

Case studies of collaborative virtual reference services

Prepared for the 2013 Oregon State Library Task Force on Collaborative Reference by
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Introduction

The trend for collaborative virtual reference services in libraries began in the early 2000s, notably with New Jersey's QandANJ in 2001, funded by the New Jersey State Library and operated by a the South Jersey Regional Library Cooperative (SJRLC), a regional multi-type cooperative that supported regional libraries until it was closed in 2010. Answerland was modeled very much after QandANJ, following an identical funding structure and using the same software.

The idea was simple – let librarians enhance to patrons' information searches on the internet in the same way they did to patrons in the library. With all the excitement about the internet, there was a sense that librarians – providing reference service – could make a serious impact and position libraries on the cutting edge of technology and culture. Who better to help the world navigate the morass of uncategorized data emerging on the World Wide Web than professionals skilled in organizing and finding information?

The need to collaborate on virtual reference stemmed from the need to save money on software costs (LSSI, one of the software providers at the time, charged \$3,000 per "seat", or simultaneous login, making it cheaper to share) and the anticipated low volume of initial traffic.

In the next few years, statewide collaborative virtual reference services also sprung up in Alaska, California, Connecticut, Delaware, Florida, Idaho, Illinois, Kansas, Kentucky, Maryland, Massachusetts, Montana, Nevada, North Carolina, Ohio, Oregon, Pennsylvania, Washington and Wisconsin, as well as the province-wide services in Alberta, British Columbia and Ontario in Canada and nation-wide services in Australia, England (n.b.: not the United Kingdom), New Zealand and Sweden. Smaller cooperatives were started in Arizona and New York, among others places.

Each project operated in a slightly different way, depending on the needs of the libraries in the region and the funds available. Often a coordinator for the service was hired, and software was procured for the group.

Below are short case studies of a some of those services. The cases were chosen to demonstrate different models for the funding and delivery of collaborative reference service, including chat services such as Answerland and self-service models.

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Cases

British Columbia (Canada) - AskAway

Source: Sunny Nishimura, British Columbia Electronic Library Network, sunnin@eln.bc.ca

British Columbia's AskAway (<http://www.askaway.org>) service was started as two services with a common brand. One service, coordinated by the Vancouver Public Library, provided collaborative chat service for public libraries, and another, coordinated by the BC Electronic Library Network (BCELN), operated one for academic ("post-secondary") libraries. Each service had its own coordinator or group of coordinators who spent part of their time on working on the service.

When funding from the BC Ministry of Education dried up, the public library collaborative stopped operating. A ministry-funded organization called BCCampus (<http://www.bccampus.ca/>) continued to provide partial funding for the academic AskAway, and academic libraries contributed the remainder of the funding to provide a collaborative service coordinated by BCELN.

Recently, ELN, in service to academic libraries, has been exploring a collaborative online system modeled on the AskAway system for writing tutors to support students in British Columbia's post-secondary education system.

British Columbia's AskAway is not the same as Wisconsin's service of the same name.

Colorado – ASK: AskColorado/AskAcademic

Source: Kris Johnson, AskColorado Johnson_K@cde.state.co.us

The Colorado State Library, a division of the Colorado Department of Education, operates AskColorado/AskAcademic (<http://www.askcolorado.org/>), a cooperative virtual reference service for Colorado students and residents as patrons of its academic library patrons. One full-time and one half-time professional librarian are employed by the Colorado State Library to manage the service. Other State Library employees provide support as necessary, including a server administrator, programmer, and web developers.

The service has two separate queues, AskColorado for public and school library patrons, and AskAcademic for academic library patrons, but AskColorado and AskAcademic are considered one cooperative. The AskColorado public library members are from Colorado libraries only. The AskAcademic member libraries are primarily in Colorado, but in recent years, three academic libraries in Texas became members as well.

Though the Colorado State Library provides funding for the operations manager and assistant, software, and some after-hours staffing through federal LSTA grant monies, libraries are also requested to contribute monetarily in addition to staffing the service. Options are flexible, with most contributing both monetarily and with staffing, and a small number opting for other options. The "Suggested Contribution" schedule is available online at http://www.askacademic.org/contributions_chart.html. ASK Operations Manager Kris Johnson says the service would not be able to operate on contributions from participating libraries alone.

One librarian from each participating library serves as a liaison between her library and the ASK Operations manager as well as serving in an advisory capacity.

