove to be, in fact, an exciting collaboration in reference service over the next ten years.

In a DIG_REF listserv post to "Fellow Librarians and Reference Staff throughout the World," Steve Coffman offered a unique "opportunity to participate in live online reference practice sessions." He noted that "your brave colleagues" in Bay Area libraries were ready to launch a new service enabling librarians to push Web pages to patrons' computer screens, escort them through database searches, and talk via text chat. Steve stated that before going live to the Bay Area's general public, we would require practice "under conditions that … approximate the real world," and for this he invited librarians to play the role of patrons to pose questions to be answered quickly through the system. Thanking volunteers in advance, Steve signed the post, "Your colleagues at the Bay Area (Public) Libraries (Contra Costa County, Pleasanton, San Mateo, San Jose, San Francisco, Redwood City, San Bruno, Palo Alto, Sunnyvale, Mountain View, and the System Reference Center)."[5] As with any new tool, becoming proficient with the chat software took extensive practice. After many structured practice sessions, we prepared for "live" chat sessions with library listserv subscribers.

A few days into the "live" practice week (one hour each work day), I reported to my SJPL colleagues that there was "substantial interest in this new way of providing reference service, with a new software product, in a collaborative manner." One practice patron, a Northwestern University librarian, was going to recommend the software to his supervisor the next day. I also reported to my colleagues that responding to five inquiries my first hour was "scary, fun, and exhausting." Even with librarians from two other library systems also answering inquiries that hour, "patrons" were often on hold.

By the end of the week, however, we were answering 30 to 40 questions per hour. Server logs showed thousands of visits to the practice site, with over 300 people, true patrons and not just "patron-librarians," actually logging on and asking questions.[6] We were convinced that there would be as much customer demand, and more, as librarians could accommodate. In September the new service had a full-time coordinator for the Bay Area service, and by year's end, a group of local librarians and staff of a design company had chosen a name and logo for the service: QandAcafe.

2001: Going Live and Getting Known

In early January, 2001, the American Library Association Midwinter Conference in Washington, D.C., kicked off the year with a highly successful program called "Live from DC." Over 500 people participated, both on site and remotely via the internet. One of the eight sessions, "Marketing Virtual Reference Services," described the QandAcafe marketing plan. Another, "The Bay Area Libraries Project," provided a view from front-line librarians, including a demonstration of the chat software, live from San Jose (with me as librarian), and from Reno, Nevada (with a vacationing Redwood City librarian acting as a patron). It was exciting to see colleagues logon from as near as my own library and as far as from New Zealand. Although the chat demo was brief, it allowed us time to push slides and take questions. So many excellent questions were raised both via chat and on-site in Washington, D.C. that limiting the session to fifteen minutes was a challenge. One colleague wrote later: "Congratulations…this is so impressive and OUT THERE."

Meanwhile, a new group of librarians from Bay Area public and academic libraries[7] (including San Jose State University) had received QandAcafe training. All participating libraries received the "QandAcafe Promotion Kit," and the project captured early media attention. In February, QandAcafe went live to two small communities. Eighty librarians from twenty-five public, academ-

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ic, and special libraries answered chat questions Monday through Friday, 3-9:00pm. At SJPL, four reference librarians provided QandAcafe service five hours a week at a telephone reference desk. In telling our exciting story, librarians involved in this new service participated in a "Live from London" program for the Internet Librarian International Conference in late March. In this session, there was standing room only and by all reports the presentation and demo were flawless. One colleague comments, "the online demo of QandAcafe at Internet Librarian was extremely successful."

