UC Digital Reference Common Interest Group
Notes from the January 26, 2007
Meeting at UC Riverside

Present: Elaine Adams (UCLA, Co-Chair), Sara Davidson (UC M), Sherry DeDecker
(UCSB), Ann Frenkel (UCR, HOPS liaison) Ken Furuta (UCR, Co-Chair), Frank Gravier
(UCSC), Katherine Kjaer (UCI), Peggy Tahir (UCSF), Sarah Watstein (UCLA, HOPS
liaison), Alice Witkowski (UCSD)

I. Introductions: The meeting opened with introductions as this was the first in person
meeting for many members of the CIG. Ken Furuta noted that Ken Firestein would not be
able to attend after all as he was fogged in at the airport. Our new CDL Liaison, Alison
Ray, was just appointed and was unable to attend. Campus hosts Ann Frenkel and Ken
Furuta welcomed the CIG representatives. Watstein also welcomed the CIG and
expressed her appreciation for being able to attend the meeting. HOPS has a scheduled
conference call the third week of February so she and Ann will be able to bring any
digital reference concerns or questions to that group at that time.

II. ALA Midwinter Meeting reports: Both DeDecker and Davidson attended digital
reference related meetings at the recent ALA Midwinter Meeting in Seattle.

DeDecker reported on the session "Multiply your reference staff: leveraging resources
through cooperative virtual reference." The session presented a panel of representatives
from various cooperatives: Oregon L-Net, Pennsylvania AskHere PA, British Columbia
Askaway. DeDecker noted that each of these cooperatives had a full time director,
dedicated staff, and a graphic designer for marketing.

Davidson reported on the session "Intersection of Virtual Reference and Electronic
Resources." The audience of this session broke into small discussion groups. Two of the
things that impressed Davidson from her group were techniques the British Columbia
AskAway service had for dealing with multiple callers (nicely worded scripts to say "I'm
busy" and a screen to alert callers when the service was swamped), and that librarians in
the service have guest log in accounts for electronic resources available to the other
libraries in the cooperative. This launched a short discussion within the CIG about
remote access questions and co-browsing. Members wondered if the CDL could provide
Ask a UC Librarian service providers with a way to get an IP mask to look like another
campus when serving their patrons. We did consider that there might be licensing
implications.

*Action item: Furuta and Ray will consult with CDL to explore options for system-wide
authentication. Suggested timeframe: Report to CIG by March 15, 2007.*

Davidson also attended the QuestionPoint User's Group Meeting. She noted that QP
users have requested the addition of a specific section for proxy server information within
the QP policy page framework. Many institutions note a large number of incoming

questions involve the use of proxy servers. (Tahir noted that questions about remote access had decreased significantly since UCSF went to VPN authentication only.)

Action item: Adams will lead email discussion with CIG members to standardize placement of proxy information in our UC policy pages. Suggested timeframe: Decision by March 1, 2007.

Meeting attendees discussed the draft of the Best Practices document (see **http://www.questionpoint.org/policies/bestpractices.pdf**). One practice recommended for cooperatives was identifying the librarian's campus when picking up a call. For example in Ask a UC Librarian, we might say, "Hi, my name is Sara and I'm a librarian at UC Merced." Another practice recommended emphasizing time saving aspects when suggesting a search strategy. The meeting also touched on description codes and resolution codes. (Adams observed that description codes are not defined in any QP documentation and perhaps the UC collaborative would want to agree upon definitions for consistency. This is especially true if we wish to track the type of question as part of our service assessment measures.) Using description codes is optional, but using Resolution codes is mandatory and the Lost Call resolution was clarified.

Action item: Adams, DeDecker and Witkowski, as part of developing a QP training checklist, will define description codes and their use within our collaborative. Suggested timeframe: By April 1, 2007.

Davidson finished her report with information on system news and technical issues:
        *QuestionPoint is targeting May or June for a new install
        * QP is reviving their blog and putting in an RSS feed
        * If a user minimizes the chat window while waiting for a librarian response,
there is no pop to front window or audible alert on the user's side when the librarian has come back. Putting some sort of alert mechanism in place is on QP's "to do" list.

Witkowski would also like the UC collaborative to recommend QP give service providers the ability to open more than one patron window at a time. She cited meebo as an example of a service that can do this.

