UC Digital Reference Common Interest Group
March 6, 2009, 9:30am-3:30pm
In-Person meeting, UCLA

In attendance: Marcus Banks (UCSF), Penny Coppernoll-Blach (UCSD), Sherry Dedecker (UCSB), Ken Furuta (UCR), Frank Gravier (UCSC), Cynthia Johnson (UCI Co-Chair), Teal Smith (UCM), Joseph Yue (UCLA)

Summary of Action Items:
- In process: Cynthia emailed Victor (OCLC) to see if staffing certain 1-hour time slots (weekend and evening) counts as 2 hours.
- Cynthia will email QP list a reminder to obtain patron email when using Qwidget (do not mark for follow up without email)
- Each campus needs to decide what hours they can open to co-op and report this to group.
- Cynthia & Lynn will write up what various marketing campuses are doing.
- Sherry will send list of typical 24/7 questions.
- Sherry will discuss with HOPS how to secure more stable staffing.
- Joseph will work on "welcome" script.
- Cynthia will email list a reminder to be aware of/monitor any QP instant messages.
- Create script to transfer patron to non-UC librarian.
- Cynthia and Ken will find out how to transfer patrons to Academic Queue.
- Cynthia and Ken will find out the process to join another librarian's chat. Is the librarian aware another librarian has joined?
- Cynthia will find out what the policy is on ignoring other campus' chat. Clarify at what point we have to pick up other campus' chat when busy (after "x" many seconds?).
- Cynthia will find out more information regarding monitoring the 24/7 queue versus other queues- how do we know which librarians are monitoring 24/7? What is the purpose of the list?
- Cynthia will email list a reminder to completely log out of QP.
- Ken will find out if campus administrators can easily force a logoff.
- Ken and Joseph will share the computer scripts that toggle Qwidget on/off on library pages.

Discussion:
24/7 Implementation issues

1. *Assessment of schedule – how do we determine what hours the UCs will be responsible for covering the 24/7 Cooperative?*

Originally, one positive to joining 24/7 was a decrease in hours on DigRef from 50 to 40 hours, but now DigRef is much busier. Qwidget is a problem because it does not roll into 24/7, but it is very popular. At time of original scheduling, we were not aware what the Qwidget's effect would be.

Irvine could add hours to daytime shifts to help with double or triple staffing; cannot double-staff on Monday evenings, except from 5-7pm.
UCLA is flexible with hours; could trade out one of the evening shifts.
UCR: Thursday nights possibly could open to co-op.

Do we not open up to co-op during hours when we know we are busiest? We have to be available 40 hours to co-op; may eventually get reported if do not respond (need to answer 75% of questions from our own campuses). Get extra hours for taking certain hours? UCs could possibly double- or triple-staff.
We should at some point revisit scheduling process (big picture).

Action: Cynthia emailed Victor (OCLC scheduler) to see if staffing certain 1-hour slots (weekend and evening) counts as 2 hours (in process).
Action: Cynthia will email QP list to remind people to get patron email when using Qwidget.
Action: Each campus needs to decide what hours they can open to co-op and report to group.

DECISION: Stay with current schedule. Cynthia will follow up with Victor.

2. Assessment of quality of answers from non-UC campuses

Cynthia has an LA who can pull a sample of transcripts from non-UC libraries and assess based on QP best practices. We could look at a small sample, too. The LA will document her process.

Close out questions: if not closed out, questions remain active for librarian who initially answered. It is our priority to close out transactions handled by non-UC service providers.

3. Marketing – how are individual campuses marketing?

How do we market this service to our campuses? Given current popularity, how much marketing do we need to do? Examples of marketing used at UC campuses: announcements, emails to campus liaisons, banners, website, table tents, Facebook announcement/ad, digital signage, press release, news article, etc.

Can add Qwidget to catalog page (display if user retrieves 0 results) (works with Innovative). In general, add Qwidget to more library pages.

How do we market this service to our librarians so that more librarians are willing to staff the service? Some are hesitant. Provide sample sheet of questions to librarians who are unsure.