The virtual reference field was rapidly developing. By late March, over 100 libraries throughout the United States used LSSI alone (over 250 by August), and Anne G. Lipow and Steve Coffman had just published their *Virtual Reference Desk Training Manual*.[8] In April we learned from Metropolitan Cooperative Library System (MCLS) 24/7 Reference Project Director Susan McGlamery that three months after adopting their "new state of the art service platform" and ten weeks after going "live" to the public, service hours at five participating southern California libraries were up to 98 hours per week, expanding toward the goal of 168 hours (24/7). Academic organizations such as the California State University and the University of California systems, the California Institute of Technology, and several community colleges were testing the LSSI chat software. Inquiries, evaluation, and testing projects were ongoing at public, academic, and special libraries across the U.S. and in Canada, Europe, and Australia. By June (as the Cleveland Public Library and CLEVNET consortium kicked off its own 24/7 web reference service) the MCLS 24/7 Reference Project officially began operating 24/7, and its products and services were demonstrated at the ALA Annual Conference. Northern California's QandAcafe went live to two larger cities; marketing postcards were sent to 61,000 households. By July QandAcafe rolled out to more Bay Area communities from Mendocino to Monterey.[9]

In August a newly formed eight-member QandAcafe Advisory Board met online, using the software's Meeting Room feature. The first QandAcafe User Group meeting was held at San Francisco Public Library. While celebrating the year's accomplishments, we also addressed challenges such as marketing the service to our own colleagues and managers, whose buy-in we needed but didn't always have. For example, a librarian had commented to me that "We already have real-time reference. It's called the telephone." The comment gave me another opportunity to explain that we were meeting the patrons at their point of need: online, in real time. After putting the QandAcafe logo on our library websites, each participating library system started distributing QandAcafe logo bookmarks and business cards. QandAcafe was one of five projects described in "Library Reference Goes Live on the Net, Available 24/7," an article published by the Institute of Museum and Library Services.[10]

Immediately following the September 11 terrorist attacks in the United States, in the interest of public safety and controlling gathering places, some libraries closed, but SJPL remained open and worked our QandAcafe shift. Then in October, southern California's 24/7 Reference Service staff started providing reference help for northern California's QandAcafe service on weekends, adding over ten more hours of patron access.

We rolled out service to California State University at Monterey Bay and to San Jose Public Library patrons. The QandAcafe coordinator and staff of participating libraries and library systems actively promoted the service, and the QandAcafe Communications Plan was drafted. The new service was announced in a City of San Jose quarterly publication sent to all residents. By the following April, QandAcafe was advertised at four bus stop signs near Alameda County high schools and middle schools. In November we presented another live demonstration of the software at the Internet Librarian Conference in Pasadena. I logged on

from San Jose as patron while a San Mateo Public librarian explained the librarian side of things directly to 100-200 attendees, standing-room-only. Later the same month, QandAcafe won one of the three awards for Exemplary Digital Reference Services 2001 at the 3rd Annual Virtual Reference Desk (VRD) Conference in Orlando.[11]

2002: Planning and Expanding

Since 1998, SJPL had been planning to merge its main library with the San Jose State University (SJSU) Library in a new building to open on campus in August, 2003. In early 2002 we began to plan merged SJPL/SJSU "remote" (including telephone and online) reference services, and drafted recommendations for service standards, policies, procedures, accountability, evaluation, and linkages between types of reference service such as email and chat. Later in the year we prepared specific recommendations on merged QandAcafe chat reference service. Other developments were quickly unfolding, especially in the field of chat and other web-based technologies compatible with virtual reference.

In June the Library of Congress (LC) and Online Computer Library Center (OCLC) announced a new collaborative email reference service named QuestionPoint (QP). According to the LC/OCLC press release, QP was to provide libraries with "access to a growing collaborative network of reference librarians in the United States and around the world." Library patrons could submit questions at any time via their library web sites, and their library staff would answer directly or forward questions to staff of participating libraries. The service was based on the Collaborative Digital Reference Service (CDRS) pilot started in early 2000 by LC and sixteen partner libraries. According to Diane Kresh, Director of Public Service Collections at LC, "QuestionPoint is about redefining the role of the library and the librarian in the digital age. The technology enhances the services we are able to provide to our traditional users. It will also enable librarians throughout the world to collaborate with

their colleagues and work with new audiences in creative and exciting ways."[12] Within months, this new service would merge with our 24/7 technology.

