

LSTA STATEWIDE LEADERSHIP PROJECT PLAN FOR 2003-2004

Collaborative Virtual Reference Pilot Project

1. **PROJECT MANAGER**, Jeanne Crisp, Chief, Library Development Section, State Library of North Carolina
2. **OVERVIEW OF PROJECT** (Summarize the proposed project, including a description of the library users who will benefit.)

This multi-year pilot project will enable staff from public and academic libraries to cooperate in provision of virtual reference service to North Carolinians. The end users will be able to communicate with reference librarians via the Internet in live “chat” sessions. A single web interface will be developed as the starting point, and libraries throughout the state will be encouraged to offer their users a link to the virtual reference service. The virtual reference software to be used, and the organizational model for sharing the work among partner libraries, will be based on efforts already in place throughout the country. The pilot project will accomplish several things:

- train a group of librarians to use the virtual reference software to provide service
- develop a model, mechanism and procedures for libraries to work collaboratively
- provide an opportunity to evaluate whether collaborative provision of virtual reference service is an effective way to meet the information needs of North Carolinians

Background:

In 2001-2002 the State Library funded “the planning phase of a multi-year effort that supports the creation of virtual reference services in public, academic, and special libraries in North Carolina. “ The purpose was to focus “on gaining an understanding of the current level of interest in and knowledge of virtual reference services among the librarians in North Carolina’s libraries, on developing a common and increased knowledge of virtual reference services among the librarians in North Carolina, and on exploring strategies for developing virtual reference services.” A group of fifteen volunteers from public, community college and academic libraries (roster attached) formed a Virtual Reference Advisory Committee to plan for the future of virtual reference in North Carolina. This project is the result of the planning phase.

“Virtual Reference”—which can be anything from web-based forms for submitting a reference question to interactive, online chat sessions with a librarian—has the potential to benefit patrons of North Carolina’s public, academic, and special libraries by allowing them to have access to reference services whenever and wherever they need information. It is also an emerging service that lends itself to collaboration among libraries. Across the nation a variety of models are in place that involve libraries in partnership with other libraries in their region, their state or across the country.

Several activities occurred during the planning phase of the project, from August 2001 through June 2002, to lay a firm foundation for subsequent work:

- North Carolina public and academic libraries were surveyed about their interest in and knowledge of virtual reference services.
- Committee members attended the Virtual Reference National Conference to learn about issues and vendors.
- Service models from other states, as well as potential software vendors, were investigated by the Advisory Committee.

- A statewide videoconference was held to demonstrate virtual reference and to brief interested librarians.
- Information presentations were made to key stakeholder groups in the state.
- A proposal was submitted - and funded - to set up a pilot project using LSTA funding.

Due primarily to staff shortages at the State Library, the pilot project has not moved as quickly as hoped. However, by June 30, 2003, the following progress will be made on key activities in the 2002-2003 project plan:

- Creating a partnership of libraries: In April 2003, public and academic libraries will receive an invitation to become a partner library (their staff will be trained to provide virtual reference service and will share the responsibility of staffing the "virtual reference desk" with the other partner libraries.)
- Acquiring access to the software and related services: following extensive investigation of options and a Request for Information, the decision was made to use software from 24/7 Reference, a California-based company.
- Developing a single starting-point web page: Virtual Reference Advisory Committee members have developed a basic web page.
- Setting up the measuring and evaluation components: A Request for Information was issued in April 2003 to invite proposals on how best to conduct an evaluation of this project.

3. EXPLAIN WHY THE PROJECT IS NEEDED AND LINK THE PROJECT TO THE GOAL(S) AND OBJECTIVE(S) IN NORTH CAROLINA'S LSTA PLAN.

The planning process identified several areas that needed investigation and planning, including definitions, evaluation of software, potential costs, and strategies. The Virtual Reference Advisory Committee gathered enough data to understand the spectrum of virtual reference services, the vendor options and potential costs, and to understand various organizational models that exist across the country. A pilot project was developed, and approved for LSTA funding, to test a collaborative approach to provision of virtual reference service.

