

**WEB-BASED VIRTUAL REFERENCE SERVICES:  
A PANEL DISCUSSION**

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**What is Virtual Reference?** (Section led by Beth Avery)

Virtual reference goes by many different names: chat reference, real-time digital reference, 24/7 live service. Some services have developed a brand name such as AskColorado, Q and A NJ, and Virtual Reference Desk.

Virtual reference can be best defined as a service that uses technology, allows users to access reference librarians in real time, and is not bound by space and time (Janes 2002).

There are several benefits to virtual reference. As opposed to e-mail reference and letters, it is synchronous and seems more personal since the librarian is responding to the patron in real time. In addition, people see it as more “techie” and are more apt to use it as by doing so they appear to be part of the “in crowd.” When virtual reference is available 24/7 it can greatly extend the number of hours library reference and one-on-one instruction is available. 24/7 virtual reference can be made available through cooperation with other libraries and/or by paying a vendor to provide answers to questions when the ‘home’ library is not online.

However, there are limitations and frustrations to virtual reference. Virtual reference needs higher connection speeds in order to demonstrate and lead patrons through various sources and to push pages to them quickly. The expectation is that the question will be answered immediately. When it is not, the patron can become impatient and give up. Patrons may also give up when they don’t have the expertise to follow what the librarian is doing or to understand the software. Phrasing a question in writing is often difficult. The give and take needed to define the question is slower than in person. Librarians can also be frustrated by the process. Demonstrating a search online involves an amount of

risk on the part of the librarian. When the patron is present our non-verbal cues indicate our frustration if we don't get the answer we want. When the librarian is sharing a screen with the patron, the patron doesn't see the librarian and expects the first thing to be 'the answer.' There are no non-verbal cues from the patron. The librarian doesn't see that look that indicates the patron didn't understand what you just did.

There are many vendors for virtual reference software. Each package has its strengths and weaknesses. Before selecting a package, the librarian should do trials of the software and talk to those who are using the software.

### **Partnering** (Section led by Lea Wade-Torres)

The Southeast Louisiana Digital Reference Service is a partnership that was started as a way to reach students when they were most likely to need assistance. It was observed that the majority of e-mail questions were received after 4:00pm. The Southeastern Louisiana University in Hammond (SLU) & University of New Orleans (UNO) joined forces so more hours could be covered.

Many factors were considered in the choice of a virtual partner:

- Similar Reference department size (8 at UNO; 7 at SLU)
- Reference department skills
- Similarity in student populations
- Similarity in academic programs
- Similarity in electronic resources
- Reasonably close proximity for training and planning meetings
- Willingness to experiment

Early on it was recognized that training would be one of the most important parts in making virtual reference a success. One and a half days of on-site, hands-on training for all librarians was held in August 2002. A second half day of training was held for program administrators. There were ten training queues for additional practice until service went live in September 2002. Because each library had its own idiosyncrasies, training included instruction on unique databases, services and locations. Each group toured the other library, so they could understand when people referred to specific things about their library.

Scheduling and communicating was a concern. It was decided to use a Yahoo! Groups discussion list to communicate questions about chat operations, requests for assistance, etc. Yahoo! Calendar was used to post chat schedules. In addition, the calendar sends an e-mail reminder to the scheduled librarian 15 minutes before each shift begins. Each library covered 17 hours during the week. Shifts generally lasted one to three hours. One librarian monitors the service at a time. During shift change, two librarians can be logged in temporarily to ensure smooth transition

Sharing database access and the online catalog was made somewhat easier by the shared databases and catalog system through the state consortium. However, each library requires the student/patron to log in remotely using student ID. Access is based on student/patron affiliation. Since there was no authentication prior to chat contact, student/patrons had to log themselves into the database first, then the librarian guided the search. We needed to determine which campus the patron was affiliated with for database license restrictions. Each library designed and created its own web portal and unique name identifiers for the service. Web frames allowed unique web pages to run alongside chat reference question

Transcripts of chat sessions were sent to both the patron and the librarian at the end of the session.