In order to guide use and standardize practice, in September, a skeletal SJPL Policy Page went up on the 24/7 staff site, to be modified after the new merged library opened in August, 2003. Chat session transcripts requiring follow-up would now be coded and sent to our SJPL email reference service account in Microsoft Outlook.

Amidst library budget concerns, Bay Area library consortium leaders agreed to switch vendors for QandAcafe, from state-funded LSSI to the more stable, federally funded MCLS 24/7 Reference Service Project. Bay Area librarians looked forward to participating in statewide collaboration and full 24/7 service.[13] While LSSI and 24/7 software products were both based on eGain Corporation technology, the primary focus of the 24/7 software was to enable chat reference librarians to answer questions cooperatively. One helpful feature was the ability to forward questions requiring follow-up to specialists in subjects such as Art, Law, Spanish-speaking, or Tutor.com homework help.

2003: Merging SJPL and SJSU

At the start of the year, the 24/7 Reference Service software provider changed from eGain Corporation to Cherry Hill Company. That spring, participating California librarians started monitoring a new K-12 queue; school librarians started placing links to the chat service on their websites. Throughout the July move to the new building, SJPL did not monitor QandAcafe or provide many follow-up answers via email. However, the QandAcafe icon and link remained on the library website and patrons continued to be assisted by other QandAcafe and 24/7 Reference Service librarians, representing once again the power of collaboration. While this was occurring, the service began to expand beyond the borders of California. A new avenue for collaboration was found in Mas-

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sachusetts, as reported in the April edition of *Computers in Libraries* that highlighted virtual reference services and included the article "We've Jumped on the Live Reference Band Wagon and We Love the Ride!"[14]

Upon resuming our chat reference service, SJPL librarians were grateful for the patience and fortitude of QandAcafe and 24/7 Reference Service librarians who had assisted our patrons during the move. We also appreciated the efforts of SJPL branch colleagues who had temporarily provided email reference service for us, especially as we were inundated with questions about the new library. Also, by answering some chat reference questions requiring follow-up, branch staff helped reduce the backlog of questions facing us upon our return to public service.

With our single SJSU/SJPL web site and catalog, but maintaining separate SJSU/SJPL policies, procedures, and chat reference service links (one for SJSU students and one for the general public), the newly merged library proved challenging to librarians in the northern California, southern California, and national 24/7 Reference Service cooperatives. We did our best to clarify matters, while adjusting to an inherently complex institutional environment.

Meanwhile, the merged northern California QandAcafe and southern California 24/7 Reference Service had a new name: California AskNow. Coordination, training, and marketing of the statewide cooperative was being developed by its senior administrators. Collaboration with an ever-widening base continued to be highly rewarding.

2004: Merging OCLC and 24/7

In January, the statewide cooperative revved up quality control efforts, with each library's AskNow administrator routinely evaluating a portion of its patrons' sessions. In February the American Library Association's Reference and User Services Association (RUSA) guidelines for behavioral performance were revised to specifically in-

clude remote reference situations. By March, the California AskNow logo was used by participating libraries throughout the state, and the AskNow publicity site was further developed. To improve quality control and track usage, patrons logging into the service directly via the AskNow.org site (as opposed to links on their library websites) were required to provide their zip codes.

In May, MCLS and OCLC signed a letter of intent regarding a possible merger of 24/7 Reference chat service with QuestionPoint email service and the merger took effect in August. According to George Needham, Vice President of OCLC Member Services, "The integration of the QuestionPoint and 24/7 Reference cooperatives will enable us to offer a fuller suite of virtual reference services, adding value for all cooperative members."[15] Management of the service was given to two part-time coordinators – one in the southern part of the state and the other located in northern California. Indicative of the growing acceptance of virtual reference, as was our experience in California,[16] as well as need for direction and management of the service in the library community at large, in June ALA MARS-RUSA published "Guidelines for Implementing and Maintaining Virtual Reference Services."[17]

By year's end, significant accomplishments were realized: the 24/7 chat reference software was fully integrated in QP; California AskNow had joined the nationwide 24/7 Reference Service cooperative; designated SJPL librarians prepared to monitor nationwide queues.