Promotional materials are on the CDL instructional materials site.

Action: Cynthia & Lynn will write up what various marketing campuses are doing.

4. Training for QP 24/7 beyond the webinar? Ideas?

It is fine to get a patron started and ask that they come back if they need more help. To deal with increase in questions, we may need to re-examine how we address questions, especially in-depth research questions.

Ready reference ("quick reference") versus in-depth research. Librarians can be too detail-oriented; when busy, we may need to provide users with good starting points for their research and ask that they return to Ask a Librarian if they have further questions.

Need scripts for UC librarians to use with 24/7 (check other UC campus' scripts).

QP Best Practices: is there a limit to the number of chats one librarian can effectively address at once? Ideally the limit would be 3 to 4, but this depends on the librarian and the nature of the questions. Some campuses have the policy of handling one chat at a time.

How do we recruit librarians at each campus to cover hours? It is difficult to find and retain volunteers. If have administrative oversight, can assign chat hours. Need support of AULs (show how high stats are); we need to have more consistent staffing. Many campuses have a designated number of reference hours; if don't do chat, do more hours at the reference desk.

 Originally, HOPS said all UCs will answer questions from other UCs, regardless of whether that UC pays into the service. Davis is not involved, so they cannot display chat on their website, but we still answer questions if their users come through a different route.

While chatting, check the libraries' policy pages.

Question regarding service quality: how long until we can hang up on an unresponsive patron?

Action: Sherry will send list of typical 24/7 questions.
Action: Sherry will discuss with HOPS how to secure more stable staffing.
Action: Joseph will work on "welcome" script.

5. Discuss Policy on handling multiple chats at once.

Chat between librarians (QP IM, gTalk, etc.)? Remind librarians to monitor their QP IM.

When busy, pick up Qwidget first, answer chat second (can transfer later). Can transfer to single librarian or to Academic Queue (backup will pick up).

Action: Cynthia will email list a reminder to be aware of/monitor any QP instant messages.
Action: Create script for transferring patron to non-UC librarian.
Action: Cynthia and Ken will find out how to transfer patrons to the Academic Queue.
Action: Cynthia and Ken will find out the process to join another librarian's chat. Is the librarian aware another has joined?
Action: Cynthia will find out what the policy is on ignoring other campus' chat. Clarify at what point we have to pick up other campus' chat when busy (after "x" many seconds?).
Action: Cynthia will find out more information regarding monitoring the 24/7 queue versus other queues- how do we know which librarians are monitoring 24/7? What is the purpose of the list?

6. Transcripts tagged as Follow-Up – do we have questions for QP or do we want to send information/ideas to the QP listserv?

Make sure to "close" questions. Until closed they will hang on in other librarians' chat lists (especially do not want to do this to non-UCs). If a librarian who is monitoring followups "claims" a question, only they will be able to answer it. Answer button: other librarians can still work on it. Claim button: only you can work on it.

Refer to Subject Matter Specialist > Refer to Quality Control
Refer to email partner

When tag for follow up by patron's library, add note to aid in addressing the question.
Use policy pages. Co-op depends heavily on policy pages, so it is important to keep policy pages, links, and web pages up-to-date.

Action: Cynthia will email QP list a reminder to obtain patron email when using Qwidget (do not mark for follow up without email)

7. Logging off and Qwidgets (Ken F)

Qwidget will remain active as long as a UC librarian is logged in, so be careful to completely log out. All UC qwidgets (except UCLA (cold fusion) and Riverside, which have programmed their qwidgets to automatically turn off) will remain live if any UC librarian forgets to log off. Can campus administrators force a logoff (with minimal effort)?

Action: Cynthia will email list to remind librarians to completely log out of QP.
Action: Ken will find out if campus administrators easily force a logoff.
Action: Ken and Joseph will share the computer scripts that toggle Qwidget on/off on library pages.

Future Business:
Give 24/7 service a month, then reconvene via a conference call to discuss.

Addenda:
UC Berkeley will explore providing additional staffing.