Why does the proposed project use a collaborative approach rather than allow for individual libraries to experiment with a variety service delivery methods? The Virtual Reference Advisory Committee suggests the following benefits of proceeding in a collaborative fashion:

1. The virtual reference service will be available to all NC libraries and residents.
2. The most successful models studied from across the country have been collaborative, so that a library can offer service for more hours than its own staff can provide. In addition, we can learn from these models and not reinvent the wheel.
3. Competitive LSTA grants to individual libraries would make it difficult, if not impossible, for small libraries to participate. They often lack the time to prepare an application and then implement a project.
4. A collaborative project will tap the expertise of libraries currently offering virtual reference as well as the enthusiasm of new libraries that are selected to participate as service providers.
5. It will help libraries to capitalize on the shared databases available through NC LIVE and NC WiseOwl.

6. Since there is a growing market for collaborative virtual reference service, the most popular software readily supports collaboration, and it will be relatively easy to implement a collaborative approach.
7. With small individual projects, any sample data gathered would likely be too small to project to a larger population. A larger project provides greater numbers that are more likely to prove statistically significant in assessing the viability of offering collaborative virtual reference services in North Carolina.
8. Collaboration will offer a sharing of training and staffing, which should allow libraries to participate with a modest investment of time.
9. Since the partners will represent different types of libraries, both by type and by size, the project will provide a way to test the feasibility of a statewide model for collaborative virtual reference using a small number of participants.
10. With multiple types of libraries offering this service, a common web starting point can be tested as a way to manage users' needs for different levels of service.

North Carolina libraries want to test a collaborative virtual reference service, and they are asking for leadership from the State Library to coordinate a project that will enable them to work together.

Critical questions will be addressed during the course of the multi-year pilot project, including:

- What is required of a library that wishes to offer virtual reference?
- What is the value added if different types of institutions work together?
- What is the impact on libraries that provide virtual reference service?
- Is virtual reference expandable to the whole state?
- How will this project increase our knowledge of effective organizational models?
- How can the quality of the reference service provided be measured?
- Can staff from different types of libraries provide quality reference service to users from other types of libraries?
- How will the project further greater use of existing resources such as NC LIVE?
- What partnering or leveraging opportunities exist?

This project supports *Library Services and Technology Act: Plan for Implementation in North Carolina, 2003-2007*:

Goal 1: Achieving Equity in Library Service: All North Carolinians will have access to excellent library service without barriers.

4. LIST THE PROJECT OBJECTIVES AND DESCRIBE YOUR PLAN TO EVALUATE THE PROJECT'S SUCCESS IN MEETING THOSE OBJECTIVES.

This is a proposal for the second year of a planned three-year pilot project designed to determine whether or not collaborative virtual reference an effective way to meet the information needs of North Carolinians. There are many issues to be addressed before libraries can decide whether collaboration is the right way to approach virtual reference service in North Carolina. For that reason, the objective for this project year is:

By June 30, 2004, the results of an interim evaluation of the pilot project will be available to help guide the Virtual Reference Advisory Committee in its decisions on whether and how to proceed with the pilot project.

During the grant year 2003-2004 several benchmarks will be tracked. These will help determine whether basic aspects of providing virtual reference service are being implemented successfully. They include:

- staff from participating libraries are trained and are sharing the workload of providing virtual reference service
- libraries are linking to the virtual reference web page
- evaluation of transcripts of patron sessions will demonstrate that users are receiving accurate and thorough responses
- users will indicate satisfaction with the service

An outside evaluator is being recruited to evaluate the pilot project. That person will design and implement the details of the evaluation process.

Eventually we will know the answer to the key question. But even if the answer is "Yes, collaborative virtual reference is an effective way to meet the information needs of North Carolinians," the ultimate measure of success will be whether libraries are willing to sustain a collaborative effort once grant funding ends.

5. OUTLINE THE ACTION PLAN FOR THE PROJECT, INCLUDING KEY ACTIVITIES AND THE TIMELINE.

Pre-grant activities:

In May and June 2003, the Virtual Reference Advisory Committee will be involved with selecting partner libraries and with working with the vendor to set up profiles for North Carolina libraries and to establish the starting web page. The service must also be named, and some initial graphic identity established.