2005: Going Nation-wide and Learning QuestionPoint

In early January, I told my colleagues via email that "[t]oday was my first experience monitoring the nationwide queues, and I loved it!" My first patron was from California. The second patron, although also from California, used the New Jersey website queue to and was surprised to be assisted by a California librarian. Equally if not more surprised was the third patron, who was

from Minnesota but used a Connecticut queue to ask about a particular librarian position in Hartford. The fourth patron from Broward County, Florida, and actually used the Broward queue! Both the patron and I were thrilled about co-browsing to find materials in Broward's library catalog and to discover other resources such websites via "Librarians Index to the Internet." In championing this service to my colleagues, I hoped they would share my sense of excitement and satisfaction at expanding my service as a reference librarian nation-wide.

In April, OCLC offered an option to link library QuestionPoint accounts to Open WorldCat records. Library patrons using large search engines such as Google or Yahoo! now could be linked to their own library's Open WorldCat record and, on the search results page, click on a link to connect to this collaborative chat reference service.

In July, California State Library funding for the northern California AskNow part-time coordinator position was eliminated, leaving just one part-time coordinator in southern California. The decreased support proved challenging to AskNow librarians throughout the state. Migrating the AskNow chat reference service to QuestionPoint software in August helped mitigate the effects of this cutback in staff support.

In November, the QuestionPoint team introduced the first beta version of a new Flash-based chat software, and developed it based on feedback provided by the QP 24/7 Reference global community. The Flash-based software now allowed for a more closely simulated face-to-face interaction with virtual reference patrons.[18] An updated version of the Flash chat pilot was officially released in December.

2006: New Flash Chatting; Losing a California Coordinator

While California AskNow may have been struggling with reduced support, an increasing number of statewide projects and other

library groups continued to join the 24/7 Reference Cooperative. After months of intensive development, testing, and feedback, OCLC announced the official release of the "new" QuestionPoint Reference Management System. This included its Flash chat platform, integrated session follow-up and email web form, reporting/statistics, 24/7 Reference Cooperative coverage, and knowledge bases. By March, all libraries participating in the 24/7 Reference Service Cooperative had switched over to the new version of QP. More software enhancements and fixes continued to be made, including the reinstatement of the California Law Cooperative that allowed us again to refer patrons to the busy, helpful law librarians.

At this time SJPL and SJSU provided chat reference service in a parallel rather than a merged manner, though each continued to share matters of mutual concern. Academic usage in general had gone up, and SJSU led the way in chat reference service for the California State University (CSU) system. In July. the California State Library eliminated the remaining AskNow part-time coordinator position. In an attempt to fill some of the resulting void, librarians throughout the state volunteered to serve on a new California AskNow Advisory Board. This, however, proved to be insufficient in light of ongoing challenges such as the state budget crisis, library staff reductions, and software glitches. California librarians - the first in the country to provide *collaborative* web-based chat reference service – grew increasingly weary, even while other states (each with at least one full-time coordinator) and nations were making great strides in providing the service. Feedback from users during the year revealed a high level of satisfaction with the service and users expressed encouragement to keep virtual reference available.[19]

2007: Advising, Policy Updating, and Quality Controlling

In February, an SJPL branch librarian joined King Library reference staff in providing chat service, a move later followed by other

branch librarians that made it truly it a system-wide service for the library. The 24/7 Reference Policies, including a revision of the section on rude patrons and new sections on patron privacy and librarian screen names, were part of the updates approved by the Reference Advisory Board in March. And by the end of the month, over 1,200 libraries were now included in the 24/7 Reference Cooperative.

In May, two new members joined the 24/7 Reference Advisory Board: myself and the Coordinator of the Enquire cooperative, a group of over 80 public libraries in the United Kingdom. Expanding internationally has been a fascinating, if not challenging experience. Having the 24/7 Reference Service Back Up staff answered questions for the Enquire group after hours was one way to deal with vast time-zone differences. About this time, other state-wide opportunities for virtual reference service were being explored. The California State Librarian announced that June a plan for statewide reference service—including virtual reference—to be implemented by early 2008 (although as of early June 2010, it has not been implemented).

