VIRTUAL REFERENCE UNDER CONSTRUCTION

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Virtual reference gives us a lot to talk about. It is at an evaluative and critical stage. Virtual reference was born from two major developments in the 1990's: the emergence of the World Wide Web as an information resource and the migration of library content and services to the Web. Few expected that people all over the world would use the internet and begin to expect to find what they need. According to the Pew Internet Report on "America's Online Pursuits," "More than eight out of ten online Americans say they have searched the Web for answers to their questions. That translated into 98 million Americans who had turned to the Web for their queries in September 2002"[1] alone.

Reference, serving the public, has been significantly impacted by the rise of the Internet. Libraries have taken on the burden of developing online interfaces and adding content that would meet the patrons' expectations of everything else they may find online. With the online catalog and other services available on the library Web site, supplying contact information seemed a natural

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[1] Madden, M. (December 22, 2003) "America's Online Pursuits: The changing picture of who's online and what they do." From Pew Internet Report. Retrieved November 19, 2004, from http://www.pewinternet.org/pdfs/PIP_Online_Pursuits_Final.PDF. p.17

progression. According to the Web search engine AltaVista, as of August 1996 there were "about 400,000" Web pages containing the phrase "under construction."[2] Last week, with a Google search, I found about 11 million. The World Wide Web is a very dynamic space with Web sites coming, going, and disappearing every day. Over a decade ago, libraries started putting up Web pages that would virtually represent them. These sites had a photograph or image, and some information about the library's hours or services. Then some added content, like an online catalog, recommended links, or digital collections, which attracted new patrons and Web surfers. We, who work with virtual reference, think of ourselves as pioneers or visionaries, who bring librarians to meet patrons in this space.

To librarians, this came to be known as the concept of "point of need," coined by the late Anne Lipow, past director of Library Solutions Institute and Press. Even if patrons need to know that not all of their needs can be met online, this is still a need. In 1999, at the Information Online conference in Sydney, Australia, Lipow said that point of need reference distinguishes librarianship and, in turn, we must serve remote users at the place where they are when they ask questions.[3]

Five years later, and after a decade of maturation, from email to the most sophisticated chat, recent articles like Linda Arret and Steve Coffman's[4] cause the reference community to step back and look at what it has achieved thus far. In July and September of this year Arret and Coffman placed a two-part article in Searcher magazine called, "To Chat or Not to Chat," which suggests that

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[2] Poskanzer, J. (n.d.) The Under Construction Page. Retrieved November 24, 2004, from http://www.acme.com/jef/construction/

[3] Hawkins, D. (March 2001) Information Online & On Disc '99: Australia's premier information industry event again gets high marks. *Information Today, Inc.* Retrieved November 30, 2004 from http://www.infotoday.com/newsbreaks/nb0301-1.htm

[4] Coffman, S & Arret. L. (July/August 2004) To Chat or Not to Chat - Taking Another Look at Virtual Reference, Part I. *Searcher, 12*, 7. Retrieved December 4, 2004, from http://www.infotoday.com/searcher/jul04/arret_coffman.shtml

chat services are not for every institution. Chat can be very costly and in some cases the numbers of patrons are low and still dropping. As librarians, we are challenged to remember the patrons—the reason for providing services. Patrons need more than a pile of resources—there is plenty of that online; they need assistance.

What would be the best way to provide that assistance? What is the very best way libraries can offer reference? Does it make sense to offer chat services for patrons in the library building? Or to remote patrons who do not have access to your library's physical collection? The answer depends upon your patrons, your staff, and your collection. There are multiple paths for providing reference services. Virtual reference tools have just created more avenues. Virtual reference is still just reference! The trick is finding the best combination of services for your library.

Virtual reference has added email, chat, Web forms, instant messaging, and text messaging into the reference toolbox. I want to explain the difference between two main kinds of virtual reference: asynchronous and synchronous. Asynchronous means "out of sync," where a patron will submit an inquiry and a response will be received at a later time. The best example of this is email. Instant messaging is a synchronous exchange with someone over a computer network. Two or more people can type at the same time and share messages as if you were talking in a conversation. Chat is a glorified version of instant messaging that may include applications that allow page pushing, co-browsing, or video and voice sharing.

The Library of Congress reference staff first stepped out into the electronic environment in 1994. The Library started providing email support for users of the Web site and online catalog, and in 1998 for the American Memory digital collection. In 2000, Diane Kresh, Public Service Collections Director, launched the Collaborative Digital Reference Service, better known as CDRS. This project encouraged national, academic, special, and public libraries to share reference questions with one another for the first time. Each participating library completed a profile that highlighted their language, format, subject, and geographic strengths. As librarians entered questions into the system, they added metadata that was

matched against the other libraries profiles to automatically route the question to a corresponding institution that could answer it. Then the question and answer sets were retained in a Knowledge Base.