Note: QuestionPoint has posted notes from the meeting on their blog at http://questionpoint.blogs.com/

Action item: Furuta will ask QuestionPoint for more information about system service enhancements under development. Will they be adding voice-over-IP and/or text messaging with callers? Recommend additional enhancements (e.g. ability to open more than one patron window). Suggested timeframe: Report to CIG by March 1, 2007.
Note: For a QuestionPoint list of items in development as of August, 2006 see
http://www.questionpoint.org/web/auth/news/en/20060809/indevelopment.html

III. Campus Staffing: Furuta asked if the campus rotation is working or needs adjusting. CIG members reported staffing levels in a round robin. Many campuses reported double staffing during their assigned hours due to the volume of traffic. Most reported that calls seemed to come into the service in clumps at the first part of the hour. Campuses were divided between assigning digital reference service to all reference librarians and having a core group of librarians provide service. Kjaer had an excellent suggestion when she mentioned UCI's practice of not scheduling dig ref librarians for meetings or other commitments for 15 minutes prior to and 15 minutes after their assigned hours. This way others with access to the librarian's calendar would not schedule up against the dig ref service. Witkowski voiced the group consensus that it is important to have prompt shift changes.

After a review of the various staffing models Furuta had considered, the group adjusted the campus responsibilities with San Diego taking on two more hours (Monday and Friday 11-12), and Irvine taking two hours from Santa Barbara. San Diego will take on the two hours starting January 29, but the Irvine/Santa Barbara switch will start with the Spring Quarter. Irvine and San Diego will be experimenting with double coverage by two campuses in the Monday 11-12 hour, i.e. one librarian from each campus will be assigned to cover the hour. See Appendix: Schedules by campus.

Action item: Adams will revise and post schedules on current website (http://www.library.ucla.edu/digref/ucchat/) by February 20, 2007. Furuta will add link to website by February 23.

The group turned to a discussion of various ways to have operational information centrally available to the collaborative. Currently the collaborative schedule is mounted on a website at UCLA. What we would like to use is a space that everyone can update (like a wiki) yet is not visible to the public. With such a site, we could add specific staff names and contact numbers to the schedule in case of a delay in shift change. We could also mount service guidelines, best practices, training materials, software tips and tricks, possibly also policy pages. Furuta has a prototype wiki started with free software that has some but not all of the features we would like. Is there HOPS support to fund the purchase, development and maintenance of wiki software with all the features we need? Gravier asked what systems support might be available from CDL. Apparently CDL already hosts a wiki for one project (Web at Risk). The group agreed to try out Furuta's wiki until June, evaluate our experience and alternative software, and report to HOPS with recommendations.

Action item: Furuta will post collaborative materials such as scheduling and training information to his test wiki as complete and received. CIG members and campus staff will use the wiki and provide feedback about features. Suggested timeframe: March 1 through June 15, 2007.

Action item: Furuta will consult with Ray regarding existing CDL support services, if any, for statewide project wikis. Suggested timeframe: Report due by March 1, 2007.

Action item: Based on the CIG evaluation of the pilot wiki and CDL input, the co-chairs will draft a request for HOPS support. Suggested timeframe: Report to HOPS by July 15, 2007

IV. Service Guidelines: Adams distributed copies of the draft service guidelines emailed on January 25th. In the draft she had tried to consolidate information on collaboration operational principles, best practices for handling user calls, and other staffing and training issues. CIG members agreed that these should be separate documents.

Action item: Adams will separate out service guidelines, best practices and training documentation into specific documents by March 1, 2007.

Davidson had earlier raised the question about service staff levels, i.e. must a digital reference service provider be in the librarian series or could paraprofessionals participate. Many of the other campuses use knowledgeable paraprofessionals. Adams commented, and many agreed, that staffing should be based on customer service attitude, comfort and facility with computers, as well as knowledge of reference resources and ability in the reference interview process. Many of our libraries use paraprofessionals at our face to face reference desks.

Feedback on the QuestionPoint led teleconference training suggested the session was too long and gave too much information which as not immediately useful. Witkowski and DeDecker have developed their own training checklists for new service providers. They agreed to work with Adams (UCLA) on developing a training guide for the collaboration. They suggested we also develop a "tips and tricks" sheet for the QuestionPoint software.

