

Report to HOPS on
Ask a UC Librarian digital reference service
May 23, 2007

The pilot collaborative chat reference service, Ask a UC Librarian, has been in operation for six months now, having been launched in early November, 2006. As of April 30, 2007 we have answered approximately 2360 questions from students at eight of the ten UC campuses. Ask a UC Librarian is now poised to move from a pilot to a production service. The Digital Reference Common Interest Group (DRCIG) submits this report to review the service and to make recommendations. The report focuses on several broad areas: service status (pilot to production); service schedule; service administration and leadership; service infrastructure (methods and modes of service delivery); and service promotion.

Pilot to Production

The collaborative model allows participating campuses to provide more reference service hours to their campus community than they would be able to sustain as a sole service provider. (Irvine, Los Angeles, Merced, Riverside, San Diego, and Santa Barbara have links to Ask a UC Librarian on their library web pages and provide staff for the service. Davis and Santa Cruz have links to the service but do not provide staff. Berkeley and San Francisco do not provide staff or links to the service for their users.)

- **Recommendation:** The DRCIG recommends that the Ask a UC Librarian service continue as a production service.

Support: Appendix A: Overall Service Statistical Data

- Calls by user status are: 4.5% faculty, over 8% staff, almost 22% graduate students and 50% undergraduates.
- The average number of calls handled per week is rising.
- We have received calls from each campus that has added a link to their library web pages. No calls have been received through Berkeley and San Francisco as they have not added active links to the service.
- The Appendix A worksheet titled Comparisons gives data from current QuestionPoint statistics and from an unnamed (now defunct) academic cooperative (data provided by S. McGlamery of OCLC/QP). Both of these comparisons indicate that our volume is below average. However, both sets of statistics have difficulties and should be used for ballpark measurements only. Additional participation in the Ask a UC Librarian service should increase the call volume. Additionally studies show that promotion of digital reference services consistently increases call volume.
- An internal benchmark for the collaborative is a *before* and *after* comparison of UC libraries with digital reference services. Both ULCA and UCI showed growth in the number of requests in the Winter quarters between 2006 and 2007. UCI grew 21.19% while UCLA's growth was 19.12%. The growth in volume indicates users are increasingly taking

Submitted by Elaine Adams & Ken Furuta, co-chairs DRCIG

advantage of our resources and that the collaborative has not been a step back for them.

Support: Appendix B: Question analysis

- 42% of calls are instructional, ready reference, reference or research in nature.
- 24% of calls concern accessing library resources.

Support: Appendix C: Analysis of user surveys

- We looked at 172 surveys filed between January 10 and April 30, 2007.
- Surveys were filed for all campuses providing service staffing.
- 85% of the surveys involved inter-campus transactions, i.e. the referring campus was not the answering campus. Very few of these survey responses commented on the inter-campus nature of the call. Two indicated they thought they would have been better served by someone from the same campus, and one thought it was “neat to get help from a librarian at a different campus”.
- A few users commented on the slowness of the software, and a couple of others suggested longer service hours.
- Favorite comments: “saved me a tremendous amount of time and frustration”, and “I learned a lot and can now access and find much more articles on my own”.
- Repeat callers may be used as another measure of user satisfaction. According to the QuestionPoint Report of Questions Asked by Patrons (calls within the last 90 days), 7.7% of the users called in a second time, and 3.4% called in three or more times. Looking at the data for calls more than 90 days, 10.5% of users called in a second time and 6% called three or more times.

Support: Appendix D: Ask a UC Librarian staff survey

- 62% of Ask a UC Librarian service providers responded to the survey.
- 84% of responders rated service provided as good or excellent.
- Local information (“Where is room...”) and navigating other campuses library websites were the most challenging questions to answer.
- Survey results regarding technical problems and issues have been shared with Carol Bonnefil of QuestionPoint.

Overall concerns:

- Ask a UC Librarian needs effective leadership to consolidate the gains we have made in establishing the chat collaborative service. A QuestionPoint representative commented to Adams that most collaboration services take three months to launch. UC’s service was launched in about six weeks. However, we have not fully developed some policies and procedures critical to continued service growth, such as service and training guidelines, best practices and regular transcript review procedures.

- We also need effective promotion both on the individual campus level and at the CDL level to continue our visibility to our client pool. In the pilot mode we agreed to let each campus market the service. If we are to continue the service in production mode, we need a system-wide marketing plan. For instance, we need support for links to the service on more than one campus library web page and preferably on high level pages. For more discussion see the section on Promotion later in this report.
- User information needed for remote access of electronic resources (i.e. proxy server, VPN, user accounts and PINS) needs to be more prominently displayed on library web pages. The information is often “hidden” two or more layers down.