Until July 1, 2013, all Colorado residents have access to the service. Recently, the Denver Public Library, the biggest public library in Colorado and biggest contributor to AskColorado, elected to stop participating in the cooperative. In combination with other factors this led, the member libraries to vote unanimously to change the open service model to one available to the customers

of the participating public libraries. The Colorado State Library summarized their decision: "With fewer participating libraries, providing open service to all Colorado residents is no longer possible. A smaller cooperative has resulted in a reduced ability to meet statewide demand for 24/7 live online reference services." AskAcademic has already been successfully operating using the member-only service model for the past four years.

Florida – Ask A Librarian

Sources: Traci Avet and Jessica Riggins, Tampa Bay Library Consortium, avett@tblc.org, rigginsj@tblc.org

The State Library of Florida operates the Florida Electronic Library (<http://www.flelibrary.org/>), a portal to statewide resources, including databases, a Florida-based digital library, resources for kids. In addition, the State Library contracts with the Tampa Bay Library Consortium (TBLC) to coordinate a number of statewide services and resources. One full-time staff member coordinated Ask A Librarian (www.askalibrarian.com), and four additional staff contribute to the program as part of their duties at TBLC.

128 Florida Public, Academic, K-12 and Special libraries provide staffing for the service. Ask A Librarian is not open 24/7, but libraries manage to cover 10am-Midnight daily. In addition to the collaborative service, Ask A Librarian provides local queues for individual libraries, and these have been very successful recently.

The State Library of Florida provides funding through LSTA. There are no "out of pocket" costs for libraries to participate.

North Carolina – NCKnows and NCLive

Source: Phil Blank, Consultant, phil@philblank.net

The State Library of North Carolina uses an individual contractor, Phil Blank, to coordinate NCKnows, a collaborative chat service of North Carolina's libraries. About 150 libraries provide NCKnows. At any given time, 20 to 25 libraries participate in monitoring the general NCKnows queue during the daytime hours and local, individual contractors provide late night service and weekends (except for 12am-8am sat/sun).

The State Library of North Carolina licenses Libraryh3lp for NCKnows but also for all libraries in NC, so any library is able to use Libraryh3lp independently to staff their own patrons.

A committee of librarians and directors from North Carolina's libraries advise the contractor and the State Library of North Carolina regarding the program.

Blank says he has never had a marketing budget, yet the service is successful.

The State Library of North Carolina provides funding through LSTA. There are no "out of pocket" costs for libraries to participate.

NCLive (www.nclive.org) is a portal to statewide databases, audiobooks and North Carolina-related digital libraries. Though staff work closely with the State Library of North Carolina, NCLive is a separate agency. In 2010, staff for the site refocused the experience of the site away from general information and towards "Economic Development and Quality of Life". Jill Robinson-Morris gave a presentation about this at the 2010 Reference Renaissance conference in Denver, Colorado. The site is again now focused on general information, but the career and job information center page (<http://www.nclive.org/browse/discover/jobs>) is an example of this kind of focused portal.

Ohio - KnowItNow

Source: Don Boozer, Cleveland Public Library, don@cpl.org

In 2004, the Cleveland Public Library (CPL), the Cuyahoga County Public Library (CCPL) and the Northern Ohio Library Association (a regional library cooperative, NOLA, was eventually renamed Northeast Ohio Regional Library System, NEO-RLS) submitted a joint proposal to the State Library of Ohio to use LSTA funds for a statewide virtual reference service. CPL was responsible for software, hardware, and technical support; CCPL for marketing; and NOLA for after-hours coverage.

NOLA contracted with up to 70 librarians to provide late-night service and also hired a coordinator/trainer for their AfterDark service. Following a review of KnowItNow24x7 by the Kent State University School of Library and Information Science in 2007, the service was consolidated under Cleveland Public Library and Cuyahoga County Public Library's formal leadership role was also ended; CPL sub-contracted with NEO-RLS (formerly NOLA) to continue to provide after-hours coverage. A "statewide coordinator" position was created at CPL to oversee KnowItNow24x7 and supervise the existing technical/website coordinator position at that institution. Today, two full time staff work on the program at CPL.

KnowItNow24x7 does not have an advisory board but instead depends on the management team at Cleveland Public Library and feedback from the Associate State Librarian for Library Development. A statewide quality-assurance team has also taken on some responsibility as well.