Action item: Adams, DeDecker and Witkowski will draft central training documentation for the Ask a UC Librarian cooperative to cover best practices and software "tips and tricks". Suggested timeframe: Draft documents ready for CIG review by March 30.

Someone asked if we had guidelines for service to the disabled, or if such guidelines had been developed by others. Ask a UC Librarian has not explored service to the disabled. At a minimum, it was suggested that we put in a statement to the effect that if the user is using a screen reader they should click on a special link to take them to the appropriate email service.

Action item: Furuta will revise viewport page with link by February 28, 2007.

A short discussion of email services ensued. Tahir reported that UCSF has a very efficient grid for referring email reference questions. (Most of their reference is either email or consultation, although they have on-call reference service.) Gravier reported that Santa Cruz uses Request Tracker for email reference desk as well as questions that come over the circulation desk. They have been using Request Tracker for about six years and it works well at tracking activity as questions move from department to

department. DeDecker asked if individual campuses could add the QP email component to the chat service, or if we might want to consider asking QP to add the service to the collaborative.

Action item: Adams will contact QuestionPoint for more information about adding the email service to campuses who wish to add that component. Suggested timeframe: Report to CIG by March 9, 2007.

V. Marketing: Under the HOPS guidelines, each campus is responsible for promoting the Ask a UC Librarian service to their campus community. Campuses with established chat services could retain their prior logo and build upon that publicity. Campuses without a prior service and logo could use the Ask a UC Librarian logo.

Putting a link to the service on the upper level library pages is obvious. (Some campuses report difficulties in negotiating for prominent placement.) But a number of other marketing ideas emerged from the discussion. For instance, UCSD put an ad on FaceBook ($25 for 5 days or 10,000 views). They also place an ad in their library "tips" newsletter, The Navigator, **http://libraries.ucsd.edu/services/navigator/NAVwin07.pdf** which comes out three times a year. UCLA has incorporated their service logo on all general handouts (library hours, campus library maps, catalog search guides, etc). DeDecker had passed around bookmarks from the various services present at the ALA session when she gave her report.

Other avenues for marketing were noted. For example, Watstein reported that the UCLA Library has been "deeded" space on Second Life. She also commented on efforts to secure a library presence within common collaboration and learning environments, such as course management. As a former member of the ASERL (Association of Southeastern Research Libraries) Ask Librarian governance, she underscored the need for marketing. The ASERL service had a central design which members could download and customize. She will raise the question of funding for marketing with HOPS --perhaps they could fund the design of a set of central pages (templates) along the ASERL model with the local campus responsible for customizing, downloading and printing.

Action item: Adams and Watstein will draft a proposal to request support from HOPS for design of central templates for marketing. Suggested timeframe: Proposal to HOPS by March 9, 2007.

VI. Assessment measures: QuestionPoint's management features provide us with various statistical measures: calls by hour of the day, day of the week, campus of origination, campus answering, duration of call, etc. Are there any additional measures we would like to see when evaluating the service?

     * Attempted logins before or after service hours. Can QP track these?

     [Note: Yes. The Chat Service Daily Report already has a line for Number of Chat Sessions Requested (After Hours). The line appears between Number of Chat Sessions Requested and Number (Total) of Chat Sessions Accepted *if* there has been any after hour's attempts during the month.]

* User characteristics such as campus and status (faculty, undergrad, etc.)
* Repeat users
* Types of questions answered. For example, how many questions are about using proxy servers for off campus access? As previously noted QuestionPoint's description codes are not centrally defined. For the original 2005 pilot, a team looked at each transcript to assess the "real" question which is frequently not the question initially asked. CIG consensus recommended choosing sample weeks to review rather than all questions received by the service.

* Obviously, we should study the QP survey results. But while reviewing the transcripts, we should also look for any expressed statements of satisfaction (or not) as many users do not fill out the official survey form. And when reviewing intercampus transactions (i.e. librarian and caller from different campuses) we should also note any user comments relating to that aspect of the call.

* Survey staff providing service for their satisfaction. We could draft some questions and use SurveyMonkey. [Heather Tunender and a CIG sub-group developed questions for a librarian survey back in May, 2005. The survey questions are included in the CIG report to HOPS. We could use those as a starting point to develop a new survey.]