Service Schedule: HOPS guidelines dictate that the service be operational when any campus is in session. The CIG recommends that the guideline be amended to acknowledge that campuses providing links to the service on their library web pages will have a preferential voice in the determination of service hours. It is inefficient to staff the Ask a UC Librarian service when the only campus in session does not provide an active link to the service for their users. UC Merced, who is on a semester system, has been an active participant not only in providing active links to the service, but in providing staff hours for the service.

Recommendation: The DRCIG recommends limited summer service hours 11am to 5pm, Monday through Friday from June 18th through September 28th with resumption of evening hours beginning October 1st.

Support: Appendix E: Calendar

- Campuses providing staff for the service have agreed to staff summer school hours starting June 18th rather than June 25th to accommodate UC Merced’s summer school schedule.
- We have also agreed to staff from September 14th to September 28th, when most campuses are in intersession, since UC Merced will already be back in regular session.
- However, given the call volume from UC Merced, we recommend commencing evening and weekend service hours on October 1, 2007 when the rest of the participating campuses are back in regular session.

Administration and Leadership

A production service needs focused, ongoing and sustainable leadership, someone whose primary responsibility is to the UC chat collaborative service. This person would function as a liaison between the campuses and the CIG as well as between the collaborative and our software provider, would help form policy and procedures, and would oversee training, scheduling issues, and data analyses, among other duties.

Recommendation: The DRCIG recommends the appointment of a full time service coordinator whose sole responsibility is the ongoing monitoring,

assessment, and promotion of the chat service in addition to coordination of system-wide staff training and scheduling. With a dedicated Ask a UC Librarian service coordinator in place, the DRCIG can refocus on its original mission and charge.

Support: Appendix F: Draft job description

- Appendix F is a first draft for a new position as the Program Coordinator for the Ask a UC Librarian service. The job duties are based upon postings to the Dig_Ref listserv for similar positions with other collaborative services, e.g. BC Virtual Reference, Q&A New Jersey, and Maryland AskNow!
- Many of these duties, such as scheduling, compiling statistics, and writing service documentation and reports for HOPS are currently being handled by the DRCIG co-chairs in addition to their primary responsibilities. Duties that are not being performed to the level needed by a production service are coordinated system-wide training, regular transcript review for quality, and working with campuses on service promotion.

Concern: If this pilot moves into a production service, it will be unique in the UC system in that it is a statewide collaborative, but not a CDL unit. The Ask a UC Librarian service will need focused leadership to effectively manage the day to day operations and to promote service growth. We have based the recommendation for a full time program coordinator/director on the experience of Adams and Furuta. If a full time position is not an option, a half time position could work with some reduction in duties. Perhaps a part time position could be “filled” by a currently employed librarian with release time from regular duties to take on this project.

Infrastructure: Methods and Modes

QuestionPoint is slow, a complaint from both the librarians providing the service and our callers. All the campuses agree that we would prefer to use a faster IM software solution. However, there is no IM software in use which supports the technical needs of a collaborative service, e.g. multiple simultaneous logons to handle heavy user traffic. A few groups are working on developing prototypes for collaborative IM and we will monitor their progress closely.

Recommendation:

The DRCIG recommends that Ask a UC Librarian not move to an IM platform at this time, but renew with the QuestionPoint software for another year while we actively monitor the environment for an effective, scalable solution.

Support: Appendix G: IM report

- Individual campuses are encouraged to experiment with IM service at the local level.

- The Ask a UC Librarian Program Coordinator will work with collaborative members to coordinate a structured examination of IM service options.

Concern: Another aspect of developing a collaborative IM service is eliciting the support of IT departments within the libraries and the campuses.

Promotion

Increased call volume depends both on continuing promotion at the campus level and also on more aggressive promotion overall. The first step is the implementation of links to the service on the appropriate campus library web pages. Additional promotion methods include library signage, adding the service logo and link to printed library handouts (e.g. library schedules, quick guides, etc.), using campus announcement services in residence halls to post Ask a UC Librarian information.

Recommendation: To assist campus efforts in service promotion, the DRCIG recommends that HOPS provide support for the development by a graphic designer of a central set of customizable templates. (See the ASERL website at <http://www.ask-a-librarian.org/press.cfm> for examples.)

Support:

- A recent post to the national digital reference listserv advocated “making your links as ubiquitous as you can” to increase call volume. The post goes on to recommend a link on every page on your site, preferably in the top right (consistent placement), and through branded links in the catalog, and vendor databases.
- Not all campuses have access to the same level of graphic design expertise and service. Therefore a set of central, yet customizable, templates would help campuses with promotion for the service.

Appendices (see separate files):

- A: Service use statistics (Furuta)
- B: Question analysis statistics (Adams)
- C: User survey analysis (Adams)
- D: Staff survey report (Furuta)
- E: Calendar (Adams & Furuta)
- F: Draft program coordinator job description (Adams)
- G: IM report (Furuta)