

Syracuse University Library

Web Chat Action Team
Final Report
and
Recommendations

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Executive Summary

This is the final report of the Web Chat Action Team, which was formed in the summer of 2001 to fulfill the goal of extending reference service through innovative service delivery using interactive chat. The Team was asked to develop a pilot chat reference service and “to assess the need for, response to, and effectiveness of the service” (Web Chat Action Plan Proposal) and to assess policies and procedures, software selection, and patron and staff responses.

The chat pilot ends December 31, 2002. The Team’s recommendations regarding continuation of the service are outlined in detail in the enclosed report. A summary of the recommendations follows:

- The Team recommends that the chat reference pilot transition to an ongoing program, with yearly evaluation of volume of use, staffing, cost, and software choice, contingent upon the selection of a new chat vendor, staffing reconsiderations, and the designation of a program coordinator for the service with appropriate authority for staffing and implementation.
- The Team recommends use of a free product, InstantService. This service meets all the criteria originally established by the Team, with the exception of offering co-browsing. The Team suggests that QuestionPoint (an LC/OCLC collaborative reference service) chat development be monitored for future consideration, especially in light of our current contract with their collaborative service.
- The Team recommends expanding chat service to other departments within the Research and Information Services Division and evaluating volume, staffing, and user response, on an annual basis. If this expansion does not occur, the Team recommends reducing the number of reference staff involved within the reference department and shortening hours of service.
- The Team recommends designating a staff person to work with the designated project coordinator (described above) to schedule shifts for all participating staff.
- The Team recommends that policies related to chat be reviewed on a regular basis in the context of larger library policies.
- The Team suggests continued publicity and promotion of chat reference service and increased collaboration with other library services and offices on campus.

Interim Period

Syracuse University Library’s contract with 24/7 Reference ends on December 31, 2002. The Team is aware that shifting to a new vendor will require time to negotiate and sign a new contract, to update web pages, to revise the training/policy manual, and to train staff. The Team

recommends that during the interim period, a new web page replace the current chat pages, announcing that the pilot has ended and asking patrons for additional comments.

The Team suggests that consideration be given to designating a digital reference librarian who can coordinate digital reference services library-wide and follow the development of collaborative digital reference opportunities.

The full report follows, including detail about the above recommendations and reports on activities not covered in reports previously filed.

Introduction

Overview of Charge

The Web Chat Action Team was charged with developing and staffing a pilot chat reference service within the Reference Department. The purpose of the pilot was “to assess the need for, response to, and effectiveness of the service.” Chat was to be “an added service for those patrons who need immediate assistance but are unable or unwilling to come to the Library, to call us via the telephone, or to wait for e-mail assistance” (Web Chat Action Plan Proposal).

Background Information

The Reference Outreach Working Group, which worked during the spring and summer of 2000, researched ways to increase outreach to students, especially those who do not come into the Library for reference services. Two types of paths were considered: technological (relying on new and emerging technologies and creative use of technology) and non-technological (relying on human and more traditional library resources).

At the same time, the Library’s Strategic Planning Steering Committee was developing a five-year strategic plan for the Library, which included the following goal and success indicator (Section 2.2):

Goal: Develop a highly user-centered culture that guides the actions of Library staff and informs all Library policies, procedures, and decisions.

Success indicator: Initiate innovative reference service delivery, e.g., Netmeeting, webcams, tele-reference, instant messenger, chat software

In the summer of 2001, the Web Chat Action Team was formed to fulfill the goal of extending reference service through interactive chat. Elaine Coppola was awarded an internal grant of \$5000 to fund a pilot within the Reference Department.

The Team’s work during the fall of 2001 and spring of 2002 is briefly summarized in the following section; the progress reports for these periods are appended at the end of this document (Appendices 2 and 3).

Initial Phases

In our first report, dated November 12, 2001, the Team recommended two products as candidates for use in the pilot. The report describes how the Team researched and evaluated products against a set of criteria and made preliminary decisions regarding staffing roles. The full report is included as Appendix 2.

Once a determination was made that the Library would be using 24/7 Reference, the Team took the necessary steps to implement the pilot service. During this phase, the Team focused on training, hardware, policies and procedures, a survey form for users, staff communication, and promotional activities. The May 10, 2002 Action Plan Progress Report describes the implementation in detail.

In addition, this report gave a preliminary analysis, as required by the terms of the Action Plan Proposal, describing barriers to progress that we had encountered (Appendix 3). The foremost barrier was the minimal publicity authorized for the pilot prior to the rollout in March and delay of adequate promotional support until the fall. Ongoing publicity efforts had been diminished by the amount of funding made available for advertisements and other promotional activities. Low use of the service due to delayed publicity made evaluation difficult.