* Can we find out what typical call volume numbers are for academic libraries using QuestionPoint? Can QP supply this information or will we need to poll other academic services?

Action item: Adams will ask CIG members for volunteers to form ad hoc committee to define methodology, select sample weeks and review transcripts. Suggested timeline: Call for volunteers by February 23, work through March, report to CIG due by April 16, 2007.

Action item: Furuta will call for volunteers to develop a librarian staff survey using SurveyMonkey or similar software. Suggested timeframe: Target week for survey April 9-13, 2007. Survey results to be included in May 21st HOPS report.

Action item: Adams will query QuestionPoint regarding call volume statistics for comparable institutions. Suggested timeframe: Report to CIG by March 2.

Action item: Adams and Furuta, with CIG input and assistance, will draft a service report to be submitted to HOPS by May 21, 2007 (per HOPS minutes of October 9, 2006).

Our current experience is that the service is being used with librarians routinely handling multiple callers. Several CIG members are interested in querying QuestionPoint about the cost of hiring contract librarians for back up staffing. What are the background, training and qualifications of their contract librarians? Are they regularly assigned to an institution or collaborative or are they part of a pool? Adams will contact QP with these questions. When asked if we were to expand would we prefer to grow to specific hours seven days a week or 24 hours on specific days of the week, the group preferred specific hours across the seven days.

Action item: Adams will contact QuestionPoint for information about supplemental staffing options. Report to CIG by March 2, 2007.

VII. Instant Messaging: Part of the HOPS charge to the CIG in developing the digital reference collaborative was to explore using alternate software, such as Instant Messaging, to provide the service.   UCI conducted a pilot project using IM during summer, 2006. The UCSD Biomedical library reference desk offers IM service - see **http://biomed.ucsd.edu/ask/im.html** for more information. They use GAIM as the IM manager. One of their newer librarians is looking into text messaging for the reference desk.   Will QuestionPoint be adding IM capabilities with users to their service anytime soon? This question may be answered in our request for more information about system enhancements currently under development (see above).
Action item: Davidson, Firestein, and Furuta will explore options for moving service to Instant Messaging platform. Suggested timeframe: Progress report to HOPS by May 21, 2007.

VIII. Wrap up: CIG members found the face to face meeting quite useful and productive. The setting and format allowed for open discussion of issues and sharing of information.

Action item: CIG Co-chairs are urged to recommend that HOPS support at least one annual face to face meeting.

The meeting adjourned at 4:15 p.m.

APPENDIX:

FALL, 2006 SCHEDULE (November 5, 2006 – January 26, 2007)

	SUN	MON	TUES	WED	THUR	FRI
11-12		I	SD	SD	SD	LA
12-1		I	I	SD	I	R
1-2		R	SB	I	R	R
2-3		R	SB	I	LA	I
3-4		SB	LA	SB	LA	I
4-5		SB	LA	SB	LA	I
5-9	LA	LA	SB	M	R	

Campus	Hours	Campus	Hours	Campus	Hours

LA	14	I	9	SD	4
SB	10	R	9	M	4

New schedule starting January 28, 2007 – March 23, 2007

	SUN	MON	TUES	WED	THUR	FRI
11-12		I/ SD	SD	SD	SD	SD
12-1		I	I	SD	I	R
1-2		R	SB	I	R	R
2-3		R	SB	I	LA	I
3-4		SB	LA	SB	LA	I
4-5		SB	LA	SB	LA	I
5-9	LA	LA	SB	M	R	

Campus	Hours	Campus	Hours	Campus	Hours
LA	13	I	9	SD	6
SB	10	R	9	M	4

Schedule to begin April 2, 2007- June 15, 2007

	SUN	MON	TUES	WED	THUR	FRI
11-12		I/ SD	SD	SD	SD	SD
12-1		I	I	SD	I	R
1-2		R	I	I	R	R
2-3		R	I	I	LA	I
3-4		SB	LA	SB	LA	I
4-5		SB	LA	SB	LA	I
5-9	LA	LA	SB	M	R	

Campus	Hours	Campus	Hours	Campus	Hours
LA	13	R	9	SD	6
I	11	SB	8	M	4