Online Lifelines: Virtual Communications & Reference for Distance Learners

Nancy Skipper, Reference Librarian

Virginia Cole, Ph.D., Reference & Digital Services Librarian

SRLC Webinar December 2012
Today’s presenters

Virginia Cole, Ph.D.
Digital Reference Services Librarian
History Liaison

Nancy Skipper
Reference Services Coordinator
Sociology Liaison
Olin and Uris Libraries
Cornell’s Humanities & Social Sciences Libraries
Virtual or Remote Reference

- Anywhere [& anytime]
- Personalized but anonymous
- Immediate [or at least timely]
- Convenient for [off-campus] users
“Users aren’t remote. It’s the librarian who’s remote.”
Virtual / digital / remote / distance reference modes =

- Phone
- Email
- [FAQs, Web pages, guides, tutorials]
- Chat/Instant Message (IM)
- Text
Questions

■ What modes (phone, email, chat, text, other) does your library currently offer?

■ What are you considering launching, or in the process of launching?
Today’s Webinar

Introduction

**Part 1:** Planning and/or enhancing distance reference services
Discussion and Q&A

**5 minute break**

**Part 2:** Developing and sustaining distance reference services
Discussion and Q&A

**Part 3:** Assessing distance reference services
Discussion & Q&A
Part 1

Planning and/or enhancing virtual reference services
Philosophy of Virtual Reference Service

RUSA Guidelines for Behavioral Performance of Reference and Information Service Providers

RUSA Guidelines for Implementing and Maintaining Virtual Reference Services

OCLC QuestionPoint’s 24/7 Cooperative Reference’s Performance Guidelines
Service Goals

- An evolving understanding of user populations which informs evolution of services

- Best service with resources available to meet a population’s needs

- User experience, learning, and emotional satisfaction should be high
Will one (or more) of the remote services be available extended hours—in the evenings and weekends (or even 24/7)?
Remote or distance reference modes =

- Phone
- Email
- [self-service FAQs, web pages, guides, etc.]
- Chat/Instant Message (IM)
- Text
Remote reference modes

- e-mail
- phone
- chat
- text
Phone

- Efficient and effective use of time and energy
- Requires undivided attention
- Can be used in conjunction with computers
Phone as software & communication

- Be able to transfer; put on hold, etc.
- Professional, friendly, approachable tone
- Inquire – reference interview
- Be able to offer search help
- Provide instruction
- Refer or follow-up
Email

- Convenient
- Not instantaneous
- Clarity & precision can be problematic
Email as Communication

• Good judgment
• Balancing incomplete knowledge of user needs with instruction and substantive response
• A professional & friendly tone
• Referral or move to another mode
Email software & workflow

• Know how to use the program—reply, forward, attach, link, etc.
• Establish staff workflows
• Establish guidelines, timeframe, etc. for responding
Email efficiencies
For Distance Students & Faculty

Are you in an online program? A UA South student? Studying abroad?

For whatever reason, if you can't make it to campus—don't worry! We can still support all of your research needs.

Need a book?

Just because you don't live near campus doesn't mean you can't access the millions of books through the library. We deliver!

Even if we don't own a particular book, we can get it for you from another library.

The cost is $6 for the first book and $2 for each additional book, plus shipping and handling. This fee is waived for UA South students. (Be sure to include your shipping address in the note area of the request form.)

Request a book

Need a book chapter or journal article?

Sometimes, you need an article that we don't have access to online. Or maybe you want to go to the copy center to make a quick print of a class assignment. We can help with that, too! For more information on copying or making copies, visit our Copying Services page.
FAQs or Web pages for users and librarians
Chat/Internet Message
Chat/Internet Message Software

- Automated messages
- Scripts & urls
- Capture user’s email
- TRANSCRIPTS!!!!!!!!!!!!!!!
  - Store & send transcripts
- Protect user privacy
- Statistics and reports!
- Screen-sharing technologies are great but not the only way!
“Hello. Your librarians are not online right now; I’m helping them out by answering questions. I’m reading your question....”

"Useful career information can be found in the Bryant & Stratton Virtual Library. Login to the Virtual Library and select the menu item 'Career Planning'--the item 'Helpful Tools' contains links to useful web resources while the item 'Research Databases' contains a link to the EbscoHost database 'Vocational & Career Information.' Another good source is the document "Career Resources Guide" available at vl.bryantstratton.edu/Portals/0/CareerResources.pdf."
### Queues

<table>
<thead>
<tr>
<th>Librarian</th>
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<th>Queue Type</th>
<th>Active</th>
<th>Time</th>
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<td>A Brookly</td>
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Chat/Internet Message Software

- Know the software
- Comfort with the software in high pressure situations

- Develop technical & workflow workarounds for needs that the software can’t handle
Chat/IM Communication Behaviors

- Approachable, interest, friendly, professional
- Reassuring, non-confrontational
- Inquire – reference interview is crucial
- Balance user’s time & interest with providing substantive response
- Maintain contact
- Aim to instruct and offer search help
- Follow up & refer
Chat/IM

Con: Staff may feel chat is inefficient-- the amount of typing, the feeling they can’t express themselves as well as in person...