Final Phase

This final report covers activities undertaken between May and December 2002 and addresses the evaluative phase of the Team's charges as stated in the original Action Plan Proposal (Appendix 1):

- The purpose of the pilot will be to assess both the need for and response to the service.
- The pilot will be a time to assess the effectiveness of policies and procedures.
- Assessment will include follow-up discussions with patrons using the service as well as observations from staff providing the service.
- Success will be measured through an assessment of the costs/benefits of the service (e.g., software costs, staff time, number of requests, patron satisfaction).

Training/Documentation Activities

- Offered opportunities to practice chat skills during regularly scheduled chat shifts;
- Revised and redistributed chat scripts;
- Trained staff in new version of the software;
- Offered weekly drop-in sessions for assistance;
- Rewrote the manual to support the new version of the software.

Promotional Activities

- Created new Reference Services Library instruction bulletin paralleling the new web pages;
- Developed (with Sarah Kline Morgan) advertisements and press releases for campus newspapers, *The Record* and *Daily Orange*;
- Evaluated promotional products and presented suggestions for purchase to the Head of Instructional Programs;
- Placed free standing signs at all public service points at E.S. Bird Library and the four branches of the Science and Technology Library;
- Worked with the Office of Residence Life to hang posters in all residence halls;
- Worked with CMS (Computing and Media Services) to hang posters in all computer clusters;
- Staffed:
 - Graduate Student Information Fair table on Quad;
 - Teaching Assistant Information Fair on the Quad;
 - Resident Assistant Information Fair on the Quad;
 - Student Involvement Fair on the Quad;
 - Works in Progress area at Teaching Tools 2002;
- Placed table tents in Schine and Goldstein dining halls;

- Created a PowerPoint kiosk presentation for use at Library outreach sessions;
- Conducted LibChat demos in Schine Atrium;
- Chalked the Quad at the beginning of the fall semester.

Evaluative Activities

During this final phase of the pilot, the Team:

- Surveyed staff who participated in the pilot;
- Reviewed user surveys;
- Compiled use statistics;
- Reviewed three chat software products;
- Prepared the final report and recommendations that follow.

Recommendations

Charge A.

The purpose of the pilot will be to assess both the need for and response to the service.

Recommendation

Looking solely at the cost of this service, it is clear that this program should not continue in its current incarnation. However, contingent upon the selection of a new chat vendor and staffing reconsiderations, the Team recommends that the chat reference pilot transition to an ongoing program, with yearly evaluation of volume of use, staffing, cost, and software choice. The Team also recommends the designation of a program coordinator for the service with appropriate authority for staffing and implementation to ensure a successful program.

Justification

The Team bases this recommendation on identified service needs as determined by the Reference Outreach Working Group, consistently favorable user feedback, fulfilling initiatives set forth in the Library's Strategic Plan (Section 2.2) and steadily increasing usage. Like e-mail reference, the Team expects chat reference to continue to grow as long as adequate support is given within the context of a library-wide promotional plan. Our statistics illustrate that usage increased significantly as a result of promotional activities.

This method of delivery serves a particular niche of the user population as is the case with other reference and library services. User Surveys submitted to date have been overwhelmingly positive. In keeping with the Library's overall mission and vision, cost should not be the determining factor in providing these services; however the Team has given consideration to reasonable cost in making these recommendations.

Total number of sessions: 156

Sessions by month:

March	April	May	June	July	August	September	October	November	December
6	15	9	9	3	14	28	39	28	5

In addition, staff buy-in is essential to the success of the chat service. Staff have provided sharp insight and suggestions for improvements throughout the pilot. Positive staff feedback helped to inform the Team recommendation that we continue the service.

Charge B.

In addition, the pilot will be a time to assess the effectiveness of policies and procedures.

Recommendation

The Team recommends that a project coordinator be designated to manage the ongoing program. The coordinator would have responsibility for working with the vendor,

updating web pages, informing staff of changes, staff training, and continuing to update chat policies and the online manual (<http://libwww.syr.edu/information/reference/chat.html>).

The Team also recommends that policies related to chat be reviewed on a regular basis in the context of larger library policies, such as:

- Privacy: the Team prepared a privacy statement, which should be reviewed in coordination with other library-wide privacy statements.
- Record deletion: Chat records should be stripped of identifying information at our end, as well as at the vendor's end on a regular basis. These cycles would probably be best matched with cycles of record deletion for other online library services, such as e-mail reference (libref and selector).
- ADA (Americans with Disabilities Act) compliancy: The Team did not test 24/7 Reference chat software for ADA compliancy. The Team recommends ensuring compliancy in accord with other Library policies in the future.