As the Collaborative grew to about 250 libraries, the Library of Congress could no longer support the information architecture of such a project and entered into a partnership with OCLC (Online Computer Library Center). In the spring of 2002, QuestionPoint was born. QuestionPoint is a subscription Web based reference management software package. It is largely customizable and includes options such as Web forms, chat, patron surveys, reporting tools, cooperative groups, and different levels of permissions. The global component is the continuation of CDRS, the Library of Congress' contribution.

At the same time that the Library of Congress implemented QuestionPoint, live chat software became increasingly popular. The focus of QuestionPoint was not solely on chat, although it does contain a chat component, but was focused instead on asynchronous communication and managing reference as a whole. This has made QuestionPoint a very different tool with little competition. QuestionPoint launched with more functionality than CDRS, like chat. It added a component that included Web forms for patrons to submit questions and give information such as their education level, their purpose, and location. Email addresses were removed from the Web site and replaced with Web forms, thus cutting down dramatically on email spam, and implementing a kind of virtual reference interview.

When the QuestionPoint software was implemented at the Library of Congress, it was the beginning of institution-wide digital reference and was named the Ask a Librarian service. A few libraries started up homegrown virtual reference services and tried to create an original name for the service. In the end, the community discovered little incentive for individual institution branding. In order for libraries to establish a presence online, it is wise to collectively make known the fact that library service is available, instead of competing against one another for a recognizable name (e.g. Answerland, QandAcafe, Ask Away, Mad Scientist, Joan of Art, etc.). Thus, the Library of Congress settled upon a generic name

for its virtual reference service that is both logical to the patron and promotes all libraries.

A few years ago, when virtual reference software became available, it, like CDRS, was built on the notion that doing reference together is better than doing it alone. Initially, the objective was to be able to provide answers to questions like the Internet does—24 hours a day, seven days a week, using people all over the globe to cover off-hours. In order to be truly 24/7, asynchronous answers would have to be sent out pretty quickly, so 24/7 has evolved to mean chat. A few hundred American libraries provide 24/7 reference services now, and they report a dramatic increase in queries during regular library hours. Chat serves as a point of contact, in which patrons may then be transferred to email or phone for their answer later. It seems that patrons are not really as interested in getting answers immediately so much as they are interested in making a connection.

It is becoming clear that search engines are not our enemy, nor our competition. The Internet is successfully used to answer quick questions about stocks, weather, and movie times. However, if someone has an assignment or research project, they may be quickly overwhelmed and confused with the information available online. This is where librarians are needed. Librarians help form search strategies and find reliable resources. The human component is not going to go away.

Collaboration seemed the perfect answer to budget cutbacks, limited resources and staff. The tools have sparked library alliances at an unprecedented level: district-wide, statewide, nationally and internationally—all sharing patrons. Virtual reference has given libraries the opportunity to expand our patron base and resources, and to promote libraries and collections.

With the advent of the Internet, the Library of Congress took advantage of this opportunity to share some of these collections with the nation and the world. With well over eight million documents, photographs, recorded sound, and maps digitized and accessible online in the American Memory collection alone, patrons are visiting the Library of Congress Web site from the farthest corners of the world. A Library of Congress publication recently stated, "The Library of Congress has collected, preserved,

and made freely available the resources of what has grown into
the world's largest library. In fulfilling its mission to 'sustain and
preserve a universal collection of knowledge and creativity for
future generations,' it has assembled an unparalleled record of
the nation's collective memory."[5]

Each day the patron base of the Library of Congress is diversified
because more people find Library of Congress material online than
accidentally wander into the building on Capitol Hill. This suggests
the power of the Web search engine. Anyone who can access the
World Wide Web can access the Library of Congress' Ask a Librarian
service and ask any kind of question. This is a major concern for
some reference staff and research specialists who are now answering
questions that come from children and far away nations with few
resources. As a result, it is a great challenge to meet patron needs
and expectations. What would you expect from the Ask a Librarian
service of the largest research institution in the world?

The number of Web site hits on the Library of Congress' home
page in 1995 was about 23 million, one billion in 2001 and more
than two billion in 2004. Correspondingly, in the same years, the
Library of Congress received over 2,000 online inquiries in 1995,
and over 34,000 are projected by the end of this year (for
QuestionPoint reference sections only). As more and more
questions were coming in online, the Library of Congress found it
had more and more challenges. Decisions had to be made about
librarian privacy, satisfactory turnaround times, who distributes
questions, which divisions support general Library functions, how
long to keep records, what kind of data to collect, and whether or
not to chat. Advisory groups, support groups, training materials,
and best practices were developed. The Library of Congress is
finding new ways to manage and guide patrons through the
Library's Web pages. Workflow and answers are starting to
standardize across Library divisions and internal collaboration is
becoming easier.

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[5] Lamolinara, G (October 2004) The National Digital Library at 10: The
Library Extends Its Reach Worldwide. *The Library of Congress Information
Bulletin, v63n10,* p.195

The challenge for librarians is to use our traditional strengths to build new programs and leverage the strengths of the library community to redefine the role of librarians in the Internet age. The Library of Congress is accumulating new kinds of collections to support due to increasing digitized and born digital materials; reference librarians are creating online finding aids and Web guides. A new group of patrons are accessible from a distance, posing informal questions that are more for their general interest than for any specific purpose. There are more opportunities for disabled patrons.