Pro:
But can assist multiple patrons simultaneously
Chat/IM

Users can control the pace of the interaction and learn at their own speed!

User satisfaction can be very high!
Text software

- Autoresponders
- Counting characters
- Scripts & urls
- Tiny url
- Footers
- Protection for user privacy
- Be able to follow-up with user
- Statistics and reports!
- Transcripts!!!!!!!!!!!!!!!!
### Monthly Conversation Count - culib

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<thead>
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<th>Month</th>
<th>Total Incoming Texts</th>
<th>Distinct Patrons w/ a Conversation</th>
<th>Number of Conversation Threads</th>
<th>Number of Follow-ups in Threads</th>
<th>TFI Sent (Text For Instructions)</th>
<th>First Time TFI</th>
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<td>8</td>
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</table>
Texting

- Approachable
- Reassuring, non-confrontational
- Inquire – reference interview
- Offer search help
- Instruct as much as possible
- Follow up & refer

All in 140-160 characters!
are there mac laptops and chargers available for renting at the ives library?

[Translate]

patron858767 (1 Q)
Fri Feb 12, 2010 12:26pm

You mean the ILR library? Unfortunately no, they do not have any laptops for loan.

jpc27 (0 Q / 7 A)
Fri Feb 12, 2010 12:35pm

Hi. Mann Library Circulation Desk lends Mac laptops and chargers. 255-3296. Open till 2am. today. nss3

okuref (0 Q / 33 A)
Tue Feb 16, 2010 11:14am
where do i find information on how to cite scientific studies for my nutrition health and society paper?

[Translate]

patron3075 (1 Q)
Wed Sep 16, 2009 4:59pm

Hi. By cite you mean list studies in your bibliography & refer to them in your paper? Try APA style http://www.library.cornell.edu/resrch/citmanage/apa.
Mann Library 607-255-5406 mann_ref@cornell.edu

okuref (0 Q / 33 A)
Wed Sep 16, 2009 5:03pm

Comment to okuref
New, and not so new, technologies?

- Twitter, Facebook, Google Plus...
- Skype, videoconferencing...
- Jing, screencasting...
- Second life, augmented reality...
- Others?
Staffing Challenges
Who?
What?
When?
Where?
How?
Tiered staffing

- Confer
- Consult
- Refer
Cooperative or collaborative service: Guidelines for Cooperative Reference Services

- Mission
- Service
- Communication
- Quality
Where?

- Reference desk?
- Office?
- Other space? (digital reference services space)
How Do I

- Search Library Catalog
- Search Journal Articles
- Cite Sources
- Conduct a Literature Review
- Schedule a Research Consultation
- Sign-up for a Workshop or Tour
Tutorial: Research Minutes Series

“Identifying substantive news articles”
Culture and Politics in the 1960s

Inaugural Address of John F. Kennedy, 35th President of the United States.
End of Part 1 of 3!

Questions ? Comments?
Discussion?
Five minute break

Let’s all stand up and stretch!
Developing and sustaining distance reference services
Training
- Service Philosophy
- Buy-in
- Motivation
<table>
<thead>
<tr>
<th>Patron</th>
<th>Queue</th>
<th>Question</th>
<th>Librarian</th>
</tr>
</thead>
<tbody>
<tr>
<td>Erika</td>
<td>B CORNELL</td>
<td>I am trying to</td>
<td>Cornell Lib</td>
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<td></td>
<td></td>
<td>COS funding</td>
<td></td>
</tr>
</tbody>
</table>
http://www.ala.org/rusa/resources/guidelines

OCLC QuestionPoint’s 24/7 Cooperative Reference’s Performance Guidelines
Quality benchmarks

- Greeting
- Reference interview
- Resource selection
- Level of search assistance
- Interpersonal communication skills
- Concluding the session
Sharing Transcripts for Learning

Chat Transcript:

**Patron:** I am trying to find the following article: Dynarski, S. and J. Gruber. 1997. "Can Families Smooth Variable Earnings?" Brookings Papers on Economic Activity

**Note 1:** Patron's screen name: Michael

**Librarian 1:** Librarian 'Cornell Librarian 1' has joined the session.

**Librarian 1:** Hi Michael, is this an article in a journal or a book?

**Patron:** It's in a Brookings Papers on Economic Activity volume

**Librarian 1:** got it.

**Patron:** I think it is considered a book

**Librarian 1:** One moment, did you look up the Brookings papers in the catalog?

**Patron:** I tried to...
Coaching/Shadowing/Observation

- Support
- Assist
- Encourage
Flying solo

But don’t be too far away
• Suggest
• Guide
• Encourage
• Trust
Share
Strategize
Hi all,

Jim, I've added your suggested script.

