

## **VIRTUAL REFERENCE ADVISORY COMMITTEE**

February 24-25, 2003

CCLA Offices

Tallahassee, Florida

### ***MINUTES***

#### ***MEMBERS PRESENT***

Beth Watson (TBLC), Lucy Harrison (CCLA), Pat Barbier (St. Petersburg College), Dan Lhotka (State Library of Florida), Ramona Miller (Santa Fe CC), Leslie Jones (Pasco County Library System – Hudson Regional Branch), Olga Koz (Largo Public Library), \*Debra Sears (State Library of Florida), Andrew Breidenbaugh (Tampa-Hillsborough County Public Library System), Rhonda Smith (Lake-Sumter CC), Matt Burrell (Gulf Coast CC), Andrea Ginsky (Sarasota County Public Library), Judy Born (Manatee CC), Tina Neville (USF), Barbara Roberts (Miami-Dade CC), and Lisa Nickel (USF).

\*Attended on 2/24/03

#### ***OTHER ATTENDEES***

CCLA staff: Ann Armbrister, Lisa Close, Paul Donovan, Dave Whisenant, Linda McCarthy, Margaret Pugh, Liz Richardson, Mike Ryan, and Thom Saudargas; Diana Sachs (TBLC); \*Mark Flynn (Florida Electronic Library)

\*Attended on 2/25/03

#### ***MEMBERS ABSENT***

Barry Baker (UCF), John Callahan (Delray PL-FLNC)

#### ***CALL TO ORDER***

Lucy Harrison called the meeting to order at 9:00 a.m.

## ***WELCOME***

Deputy Director Armbrister welcomed the Committee. She expressed appreciation to members for their work and dedication to the project. She indicated that the project was exciting and had attracted a great deal of interest.

## ***INTRODUCTIONS***

Members introduced themselves.

## **APPROVAL OF MINUTES**

The October 28, 2002 teleconference minutes were approved.

## ***OVERVIEW***

Where Are We Now? Harrison gave an overview of the project to date. She reported that the servers have been configured, and the software interface would be installed soon. The agreement with Docutek has been signed. She commented that Docutek has been very responsive to CCLA's requests. The hardware will consist of a test server, main server and co-browser server.

Harrison provided an update on the project's staff. The advertisement for a full-time coordinator (position will be housed at CCLA) has been posted. Bruce Dennison has been hired in the half-time System Administrator position. He will be responsible for the server configurations and software installation. Paul Donovan has been hired as Web Developer Programmer (working on front-end interface of software).

Harrison summarized some previous decisions made by the committee:

- Collaborative reference desk would be staffed by librarians from participating institutions, with a minimum of two librarians covering each scheduled time (one public, one academic, when possible)
- Operational hours would be from 10:00 a.m. – 10:00 p.m., 7 days a week
- Live local and email reference would be available through Docutek (local staffing and scheduling would also be available)
- Local services would be a customized interface with the collaborative service (email reference and chat options are available)

- Link to live chat would appear if someone is available to answer questions (for both local and collaborative)

Harrison reviewed a list of suggestions to the email management system – list has been sent to Docutek.

The knowledge base will have a limiting option to a particular institution. Librarian only information can be included, as well.

***NEXT STEPS***

Additional Project Revision. Harrison outlined the next steps: (1) beta testing is planned for April/May, (2) training is scheduled for June, and (3) the initial 40 libraries will go live in July. She reported that a project revision had been submitted and approved to the LSTA program, which will expand the project to include additional libraries. Monitoring and scheduling software will be purchased, as well.

Second-year Grant Proposal. The second-year draft grant proposal is due March 15, 2003. Year-two goals for the project are to: (1) continue to build the infrastructure and support for the collaborative service, (2) continue to build/expand local services, and (3) work with NISO Committee on General Reference Standards.

**Timeline for Year-Two**

<b>Month</b>	<b>Activity</b>
October 2003	Install software for second phase libraries
	Develop plan for promoting the service statewide
	TBLC take lead in developing online tutorials for ongoing staff training
December 2003/January 2004	Second phase libraries will go live
April 2004	Purchase remaining local licenses from Docutek
	Mid-year report due
May 2004	Market/publicize the service statewide

	Upgrade software
June 2004	Report testing results of standards
July/August 2004	Analyze statistical reports for the first year (will have a full year of statistics)

### ***REFRESHER DEMO OF DOCUTEK/FEEDBACK***

Harrison presented an overview/demo of the current Docutek demo site. Members participated in the presentation by asking questions and stating concerns.

Staff at CCLA will manage the statistics for the collaborative service.

#### Feedback

- Are email addresses accessible through Spam?
- Resolve issue of patron browser window shutting down at the end of chat
- Audible alert to inform the librarian when a returning patron has a comment (when the librarian is assisting more than one patron)
- Add spell check to knowledge base and email
- Add another link to local knowledge base (link must be clear to patrons)
- Knowledge base – address categories and sub-categories maintenance

### ***DEMO OF DRAFT FRONT-END/FEEDBACK***

Harrison presented an overview/demo of the draft front-end interface. Members participated in the presentation by asking questions and stating concerns.

#### Feedback

- Install one chat button to take the patron directly to the local /collaborative service. If a local librarian is unavailable, have another link to indicate that patron is chatting with a collaborative librarian. If neither is available, a placeholder with hours for local/collaborative chat should display.

## ***OTHER DEMOS/FEEDBACK***

Scheduling software. Harrison presented a demo of the scheduling software for the collaborative and local desks. Local desk schedules can be viewed and modified by staff at the institution. Collaborative desk schedules will be managed by TBLC.