Date	Activity	Who
July 2003	Train staff from 8-12 libraries to use software and develop policies and procedures	Vendor; Virt Ref Advis Comm
August 2003	"Quiet" launch of service, initially offered 60 hours a week	Partner libraries
August 2003	Contract with outside evaluator to help determine hypotheses and establish data collection from onset of service	State Library
September 2003	Hire contract NC librarian to supplement pool of trained librarians	Virt Ref Advis Comm, State Library
September 2003	Public launch of virtual reference service to coincide with school year	Virt Ref Advis Comm, Partner libraries; State Library
September 2003	Contract with 24/7 to provide "off hours" coverage	State Library
October 2003 - June 2004	Monitor transcripts for quality control; collect and analyze usage statistics	Virt Ref Advis Comm; Evaluator
October 2003 - February 2004	Encourage libraries to link to virtual reference service	Virt Ref Advis Comm, State Library

March 2004	Interim report describing usage, quality, satisfaction, and impact on libraries providing service	Evaluator
March 2004 - May 2004	Virtual Reference Advisory Committee evaluates progress to date, makes decisions on future directions of project	Virt Ref Advis Comm, State Library, LSTA Advisory Committee

Notes:

The vendor selected for the project is “24/7”, a non-profit consortial virtual reference service that originated in southern California. (The underlying software is the same as that used by LSSI, which is already in use in three North Carolina libraries)

The initial target of 60 hours a week is based on experience from Virtual Reference Advisory Committee members who offer virtual reference service today. We will cover daytime, early evening and weekend afternoon slots. Additional hours could be added based on the number of libraries that participate.

In order to ensure 24 hours a day, seven days a week of service, we will initially buy coverage from 24/7 as needed. However, once the North Carolina librarians are comfortable with the virtual reference process and the workload, we expect to become a member of a global consortium operated by 24/7. Membership in this global consortium will call for some additional hours of coverage provided by North Carolina librarians. In exchange, we will be able to offer, at no additional charge to the project or any member libraries, free virtual reference coverage for North Carolina citizens.

With the guidance of an outside evaluator, the Virtual Reference Advisory Committee and project libraries will monitor all aspects of providing this service, and will document processes and results. A variety of statistics will be collected about all aspects of the service. The evaluator will be asked to help design the collection of statistics (before service begins), to ensure that the right data is being captured, to help the Virtual Reference Advisory Committee to understand and use the data in decision-making, and to write an interim progress report on the new virtual reference service to guide the Virtual Reference Advisory Committee in planning for 2004-2005.

State Library staff will have responsibility for the software procurement process and for hiring an evaluator. They will make all arrangements for meetings of the Virtual Reference Advisory Committee and partner library training and meetings, and they will manage all contracts and temporary staff related to this project.

6. IDENTIFY THE LIBRARIES OR OTHER ORGANIZATIONS THAT WILL BE PARTNERS IN THE PROJECT.

Current Virtual Reference Providers

Six libraries in the state already offer virtual reference service to their users: University of North Carolina-Chapel Hill, University of North Carolina-Greensboro, Duke University, North Carolina State University, The Public Library of Charlotte & Mecklenburg County [PLCMC], and Greensboro Public Library. Each of these libraries is represented on the Virtual Reference Advisory Committee. (The High Point Public Library will launch a virtual

reference service as part of their 2002-2003 Powerful Partners grant. A representative of that project will be invited to join the Advisory Committee.)

Three or four of these libraries are expected to become partners, which will mean that staff from those libraries will share in provision of virtual reference service through our statewide virtual reference page.

Partner libraries

Academic and public libraries will be invited to apply to be part of the project. The Virtual Reference Advisory Committee will use the criteria below to select a representative set of libraries. Staff from those libraries will receive training and will then share the workload of providing virtual reference services.

Criteria for selecting the initial partner libraries will include:

- Benefit of participation to the library's users and staff
- Staff interest, commitment, and reference experience
- Requisite hardware is largely already in place, along with local technical support (Note: the project budget includes funds for computers to help participating libraries that may need to upgrade their hardware.)
- Representative balance between libraries of different types, sizes and geographic locations

Virtual Reference Advisory Committee –

see <http://statelibrary.dcr.state.nc.us/vref/members.html> for current member