Reference practices are changing. Now that reference transactions are documented in their entirety, they can be easily analyzed to identify trends and quality. One question is clear: Are librarians in the business of giving answers or giving instruction and guidance? Some of the issues involved in virtual reference are similar to issues in traditional reference such as: confronting fair use laws with licensed databases and copyrighted material, determining who should have access to the service, assessing quality, ensuring accuracy, as well as sustainability. These barriers have to be overcome by the reference community as a whole.

Despite the sharp increase in queries when the Ask a Librarian service first began, the Library of Congress' number of online queries is leveling out. Some libraries are offering reference in-person, via phone, email, and chat. At the Library of Congress, in-person reference is still offered, but in the virtual environment only Web forms are offered consistently. About eight divisions started offering chat for two hours a day in 2002 and some librarians never met a chat patron during their shift. As a result, administration found it difficult to obtain staff buy-in for chat services. Staffing resources is one problem; wanting patrons is another.

The Library of Congress is looking for new ways to focus online users on the collections that make it special. The Library is starting to consider marketing its collections and services to its patrons and targeted groups. This year, a group of reference staff created bookmarks to promote the Library of Congress Ask a Librarian service at the National Book Festival in October. Virtual reference allows libraries to use different services to pursue different audiences. Link placement, name and logo branding, and proper

publicity are important aspects of a successful service. Professional jargon, poor navigation, and deep linking are good deterrents. I believe good reference is the best marketing.

The Library of Congress has seen a significant decrease in the number of chat sessions since February of this year. Chat services are only offered from 2:00 to 4:00pm EST, so one thing the Library could be doing in order to help raise those numbers is to extend the hours of chat. In a QuestionPoint report on the number of chat questions that come in after hours within the last three months, there have been 695 requests to chat with the Library of Congress, which is actually more than the number of successful chat transactions accepted in the last three months.

To try to learn more about patrons' expectations and behaviors, the Library of Congress is currently undergoing a massive evaluation using an outside contracting company to analyze all patron data in all service areas. According to some patron survey data from the QuestionPoint system, 77% of questions on the patron survey received a positive response in the last year and a half. One of the questions on the patron survey asks patrons if it is their first time using the service. Eighty-six percent of them said yes. It is difficult to determine from these numbers whether repeat patrons have completed an adequate amount of surveys that would provide conclusive numbers on exactly how many of the Library of Congress' patrons return to the service.

Jeff Penka, Product Manager for QuestionPoint, wrote that it is "critical for libraries to understand the current technological landscape and to have an articulate vision of the customers or patrons they intend to serve. Without this clarity, technology—rather than vision and needs—may end up driving change."[6] Libraries are not the first to provide customer service through technology. Librarians may have something to learn from the example set by other industries. New technology and tools have enhanced the way in which libraries are able to deliver information, however

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[6] Penka, J. (February 2003) The Technological Challenges of Digital Reference: An Overview. *D-Lib Magazine v9n2*. Retrieved November 15, 2004 from http://www.dlib.org/dlib/february03/penka/02penka.html

concepts not tools should be the driving force. There is no perfect tool. Reference today is increasingly complex as librarians are utilizing the World Wide Web, subscription databases, catalogs, varying formats, OpenURL tools, and email; encountering issues like copyright, policy revision, licensing, and digital preservation. As a result, staff training is now focused on a number of different applications—tools instead of collections.

In an article in Reference & User Services Quarterly last year, Dr. E. Sierpe wrote, "The challenges faced by the profession are not necessarily related to the introduction of new technologies. The challenges center on the promotion of an ideology and culture where technological imperatives are becoming increasingly influential in governing our profession."[7] This could be extrapolated to suggest that, in some cases, virtual reference services are not necessarily a result of patron demand. This leads the library community to ask questions about how libraries arrived at this juncture and consider core values and core competencies in librarianship.

Everything libraries have done before the digital explosion is not going away, but neither is the Internet. Take advantage of the opportunities it presents. A good approach is to start rethinking priorities and involve staff, especially volunteers. "Presumably, the goal is to provide outstanding information services for the user community,"[8] and digital reference service is one strategy. Virtual reference is under construction all over the world. As libraries are experimenting and learning from one another, the community has come to a point where libraries are able to gather enough data to begin to establish trends. In sum, virtual reference continues to challenge libraries to learn about themselves and define themselves in new ways.

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[7] Sierpe, E. (2003) Transformations of Librarianship in Support of Learning Communities. *Reference & User Services Quarterly v43n2*, p. 123

[8] MacAdam, B & Gray, S. (October 2000) *A Management Model for Digital Reference Services In Large Institutions* presented by Barbara MacAdam and Suzanne Gray at 2nd Annual Virtual Reference Desk Conference in Seattle, WA. Retrieved December 1, 2004, from http://www.vrd.org/conferences/VRD2000/proceedings/macadam-gray1-01.shtml