As a refresher, here are our scripts. They are grouped loosely by the order you'd use something like this list). I try not to have too many because scrolling is a pain.

Below the scripts are the URLs. Tip: when you send a link that begins with http:// the right thing will happen when you click the link to them for later, but you don't want their browser to refresh because you've already seen the link and the link will be available to them in their email later. (You can send them script “3a. transcript” like this if you prefer)

<table>
<thead>
<tr>
<th>Name</th>
<th>Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a. hi I'm reading... Cornell collections.</td>
<td>Hello and welcome. This service is for Cornell's Ithaca</td>
</tr>
<tr>
<td>1b. hi how can I help? Cornell collections.</td>
<td>Please let us know if you're a Cornell alumnus. I'm ready to help.</td>
</tr>
</tbody>
</table>
Promotion & Marketing
Chat 10th Birthday Party

Chat Reference's 10th Birthday Party!

On Thursday, April 8, 2010, at 3pm, Olin LibeCafé, chat reference celebrated its 10th birthday with cake and a round of "Happy Birthday!"

http://www.library.cornell.edu/ask/chatbirthday
Ask a Librarian Inside databases

Search results for 'procopius' limited to Libraries Worldwide

Results 1-10 of about 2,495 (.66 seconds)

1. Procopius, by Procopius.
   - Book
   - Language: English
   - Publisher: London: W. Heinemann; New York: G.P. Putnam's Sons, 1898.
Search Results: Your search for procopius returned 19,266 results.

Refine your search
- Items with full text online
- Limit to articles from scholarly publications, including peer-review
- Exclude Newspaper Articles
- Add results beyond your library's collection

Procopius
by Procopius
1914
History, Justinian I, Emperor of the East, 483?-565, Justinian I, 527-565, Byzantine Empire

eBook: Full Text Online
Chat 24/7: try our chat reference service available 24 hours a day, 7 days a week!  [http://www.library.cornell.edu/olinuris/ref/askalib.html](http://www.library.cornell.edu/olinuris/ref/askalib.html)

Note: Cornell Librarians are online:  Mon.-Fri., 10am-5pm.  After hours, or when Cornell librarians are busy helping other patrons, non-Cornell librarians can provide basic help.  Your question may be referred back to Cornell librarians for follow-up by email or phone.
In-house Promotional Material

Posters, Table Tents & Business Cards
Designed by Laura Larrimore,
Communication Specialist at
Albert R. Mann Library
Twitter

CU Olin Library

@OlinLib

Services and resources at Olin and Uris--Cornell's humanities and social sciences libraries
Cornell University, Ithaca, NY - http://olinuris.library.cornell.edu

Tweets

Following
Followers
Favorites

CU Olin Library @OlinLib

Need help with a project or paper? Cornell Librarians can help. Ask a Librarian: library.cornell.edu/services/askal...

Expand
In the “classroom” during library instruction
Promotion, marketing

- Library Web Site
- Inside databases
- Through email, newsletters, blogs, social media, etc.
- Orientation mailings, email, fairs, etc.
- Library instruction
End of Part 2 of 3!

Questions ? Comments?
Discussion?
Part 3

Assessing Remote Reference Services
Measuring and Assessing Reference Services and Resources: A Guide

Prepared by RUSA/RSS Evaluation of Reference and User Services Committee

Introduction

Measuring and Assessing Reference Services and Resources: A Guide offers an expansive definition of reference service, assessment planning advice, and measurement tools to assist managers in evaluating reference services and resources. The measurement tools presented here are fully analyzed for validity and reliability in The Reference Assessment Manual, RASD and Pierian Press, 1995. Where formally validated tools were not available, bibliographic references to assessment methods reported in the literature are provided.

For a more comprehensive analysis of reference service assessment, consult these key reference works:

Additional Assessment Resources

http://quartz.syr.edu/rdlankes/Publications/Books/Quality.pdf
Assessment
What are your goals?

- General planning?
- Service improvement?
- Resource development?
- Budget advocacy?
Factors?