AskNow received word in July that funding for the service for the service would be renewed for fiscal year 2007/2008 that again would pay for software but not for operations support. The AskNow website could again be maintained, but not significantly improved. Another positive development occurred in August with the merger of the SJPL and SJSU email systems into that provided by QuestionPoint. Given all these positive developments over the recent months, in September an SJPL branch librarian created an in-house marketing tool to encourage all library staff to try the service themselves and promote the service to patrons, and, if interested, volunteer to be trained in providing virtual reference. The memo stated that "Your familiarity with and promotion of AskNow can make the difference between a dissatisfied, neutral, or potential customer and a fully satisfied, enthusiastic library supporter."[20] Again, user

feedback during this time continued to be very positive.[21]

2008: Planning, and Expanding Internationally

Following a period of consolidation of the service during the first part of the year, in October, QuestionPoint sponsored a QP webinar attracting 150 attendees on the new "light chat" widget called "Qwidget." Adding to a growing new vocabulary, a Qwidget, introduced by QuestionPoint, is a "Meebo-Me-like chat box that libraries can place anywhere on their website, at the customer's point of need. Unlike other widgets (like MeeboMe), the Qwidget will allow multiple concurrent sessions on the librarian side."[22] The Qwidget provided simpler and more immediate access to the service, bypassing the form required of patrons using the traditional link access. It was also less complex for librarians providing the service, although not all software features could be used.

Building on rapid advances in theology and service development, in November, attendees at the QP User Group Meeting concurrent with the California Library Association's annual conference in San Jose learned that QP now covered over 2,300 library profiles in 24 countries, with over 19,300 Global Knowledge Base records in 11 languages, 12,000 librarian accounts, and 3,500,000 chat and email transactions.

In December, SJPL quietly launched the new Qwidget access to chat reference service on two library web pages and staffed the pilot service five hours per week. This, and other improvements, garnered further favorable comments from patrons.[23]

2009: Qwidgeting and the End of California AskNow Grant Funds

In January and February, the immediate popularity of the new mode of access via Qwidget increased local demand for chat reference service and began to place strain on the California AskNow cooperative.

In March SJPL and SJSU split the cost of our own institution-specific queue for questions asked via the Qwidget. After training additional staff to use the software, we provided the merged service for four hours (later adding an hour) Monday through Thursday afternoons, without backup from the state-wide cooperative. Both public and academic librarians enjoyed providing the popular service. SJPL resumed its tradition of answering more questions for the cooperative than our patrons asked of the cooperative.

In April three online QP User Group meetings were held at different times to accommodate librarians in a variety of time zones. It was reported to attendees at the Pacific Time Zone meeting that QuestionPoint how provided services through libraries in Spain, Italy, United Arab Emirates, Puerto Rico, Peru, and Brazil, and it was anticipated that Ireland would soon join.

Fall, 2009, saw further developments, some not entirely welcomed. In September the ongoing process of QP's move to new architecture caused month-long technical difficulties that frustrated both librarians and patrons, and skewed annual statistics. Financial concerns also emerged. In October, we learned that MCLS (renamed the Southern California Library Cooperative (SCLC) would not submit another Library Services and Technology Act (LSTA) grant[24] proposal to the State Library for California Ask-Now chat reference service. Nor was it likely that the State Library would accept a similar grant proposal if submitted by another organization. California AskNow participating libraries seemed to be on their own to determine the future of chat reference service for our patrons once this source of funding ended in 2010.

By the end of the year, patron feedback was encouraging, though with some backhanded compliments—complaints, actually, but along the lines of the service not being well-enough publicized and having not enough hours of service.[25]

2010: Budget Reducing, Restructuring, and Going Full Circle (?)