From 2008-2013, L-net partnered with KnowItNow24x7 to modify open-source software to deliver chat reference service. L-net also partnered with NEO-RLS for after-hours service from 2008 to 2012.

In 2012, KnowItNow24x7 stopped providing 24x7 live chat service, instead focusing available resources on the hours with the most demand for the service. Starting in July 2013, KnowItNow24x7 will no longer use NEO-RLS for after-hours service but will use OCLC QuestionPoint in the same way that L-net does today for a return to 24/7 after-hours coverage.

Oregon - Answerland

Source: Caleb Tucker-Raymond, Multnomah County Library, calebt@multco.us

From 1994-2003, the Oregon State Library operated a collaborative reference service, Oregon Reference Link, that allowed small libraries to "escalate" difficult reference questions to one of 5 regional reference centers. Region reference centers were reimbursed \$35,000 annually for this service.

In 2001, the Oregon Library Association's Vision 2010's "Call to Action" called for Oregon Libraries to "Create a collaborative on-line reference service that is available 24 hours a day, 7 days a week." A year later, the Oregon State Library organized an e-Reference task force to recommend how to accomplish the goal. The group decreed that a collaborative reference service should serve patrons directly.

In 2003, Oregon Reference Link was formally ended, and LSTA funds were used for the new program, using Multnomah County Library as a fiscal agent. All of the costs of the program are charged to LSTA.

In 2004, the program was re-branded to "L-net: Oregon Libraries Network" and launched as a 24/7. It is being re-branded again to Answerland in 2013.

Two full-time staff, a coordinator and a partner support librarian operate Answerland, with the direction of an advisory board and the support of permanent committees for quality assurance and planning an annual conference and ad-hoc committees as needed.

From 2008-2013, Multnomah County Library partnered with Cleveland Public Library to develop, support and provide an open-source software platform to deliver and extend collaborative virtual reference service.

In 2013, the Multnomah County Library elected to stop operating the program as of June 30, 2014. The Oregon State Library charged a new task force on collaborative reference to identify the reference and information needs of Oregonians, prioritize those needs, to propose which ones can best be met by Oregon libraries working together. The group will make a recommendation in September 2013.

Washington – AskWA

Source: Matt Roach, Washington State Library, matthew.roach@sos.wa.gov

The Washington State Library started supporting Washington Libraries exploring virtual reference service about the same time that Answerland launched, around 2003. When it started, a coordinator at the Washington State Library worked for one year each on developing training, marketing and evaluation for virtual reference.

Simultaneously, the Washington State Library provided start-up grants for groups of Washington Libraries to purchase software (libraries could choose one of many options on the market at the time) for the purpose of providing collaborative virtual reference service together.

Eventually, Washington's model switched to providing one software option, OCLC QuestionPoint, and supported a half-time coordinator for a statewide service, AskWA (<http://ask.wa.gov/>).

The current plan is for WSL to continue to provide the half-time coordinator position and for the cost of QuestionPoint to gradually shift to Washington Libraries.

Wisconsin – AskAway

Source: Mark Beatty, mbeatty@wils.wisc.edu

From their website, "Wisconsin Library Services (WiLS) is an independent, not-for-profit organization offering services to support libraries and other cultural heritage institutions." WiLS provides services such as interlibrary loan, cooperative database purchasing and continuing education. From 2002-2012, WiLS operated a collaborative virtual reference service for Wisconsin Libraries, expanding to a statewide service in 2005.

One WiLS employee worked to coordinate the service but also had many other duties.

Funding initially for the statewide service was provided by a combination of the member library fees. Starting in 2008 through 2011 LSTA funds provided by the Wisconsin Department of Public Instruction - Division for Libraries and Technology along with some modest member fees supported the consortium. The LSTA funding stopped in 2011. After that time there was an attempt to have member libraries wishing to continue to participate in collaborative virtual reference services by contributing member fees to pay for software and a portion of the WiLS coordinator's time. However after investigating and choosing to use LibraryH3lp software most of the members interested in continuing virtual reference services choose to leave the consortium

and offer local service only. Many of the other members had simply decided to discontinue virtual reference services all together. The collaborative virtual reference service was disbanded.

There were general positive assessments of the virtual reference service from start to end. However too much of the service was provided by too few of the participants. Many of the libraries felt that the service was good but underutilized. Budget constraints on libraries reached a point where the cuts required stopping staff-centric programs such as virtual reference.

Wisconsin's AskAway is not the same as British Columbia's service of the same name.