Justification

In order for the service to continue effectively, it is essential that it receive the continuous attention currently being provided by the Action Team, including:

- Making necessary policy, manual and training revisions as software changes;
- Communicating with the vendor;
- Monitoring software problems;
- Monitoring use patterns and adjusting staffing accordingly;
- Gathering statistics;
- Continuing promotional and outreach efforts;
- Ensuring that policies are consistent and integrated with library-wide policies, practices and services.

Recommendation

The Team recommends designating a staff person to work with the project coordinator to schedule shifts for all participating staff, coordinated with desk schedules from their home departments. Preparing the schedule for chat coverage has been the responsibility of the Reference Office Supervisor. Following the instruction program model, the Team identifies the Reference Office Assistant as one possible scheduling assistant.

Justification

Schedule creation is a time-intensive activity. Each semester a calendar for shift coverage will need to be prepared and updated as shift trades, illness, vacation, professional leave, and holidays occur.

Charge C.

Assessment will include follow-up discussions with patrons using the service as well as
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observations from staff providing the service. Success will be measured through an assessment of the costs/benefits of the service (e.g., software costs, staff time, number of requests, patron satisfaction).

1) Software costs

Recommendation

The Web Chat Action Team recommends not renewing our contract with 24/7 Reference.

Justification

The Team was dissatisfied with the software for the following reasons:

- Evaluation of error reports submitted by staff illustrated that staff frequently experienced technical problems (Appendix 8). The Team, working with 24/7 Reference, was unable to determine definitively whether the cause of the problems resulted from our network infrastructure and/or hardware or inherent chat software instability. We did check with another campus entity using 24/7 Reference and learned that they did not experience the same problems.
 - The software required more extensive training than anticipated.
 - The annual renewal fee for use of 24/7 Reference is \$3600. The low volume of use does not justify this expenditure.
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Recommendation

The Team recommends transitioning to the free product, InstantService, which includes all of the features we desire with the exception of co-browsing. The Team suggests that QuestionPoint (an LC/OCLC collaborative reference service) chat development be monitored for future consideration, especially in light of our current contract with their collaborative service.

Justification

During the software review phase, the team established criteria for evaluating and comparing products and selected a product accordingly (Appendix 2). Based on our experience during the pilot and given cost considerations, we recommend moving to a software product that doesn't have costly co-browsing functionality.

The Team acknowledges that co-browsing adds an important instructional component to the reference process. We may wish to re-incorporate this feature in the future when co-browsing software offers greater stability and compatibility with our technical configuration. Page pushing may fill the role of co-browsing in the interim.

A matrix comparing three alternate products (i.e., InstantService, LivePerson (formerly HumanClick) and QuestionPoint Basic) is attached as Appendix 9.

2) Staff time

Preferred Recommendation

The Team recommends expanding this service to other departments within the Research and Information Services Division and evaluating volume, staffing, and user response, on an annual basis.

Justification

During the chat pilot, sixteen staff members from the Reference Department and the Web Chat Action Team staffed the service, on average, thirty-eight hours per week. The Reference Department Temporary Librarian Trainee covered at least eight of these hours each week, including the Sunday evening hours. This position will cease in May 2003.

Users have indicated a desire for more hours of service (particularly in the evening) and extending coverage beyond the Reference Department might be a solution. Although increasing participation would require a change in training (an inter-departmental training model, as opposed to an intra-departmental model), the Team suggests that involving representatives from other departments would:

- Share coverage of hours and allow for increased numbers of hours to be offered;
 - Increase awareness of the service through greater integration in library-wide instruction and reference service;
 - Allow for increased access to subject specialists.
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Alternative Recommendation

If the program continues only within the Reference Department, then the Team recommends:

- Evaluating volume, user response, and staffing on an annual basis;
- Setting the number of hours of coverage based on a combination of peak times of use (as determined by pilot) and staff availability;
- Limiting staffing to librarians, with involvement of other staff at the discretion of the current project manager/to-be-named project coordinator. Participation could be based on extent of involvement in other projects and services, expressed interest, and demonstrated expertise.

Justification

- Training for a smaller number of staff would be more cost- and time-effective;
- The number of hours currently covered by the Temporary Librarian Trainee is of some concern. When this position becomes vacant, it will be impossible to provide coverage for all of the existing hours with remaining staff.
- This model would more closely match the model of other digital reference services currently offered at Syracuse University Library, such as e-mail reference and QuestionPoint, which are not staffed by all department members.