In January, to meet a growing demand for mobile and Web 2.0 applications, QP software was upgraded to include new features and enhancements such as Qwidget applications for mobile phones (iPhone, Palm Pre, and Android), library Facebook pages, and WorldCat Local. Reports indicated the service continued to grow, and quite dramatically. By February, overall traffic increased 17.58% since calendar year 2008, to a total of 468,684 chat sessions. Of those sessions, 68% were on public library queues and 32% on academic.[26] Part of the success stems from agreements where both the Public and the Academic Library Cooperatives are supported by the 24/7 OCLC backup staff, which picked up 32% of all sessions.

A new QP pilot program in select libraries allowed Qwidget chat service to be accessed by the larger 24/7 Reference Service cooperative. If successful, the pilot could become an optional program for QP member libraries with high numbers of patrons using the system. Although SJSU librarians had preferred to limit Qwidget chat service to in-house librarians since the simulated face-to-face contact would be appreciated more by local and familiar patrons than by complete strangers, and the library could reap better returns in public relations, in light of budget cuts and severe staff reductions, the value of using his technology in a multi-library collaboration was acknowledge more widely.

In the spring, QP partnered with Mosio's "Text-a-Librarian" to provide chat and SMS (text messaging) reference service on a single platform. Each vendor began offering a discount to newly subscribing libraries that already used the other vendors' product.

By this time an SJPL/SJSU Virtual Reference Task Group had started testing products other than QP for chat, email, and SMS reference service to start July 1. These products had a variety of useful new features, such as more intuitive interfaces for both patrons and librarians, plus other features under

development, but none had either the single-platform email/chat capability of QP or the extensive collaboration of 24/7 Reference Service supporting the technology. As of this writing, we have had insufficient time to embark on related cost-effectiveness evaluations, and so any decision to adopt new technologies remains in the future.

Meanwhile the California State Library announced negotiations with regional library consortia for state grants to fund another vendor's chat reference product. In mid-May, as the new fiscal year quickly approached, SJPL renewed its QP 24/7 Reference Service membership, with the intent to switch to providing a new state-funded service when it becomes available. Until that change, SJPL will continue collaborating with SJSU in providing Qwidget chat and email reference service via QP software. At present, early June, 2010, it remains to be determined whether SJPL could collaborate with SJSU and/or northern California libraries in providing new chat and email reference services.

By mid-year, and the end of this narrative, positive comments continued to flow in about the service. Clearly, collaborative chat reference service has made a positive difference for a vast array of patrons, and has helped situate SJPL in a place of higher service to the community.[27]

And so, change continues to be the only constant. After ten years of increasing collaboration in providing chat reference service, first in the Greater San Francisco Bay Area, then throughout California, the United States, and then the world, SJPL may return to the start, back in the Bay Area, with new software. We have learned from the past ten years that we are resilient in the face of change, and, in fact, thrive on it when in the best interest of our library patrons. Early adoption, expansion, promotion, mergers, new technologies, budget challenges, quality control, and global outreach all have been part of the adventure. This reference librarian hopes and expects that SJPL will continue to provide the high quality of service

our online reference patrons have learned to anticipate and rely on.

Endnotes

[1] Initially referred to as "virtual," Web-based chat has been called digital, electronic, interactive, live online, real-time and synchronous reference service. For simplicity and to distinguish it from email, Instant Messaging, and text messaging services, the term "chat" is used here. For an excellent bibliography of published writings and other resources on collaborative virtual reference and related themes, see: http://www.library-mistress.net/library20/lib20-reference.html.

[2] For a good history of virtual reference, see: Joe Janes, "An Informal History (and Possible Future) of Digital Reference," *Bulletin of the American Society for Information Science and Technology* 34, no. 2 (December 2007/January 2008), http://www.asis.org/Bulletin/Dec-07/Bulletin_DecJan08.pdf. For an overview of some of the challenges and ongoing issues in virtual reference service, see: R. David Lankes, "Virtual Reference to Participatory Librarianship: Expanding the Conversation," *Bulletin of the American Society for Information Science and Technology* 34, no. 2 (December 2007/January 2008), http://www.asis.org/Bulletin/Dec-07/Bulletin_DecJan08.pdf

[3] Disclaimers: Some article content is from electronic and print copies of email messages, the author's notes, or other reliable sources but not every quote is verified by a footnote. Any views expressed in the article are those of the author and do not reflect the official policy or position of the San Jose Public Library System.