### **What It Takes To Be A Good Virtual Reference Librarian (Session led by Jan Heckman)**

There are many technical skills needed to become a good virtual reference librarian. Among the essential skills are basic typing and spelling skills; a knowledge of basic ready reference sources; a knowledge of the web, online sources, and search engines; and most importantly the ability to conduct a reference interview efficiently and effectively to determine the actual need of the patron.

In addition, there are personal traits that one needs to become a good virtual reference librarian. First of all, one must not have too great an ego. There are times when the librarian cannot answer the question immediately online and it needs more work offline or needs to be referred to another librarian. Second, the librarian needs to want to continue learning new skills and information sources.

There are several issues the library staff needs to discuss before the service begins to help the librarian. First, what is the scope of the service? Do you provide just ready reference answers or do you get people started on longer searches? Do you provide instruction? Second, which databases will you be working with? The contract will tell you who can have access to the database. You may have to set up alternative access since some patrons will be using the service off site. Third, where will the librarians be located while they are staffing the service? Most people have found it impossible to handle the reference desk and the virtual reference service at the same time. The question then becomes, do librarians handle their time on the virtual reference desk from their offices or from one central virtual reference desk?

### **Marketing The Service (Session led by Jean Crampon)**

Marketing the service was essential to our effort. Looking back we realized there were several things we "did good." This started with getting buy-in from the administration before we began the project. This made getting funds for the marketing easier. We started

small. We added links from every library web page to the service. We had many posters and bookmarks printed. At first, they were distributed all around the library. Then we distributed them to the user rooms and computer labs.

On the theory that a successful interaction would be our best advertisement, we made sure that the librarians involved had time for training and practice. We discussed with the students and the library staff what we wanted the service to do. While we originally saw this as a transition from our remote user services, we soon learned that it was being used by more on-campus users than off-campus users.

As pleased as we were with our marketing efforts we realized that there were things we would do differently if we were to do it again. First, we would get more buy-in from the librarians and staff. We would spend more time discussing virtual reference services and learning about what they do. We would get more people involved in selecting the product we would use. Second, we would make sure that someone from each area was trained in the use of the product. Third, we didn't spend enough time defining our audience. As a result it is open to the world.

#### **Assessment Of Virtual Reference At CSU Northridge (Session led by Snowdy Dodson)**

Since CSU Northridge had been doing e-mail reference for a long time, virtual reference seemed a natural step. At first only a few hours in the late afternoon hours were covered by virtual reference and we continued to have e-mail available during the rest of the time. In order to assess the effectiveness of the virtual reference service we surveyed the users of the services. We thought the users would be more likely to complete the survey if it were short. So we covered only the main areas of concern. The survey questions covered the following topics:

- Satisfaction with information provided
- Librarian helpfulness
- Technical problems
- Ease of use of the virtual reference service
- Convenience of service hours
- Would you use again
- User demographics

The responses were compiled by hand, though it would be easy to have them automatically compiled. Our results showed that most patrons were pleased with the service, but most had encountered technical problems. We did not ask whether problems were resolved.

Quality of Information Provided

91% - very relevant/relevant  
8% - somewhat or not relevant

Helpfulness of the librarian

86% - very helpful/helpful  
12% - somewhat or not helpful

Did you have any technical problems?

96% - yes  
4% - no or no answer

Ease of use

89% - very easy/easy  
6% - somewhat or not easy

Will you use the virtual reference service again?

84% - yes  
12% - maybe  
3% - no

Demographics

CSUN Status

80% - Student  
6% - Faculty  
14% - Other/unknown

Data courtesy of: Kathy Dabbour [kathy.dabbour@csun.edu](mailto:kathy.dabbour@csun.edu) and Lynn Lampert [lynn.lampert@csun.edu](mailto:lynn.lampert@csun.edu). The complete survey can be found at:  
<http://library.csun.edu/llampert/chat/survey.html>

**References**

Janes, Joe. 2002. Live reference: too much, too fast? *School Library Journal* Fall: 12-14.