- Service use
- Patron satisfaction
- Service quality
Analyzing use
Analyzing modes

2012

- e-mail
- phone
- chat
- text
User feedback—surveys, comments, transcript review, thanks, etc.

Survey Questionnaire

Please select the most appropriate answer to the following questions or statements. The information that you provide will help us to improve our system better for all of our users.

** Patron Survey Form:**

**Question**

1. This was the first time I used this service:
   - Negative or No
   - Neutral or N/A
   - Positive or Yes

2. I received a better answer from this resource than I would have found on my own:
   - Negative or No
   - Neutral or N/A
   - Positive or Yes

3. Was this service easy to use?
   - Negative or No
   - Neutral or N/A
   - Positive or Yes

4. This is a needed service and should be continued.
   - Negative or No
   - Neutral or N/A
   - Positive or Yes

5. Were you satisfied with the answer you received to your reference question?
   - Satisfied
   - Not Satisfied
   - Somewhat Satisfied

6. The quality of the library staff service in answering this request was?
   - Excellent
   - Good
Transcript Review for Quality
—chat, email, text, etc.

Patron: <@cornell.edu>
Assigned: Cornell Librarian 1
Wait Time: 15
Language: English

Question:

Descriptive Codes
Reference
IP Address: 128.84.48.71
Referer: http://www.library.cornell.edu/ask
Browser/OS: Mozilla/5.0 (Windows U: Windows NT 6.0: en-US: rv:1.9.2.13) Gecko/20101203 Firefox/3.6.13 (.NET CLR 3.5.30729)
Cobrowse: No
Category: CORNELL

<b>How are you affiliated with Cornell?</b>
Student

<b>Where are you located right now?</b>
Cornell Institute for Social and Economic Research

Question History

Patron: 13:42:20 2011/01/05 (GMT-0500)
Chat Transcript: I am trying to find the following article:

Note 1: Patron's screen name: Michael

13:42:20 2011/01/05 (GMT-0500)
Librarian 1: Librarian 'Cornell Librarian 1' has joined the session.

13:42:38 2011/01/05 (GMT-0500)
Librarian 1: Hi Michael, is this an article in a journal or a book?

13:43:03 2011/01/05 (GMT-0500)
Patron: It's in a Brookings Papers on Economic Activity volume

13:43:27 2011/01/05 (GMT-0500)
Librarian 1: got it.

13:43:33 2011/01/05 (GMT-0500)
Patron: I think it is considered a book

13:43:45 2011/01/05 (GMT-0500)
Librarian 1: One moment, did you look up the Brookings papers in the catalog?

13:44:04 2011/01/05 (GMT-0500)
Patron: I tried to
Not only can reference librarians provide online lifelines for distance education students, if all goes well, we can help them learn to swim too!
Free Software for Chat

- **Trillian** [www.trillian.im](http://www.trillian.im) Trillian, the free *instant messenger* for Windows, MacOS X, Android, iPhone, BlackBerry, and the Web. Supports Windows Live, Facebook, Twitter, Yahoo, ...


- **Pidgin, the universal chat client** [www.pidgin.im](http://www.pidgin.im) A free chat client used by millions. Connect easily to MSN, Google Talk, Yahoo, AIM and other chat networks all at once.

- Twitter, Facebook, Gmail chat
Proprietary Software for Chat

- OCLC QuestionPoint
- Library H3lp
- Altarama
Text Software

- Free
  - Twitter

- Proprietary
  - Text a Librarian, Altarama, Library H3lp, etc.
  - Collaborative Texting: My Infoquest
    http://myinfoquest.info/

- More:
  http://www.libsuccess.org/index.php?title=Online_Reference
Free Wiki software for FAQs and other content

http://www.clickonf5.org/7599/10-free-opensource-wiki-software-engine/
GUIDELINES

RUSA Guidelines  http://www.ala.org/rusa/resources/guidelines
Guidelines for Information Services (2000)

http://www.ala.org/rusa/sections/rss/rsssection/rsscomm/evaluationofref/measrefguide

OCLC QuestionPoint's 24/7 Cooperative Reference’s Performance Guidelines

BOOKS
Hirko, Buff. Virtual reference training : the complete guide to providing anytime, anywhere answers.


COLLECTED ARTICLES


ARTICLES
Coonin, Bryna, and Angela Whitehurst. "The Assessment Portfolio: A Possible Answer To The Distance Education Assessment Dilemma." Internet Reference Services Quarterly 16.3 (2011): 91-97.

Coonin, Bryna, Beth Filar Williams, and Heidi Steiner. "Fostering Library As A Place For Distance Students: Best Practices From Two Universities." Internet Reference Services Quarterly 16.4 (2011): 149-158.

Thanks!

Questions? Comments? Discussion?