[4] See Elizabeth Shaw, "Real-time Reference in a MOO: Promise and Problems," *Online* (April 1996), http://www.ipl.org/div/iplhist/moo.html.

[5] Steve Coffman, "Opportunity to Participate in Live Online Reference Practice Ses-

sions," posted on *DIG_REF* listserv, September 9, 2000.

[6] Ibid. "Thank You from the Bay Area Libraries Project," posted on *DIG_REF* listserv, September 18, 2000.

[7] While relevant, it is not the purpose of this essay to explore the dynamics and issues related to the collaborative nature of joint public and academic virtual reference service. For an overview of what some of these issues entail, see Richard W. Boss, "Virtual Reference": http://www.ala.org/ala/mgrps/divs/pla/plapublica-tions/platechnotes/Virtual_reference.pdf, especially 5ff, available through the American Library Association.

[8] Anne G. Lipow and Steve Coffman, *Virtual Reference Desk Training Manual* (Berkeley: Library Solutions Press, 2001).

[9] For an account of the QandAcafe development in Northern California, see: the Newsletter of the Northern California & Nevada Medial Library Group, Vol. 24, issue 3 (November-December, 2002): http://www.ncnmlg.org/pubs/newsletter/nov_02.pdf

[10] Institute of Museum and Library Services, "Library Reference Goes Live on the Net, Available 24/7," http://www.imls.gov/index.shtm. (No longer available on site)

[11] Heather Tunender, "3rd Annual Digital Reference Conference," *Library Hi-Tech News* 19, No. 2, http://www.emeraldinsight.com/Insight/ViewContentServ-let?contentType=NonArticle&Filename=Published/NonArticle/Articles/23919bac.005.html.

[12] Library of Congress, "QuestionPoint Collaborative Reference Service to be Released June 3 by the Library of Congress and OCLC," Press Release, May 21, 2002, http://www.loc.gov/today/pr/2002/02-073.html.

[13] For an account of this merger, see: http://www.oclc.org/news/releases/20048.htm.

[14] Glenda Schaake and Eleanor Sathan, "We Jumped on the Live Reference Bandwagon and We Love the Ride!," *InfoToday 23* (April 2003), http://www.infotoday.com/cilmag/apr03/index.shtml.

[15] George Needham, "OCLC and MCLS to Combine QuestionPoint, 24/7 Reference Services, OCLC Press Release, August 11, 2004.

[16] Our chat service received this glowing patron survey feedback: "IT WAS REALLY KEWL."

[17] MARS Digital Reference Guidelines Ad Hoc Committee, "Guidelines for Implementing and Maintaining Virtual Reference Services," Reference and User Services Association, June, 2004, http://www.ala.org/ala/mgrps/divs/rusa/resources/guidelines/virtrefguidelines.cfm.

[18] See: Report of Regan Harper in the *BCR Newsletter*: http://blogs.bcr.org/bcreview/2006/08/.

[19] From surveys submitted after chat sessions, accessible since 2006 via QP administrative staff accounts. Key comments include the following: 17:24 2006/05/02 - *the librarians are very helpful, and my question are answered quick and easy. please continue this service years to come. i love it!!*; 02:58 2006/07/12 - *Jonathon B. was the gentlemen that had help me with my question. He is very polite and very helpful. I would highly recommend him, and this service to anyone. Keep this site alive, you folks are doing a great job in helping many others* ; 23:07 2006/10/17 - *This is a great service and resource!!! Please don't ever discontinue or cutback on the hours!!!!!!!*

20 Carine Risley, "Promote AskNow Now!" memo to SJPL staff, September 27, 2007: "Your familiarity with and promotion of AskNow can make the difference between a dissatisfied, neutral, or potential customer and a fully satisfied, enthusiastic library supporter."

