

DIGITAL REFERENCE SUBCOMMITTEE REPORT TO MERAC

“The MERAC Sub-committee on Digital Reference unanimously recommends to MERAC the development of a Grants Sub-committee to secure funding for a pilot project for a collaborative digital reference service. Participation in such a project would be voluntary and based on individual library interest.” Sub-committee recommendation passed unanimously 9-0.

OVERVIEW

For the purposes of this report and the discussions and deliberations of the subcommittee, Digital or Virtual Reference is defined as providing personalized reference service via the Internet, whether by e-mail, chat, or voice through the use of software. Patrons submit questions and receive answers via electronic means. All but one product offers live interactive chat, can push web pages, queue waiting patrons, and provide audible or visual alerts when a new customer comes online. Most software is capable of emailing transcripts of a chat session to the patron and generating statistics.

Virtual reference started sometime in the late 1980s or early 1990s with email reference and then progressed to chat sessions. To place this service in perspective: in the 1950s, librarians commented on the increased use of the telephone for reference transactions and worried it would interfere with assisting on-site patrons.

This subcommittee was formed because MERAC felt collaborative digital reference service was a topic that needed more exploration. As the committee discovered, digital reference is not new, but even though it is still in its infancy, the service is being implemented by consortia in other states and also by groups of libraries in collaborative projects. Some states involved in consortia or collaborative reference are: Colorado, Maryland, Massachusetts, New Jersey, Kansas, and Ohio. In Missouri a few libraries maintain their own service. Washington University is using Docutek and University of Missouri at Columbia is trialing various products. A Digital Reference Listserv is located on the Web and Bernie Sloan of Illinois has a list of more than forty collaborative reference projects at <http://www.lis.uiuc.edu/~b-sloan/collab.htm>. Digital Reference is a very popular topic.

SOFTWARE ANALYSIS

The subcommittee charge was as follows:

- a. identify products currently on the market
- b. compare/contrast features, functionality and price
- c. explore costs/benefits
- d. determine appropriateness of application for MOBIUS
- e. recommend or not the development of a grants subcommittee

- f. submit recommendations for future actions to MERAC

The subcommittee did an immense amount of information gathering concerning various software to satisfy the first three charges. Commercial software packages, available from many vendors, range from simple and fairly inexpensive to elaborate and very expensive. On the other hand, open source software created by individual programmers is available for free or a small fee. People are free to download the software, use it, and modify it. Unlike commercial software it comes with little or no technical support and documentation. Product evaluations were compiled using a virtual reference products checklist enabling the evaluations to be fairly standard. Company profiles and a chart of software features are attached to this report.

CONCERNS OF THE PROJECT

The Digital Reference Subcommittee was formed in December 2002 and a listserv was established to assist the members in sharing information and discussing this topic. Advantages and concerns were discussed through the listserv while software evaluations progressed. Some of those issues are:

1. Money - With budget cuts and the state's financial problems, will libraries be interested in participating or would money be better spent on new databases or retaining existing databases?
2. Staff - With staffing already tight, who will cope with the additional workload?
3. Staff resistance - Will the reference staff be reluctant or willing to participate?
4. Training time - How many hours of training will be needed to learn the new service?
5. Time - How many hours per week will each library be responsible for answering questions?
6. Use - Will the service be used?
7. User - Is the user sophisticated enough to use the service?
8. Collaborative service – The workload is distributed among libraries which reduces the burden on individual libraries, but requires more training, coordination, and administration.
9. Pilot project - Will the project consist of a test of software or actual collaborative virtual reference service among a small group of Missouri academic libraries?
10. Libraries – Most students are familiar with chat and email. Will libraries entice more students by offering digital reference and will these libraries be viewed as more progressive?

The subcommittee was not unanimously in favor of a digital reference project. Approaching the middle of February, it became obvious that the best way to continue the discussion and come to a decision was to meet.

DISCUSSION AND DECISION

On February 27, 2003, the subcommittee finally met fact-to-face at the MCO office in Columbia for final discussions and the preparation of a statement for MERAC. The product evaluations were discussed and it was decided a chart comparing the products was the best way to present

them. Terry placed the chart on the listserv for members to fill in with their product evaluations. After additional discussion, it was decided nine commercial products and two open source software products would be included. Three of the original commercial products were not included on the final list due to extreme cost or vendor problems. Company profiles with address and web sites were also compiled.

Products included are:

Virtual Reference – LSSI

LivePerson

LiveAssistance

LiveHelper

24/7 Reference

Elibrarian

Docutek

InstantService

QuestionPoint

Desktop Streaming

RAKIM

Those not included are:

OnDemand

NetAgent

CS-Live

Many of the earlier issues were reiterated at this meeting. Members were also concerned about how local issues and policies could be handled when a group of librarians at different libraries throughout the state answer questions. One member felt it might be easier for libraries to gain experience individually before attempting a collaborative venture. Another member noted that if individual libraries became accustomed to certain products, they might not want to switch when a group project used different software.

Questions on what the grant might entail were answered by Axie and Terry. Members were concerned about what would happen to the service when the pilot project was concluded. Another matter was the length of the pilot project and how many libraries would be included. Some members voiced the idea that a more feasible grant might be to trial different software products. Still another thought was whether a library contemplating starting virtual reference service would need to wait until the pilot project was completed to initiate its own service. These are questions for the grants subcommittee to explore.

After much discussion and debate, the subcommittee unanimously recommended the formation of a Grants Subcommittee. Finally, members were polled about their library's participation in a pilot project. Most people indicated their institutions were interested, demonstrating that this committee is dedicated to a digital reference project.

Members

Mary Slater - Chair	Missouri Valley College
Lynn Cline	SMSU
Terry Austin	MCO
Axie Hindman	MCO
Tena Barratt	William Woods
Susanne Boatright	KC Metro Comm. College
Cindy Cotner	UM-Columbia
Theresa Flett	St. Charles Comm. College
Gwen Gray	UM-Columbia
Linda Harris	MO State Library
Elizabeth Henry	UMKC
Anselm Huelsbergen	UM-Columbia
Lois Marshall	Lincoln University
Douglas Stehle	SMSU
Karl Suhr	SEMO
John Young	William Jewell

A NOTE ABOUT SOFTWARE FEATURES

Before reviewing the comparisons, listed below are some of the features that might be included in a software package and an explanation of each. Because this is such a volatile market, functionality, features, and price change rapidly. Discounts for collaborative ventures are available from some vendors.

- *Web pushing - pushing a Web page onto the user's Web browser, transferring the contents of the librarian's browser to the user's browser with just the press of a key
- *Co-browsing - the ability to interact with and control the user's Web browser; in more advanced systems, the patron can also take control of the electronic resource being demonstrated, with the results appearing in the librarian's browser
- *Pre-constructed messages - often repeated messages such as the greetings screen and the sign-off message
- *Knowledge base - database of frequently asked questions
- *Logging and statistical reports - System use, patterns of use reports
- *Seat - an individual login. Some vendors charge "by the seat" for additional logins that allow you to have more than one librarian on live virtual reference duty.
- *Voice over IP - ability to add voice communications to the session without the use of a telephone. Both the user and librarian must have computers equipped with speakers and microphones.