3). Number of requests

Recommendation

The Team suggests continued publicity and promotion of chat reference service and increased collaboration with other library services and offices on campus. Suggestions include MyLibrary, the OPAC (Online Public Access Catalog), integration with the library's instructional program, as well as BlackBoard courseware, the Writing Center, DIPA (Department of International Programs Abroad), Project Advance, and ISDP (Independent Study Degree Program).

Justification

The Team prepared an extensive promotion plan and implemented approved portions during the fall of 2002; some aspects of the promotion were deferred in anticipation of a comprehensive public services promotional effort. Such an undertaking, plus exploration of additional campus collaboration and educational uses, will likely increase the exposure to and use of chat reference. Usage statistics increased considerably in the fall semester as a result of promotional activities. Between March and August, there were 56 sessions. Between September and December, there were 100 sessions.

4). Patron satisfaction

Recommendation

The Team recommends continued review of users' responses to the service through surveys and other means. In addition, the Team suggests that gathering information about users' need for, and responses to, chat be included in ongoing public service efforts, including the User Services Assessment Program Development Action Plan.

Justification

User input is essential to all services and may drive future decisions about the ongoing program. Surveys submitted to date have been overwhelmingly positive (Appendix 5).

Interim Period

Syracuse University Library's contract with 24/7 Reference ends on December 31, 2002. The Team is aware that shifting to a new vendor will require time to negotiate and sign a new contract, to update web pages, to revise the training/policy manual, and to train staff.

Recommendation

The Team recommends that during the interim period, a new web page replace the current chat pages, announcing that the pilot has ended and asking patrons for additional comments. A sample of this web page appears as Appendix 10.

Justification

This page will inform users about the change and allow the new service to be put in place during the interim.

Additional Recommendations

Digital Reference Services

Recommendation

The Team suggests that consideration be given to designating a digital reference librarian who would coordinate digital reference services library-wide.

Justification

At the moment, the Reference Department offers e-mail reference, chat reference and participates in QuestionPoint as well as providing service at the reference desk, by telephone, and through individual consultations.

As noted in the policy section, issues such as privacy and record retention are related to all digital reference services offered by Syracuse University Library. In addition, digital reference is in a period of transformation; software options are changing frequently, standards are being created (such as NISO's (National Information Standards Organization) Question/Answer Transaction Protocol (QATP)), and additional features (such as Voice Over IP) are being explored.

A reference librarian with responsibility for overseeing digital reference (i.e., email, chat, and QuestionPoint) would coordinate library-wide policy, procedure, training, and statistics gathering for all forms of digital reference. The librarian would also monitor digital reference trends and serve as liaison with external vendors. Although the librarian would be involved in the staffing of digital reference, a distributed staffing model would be in place; in other words, the digital reference librarian would not be responsible for answering all e-mail reference questions or covering all chat reference shifts. Their primary role would be that of coordinator in the same way that the Head of Instructional Programs coordinates library instruction but does not teach every session.

Reports/Statistics

Recommendation

The Team recommends using reporting and statistical features in chat software, as well as in the QuestionPoint software, to track users by category (students, faculty, staff, non-affiliated), and time and date of use. In addition, similar information from e-mail reference services should be gathered and evaluated.

Justification

Gathering this information could help guide Syracuse University Library as it plans for digital reference services. For example, extensive use of a service at a particular time of day or day of week could guide staffing patterns. Similarly, exploring whether a particular service is used more heavily by faculty, students, or staff could inform selectors in their liaison roles and identify promotional focus. Taking advantage of

automatic reporting will also provide information about time per transaction, which could help determine staffing per shift.

Collaboration

Recommendation

The Team recommends that Syracuse University Library explore collaborative digital reference options, weighing costs and benefits. An example of collaborative digital reference is the partnership between Cornell University and the University of Washington. Training, licensing and policy issues would need to be carefully considered, as well as policies regarding service to non-SU affiliated users.

Justification

Collaborative efforts provide the opportunity for shared coverage, extended hours, and expanded expertise. They also require responding to the questions of users at participating sites, which is not part of our current practice. The value of such participation and reports from such collaborative projects elsewhere would need to be examined on an on-going basis.

Appendices

1. Action Plan Proposal
2. Product Selection Report - Nov. 12, 2001
3. Action Plan Progress Report – May 10, 2002
4. Promotion Plan Detailed Report – June 7, 2002
5. Summary of user survey responses
6. Summary of staff responses
7. Usage Statistics by month and by day of week
8. Summary of error reports
9. Product Matrix
10. Sample of the interim web pages

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