21 Favorite survey comments by patrons in 2007 include: 00:32 2007/04/28 - *Wow, to answer a question at midnight -- that's great service! Keep it going!*; 09:21 2007/07/30 - *This was brilliant. The service was professional, friendly, helpful, knowledgeable, and just all around exactly what I needed to help research.*; 18:53 2007/11/08 - *SUPER SERVICE! VERY MUCH APREC IATED BY THIS USER WITH SEVERE HEARING LOSS MAKING VOICE PHONE DIFFICULT. THANK YOU MUCH!!*

22 See the "Ask Here PA" service web page: http://www.askherepa.org/chat.htm.

23 Noted survey comments by patrons in 2008 include: 12:31 2008/01/15 - *SO HELP-FUL! I am a high school English teacher, located in Texas, and needed help viewing an online tutorial. The Librarian was knowledgeable and friendly, and I appreciate the help very much! I wish everyone was as willing to help a stranger! Thanks!*; 15:58 2008/03/06 - *I had a question very specific to my local libraries loan policy, yet the online librarian was able to locate the information immediately and send me the link with the information. Very speedy, efficient and professional - a great service!*; 16:09 2008/10/05 - *I'm a writer and I do a lot of my research from home as well as from libraries....This service is very helpful since I work very odd hours and can receive assistance any time of the day.*; 08:55 2008/11/05 - *I received help today that will support my job search….This went better than any other chat session I've ever had. Thanks*

24 LSTA grants originate with the federal government with funds allotted state governments to award to regional and local organizations.

25 Survey comments by patrons in 2009 include: 20:29 2009/03/16 - *This service is a boon for writers, researchers and students. I use it a lot and I'm sure all writers like me love it. Thank you! This needs to be advertised more. I don't believe the general population knows enough about it.*; 18:34 2009/03/27 - *awesome staff member. Give Marie a raise.*; 15:32 2009/05/04 - 2-6PM? Horrible hours*; 21:50 2009/05/14 - *I love this! It helps me since I'm not the type to go out to ask people. Oh, and especially the librarian online were so nice!*; 13:54 2009/06/01 - *I want to express my appreciation to San Jose library staff for the quick and know-ledgeable response…. I work online most of the time, so this facility integrated seamlessly and I found it extremely convenient to chat while looking for information online.*; 16:14 2009/07/08 - *I am an SJSU faculty member, and the assistance I received from Erin was extensive, detailed, and accurate. I am very impressed with her expertise and grateful for her guidance.*; 23:26 2009/10/05 - *Thanks, sending me sites really helped instead of just giving advice of where to go.*; 21:46 2009/10/23 - *Appreciate the ability to have a needed educational support system. Especially with these late hours. It really helps when studying and researching does take place at these times rather than a 9-5 service.*;01:12 2009/12/14 - *I love the service! It is past midnight and I had a very helpful librarian answer a few questions in a very speedy manner, which will save me probably an hour of work… .*

26 As reported in February, 2010, by Susan McGlamery, Project Director for 24/7 Reference and the Global Product Manager, including QuestionPoint, of Cooperative Services for OCLC.

27 Typical comments (through early June, 2010, about the service include: 05:52 2010/03/18 - *Information was useful and even though this was a virtual transaction, the librarian seemed to have a friendly helpful tone! Thanks a lot!*; 11:59 2010/03/25 - *I love this service! ... people…don't appreciate…how helpful librarians can be…we've become too lazy or dependent on the Internet….mixed in with legitimate information is too much which is false or opinion that masquerades as fact. If you want*

reliable, truthful information, and…confidence that in fact, you have it, go to the library!; 16:03 2010/04/05 - *I really like how they send the transcript (content of conversation) to my email. It's a WOW!*; 18:25 2010/04/20 - *This service is really helpful for a college students, like me, who have erratic schedules and might need help doing research when our own school library is closed and our regular librarian is off duty…. I wish I knew about a resource like this when I was in high school.*