### Feedback

- Knowledge base will contain local information (i.e., hours/addresses, etc.) as well as an FAQ built from patron questions.
- Contact information will be included on the customized front-end interface. Display a link on page to direct patrons to the policies/procedures. Main options on this page will be to chat, email and search the knowledge base.

## ***BRAINSTORMING – OTHER ISSUES FOR DOCUTEK***

- Investigate if batch emails can be used for sending information about expired knowledge base entries
- Expired entries should be removed from public view

## ***MARKETING/NAMING DISCUSSION***

Getting Buy-in. Watson distributed information developed by TBLC Marketing Consultant Jim Scilligo as background for the discussion. Feedback from previous discussion was used in preparing the document.

### Feedback

- Primary colors may blend well with libraries existing colors (post color options on the web page for preview)
- Members preferred the first logo (“Ask A Librarian” – large ASK) with scripted message: “A real person. Real help. Only a click away.” Would like to see other logos, variations on color, etc., before making a final decision.

Members discussed ways to market the service:

- Provide promotional materials, which can be downloaded/customized (use templates)
- Make available an online demo page with the institution local information
- Promoting the service in Cyber/Internet café

- Chamber of Commerce web site
- School Media Specialist
- Press releases to media
- Presentation at ALA 2004 Conference in Orlando

### ***TRAINING***

Watson discussed training aspects for the service. Preliminary training sessions will be held in June 2003 and will consist of several components (i.e., software, good online librarian tips, resources (pathfinders) to use online, consolidated searching, etc.).

Mandatory face-to-face training sessions will be held at TBLC, CCLA, and at locations statewide. Online tutorials and practice sessions will be developed, and a database of frequently asked questions will be created.

Members discussed providing certification for training (for all librarians or train-the-trainer type certification).

### **Feedback**

- Open initial training to all - do not limit the number of participants that an institution can send to core training
- Schedule onsite training at library sites and/or regional
- Have practice areas at CCLA and TBLC for staff use
- Core training mandatory for individuals staffing reference desk
- MLS not required for person staffing the desk – reference training preferred/desired
- Develop online training module (offer to MLC)

Concern: Keeping skills up-to-date after the initial training (formalize practice sessions with TBLC staff)

Several members volunteered to participate in the beta test: Miller (Santa Fe Community College), Roberts (Miami-Dade Community College), Jones (Pasco County Library)

System), Nickel (USF/Tampa), Smith (Lake-Sumter Community College), Barbier (St. Pete College), Koz (Largo Public), and Burrell (Gulf Coast Community College).

Born (who is also a member of CCLA Library Programs and Services Committee-LPSC) commented on a reference baseline assessment that the LPSC is preparing to conduct. The LPSC would like to explore the impact of providing virtual reference services. The committee would like to pilot the survey in the summer for a fall distribution.

Sachs (TBLC), Breidenbaugh (Tampa-Hillsborough County Public Library System) and Barbier (St. Petersburg College), and Born (Manatee Community College) volunteered to meet for discussion on the subject/formulate ideas, and provide feedback to the LPSC.

Harrison reviewed a list of measures that Docutek offers for collecting reference statistics.

Issue: How long will it take to answer an online question? Workload should be considered. Check with Docutek about adding another entry: Amount of time spend answering questions?

### ***REVIEW OF DISCUSSION FROM 10/03/02***

The Guidelines for the Service document was updated.

#### Accessibility

- Check w/Docutek re: the download (can configuration button be modified?)
- Establish “recommended” technical requirements for project
- Check w/Docutek re: the speed of connection
- Recommend that institution can remove the logo - cannot rename or customize the button
- Make recommendations for where the button should be placed

### Prompt Turnaround

- Response in 45 – 60 second (librarian should send message to patron)
- Submissions to the local knowledge base should be a policy at the local level
- Submissions to the global knowledge base should be sent to Diana at TBLC.
- Expired entries should be removed from public view (Diana will get the global information)

### Clear Response

- Diana will create some initial scripts for use statewide
- Maybe used as templates for local scripts
- Only Diana can add/modify statewide scripts
- Local script modification should be a local issue

### Interactive

- Include name, question, submit button, and other optional fields
- Other optional fields for collaborative service: Age (use standard age range breakdown), email, and zip code.

### Instructive

- Try to use instruction, when possible.

### Privacy

- More research - “log-on name”
- Within 30 days after a call is closed, personal information (name/email) should be deleted.

### Reviewed

- Perform random selected reviews and handled on a case-by-case basis
- Recognition for good reviews
- Review committee should consist of individuals who actual perform the service (volunteer-basis)

### Provides Access to Related Information

- Use reference materials in knowledge base as a bookmarks
- Methods of accessing the library should be contained in the FAQ's – everything else go into knowledge base

### Publicity

- Working on plan for publicity
- Don't tie publicity to commercial enterprises unless clearly educational/library-related
- Hold-off on publicity until participants are ready and comfortable

### Staffing

- Refer all "can't fill it at last minute" situation to staff at TBLC

### Hours

- Once running, monitor the statistics and base ongoing hours on actual use of system
- Conduct preliminary survey to determine each institution preferred hours (include # of hours) for staffing the desk
- No staffing on Federal holidays (monitor to see if there is a need)

### ***REMAINING BUSINESS & ADJOURNMENT***

The next meeting will be held at TBLC/Tampa – date(s) TBA. The Committee meeting was adjourned at 11:45 a.m.