A Checklist for Starting and Operating a Digital Reference Desk

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SUMMARY. This article explores digital reference and offers practical advice to those interested in implementing a digital reference desk in their library. Digital/chat/online reference services are defined and practical guidelines on staffing, selecting and troubleshooting hardware and software, training, and marketing are offered for those establishing such a service. *[Article copies available for a fee from The Haworth Document Delivery Service: 1-800-HAWORTH. E-mail address: <docdelivery@haworthpress. com> Website: <http://www.HaworthPress.com> © 2002/2003 by The Haworth Press, Inc. All rights reserved.]*

KEYWORDS. Online reference, chat reference, digital reference, practical tips, guidelines

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*Reference librarians who are not in denial know that doing busi-
ness as usual isn't working the way it used to.*

–Serving the Remote User:
Reference Service in the Digital Environment
Anne G. Lipow from Strategies for the Next Millennium Proceedings
of the Ninth Australasian Information Online & On Disc Conference
and Exhibition, Sydney Convention and Exhibition Centre,
Sydney, Australia 19-21 January 1999

INTRODUCTION

Digital. Chat. Online reference. All phrases that have become more
prevalent in librarianship in recent years. What is digital reference?
How is it different from e-mail reference or virtual reference? Why are
all these articles being written about it and is it something I want to do at
my library? The purpose of this article is to explore digital reference and
offer practical advice to those interested in operating a digital reference
desk in their library.

DEFINING DIGITAL REFERENCE

For the purposes of this article, digital reference refers to the act of
providing reference service via the web in real-time. Screen sharing,
co-browsing, queuing patrons, canned answers and tracking software are
features available in many of the software packages in today's market.
While this method of delivering reference service is new to libraries, the
format is very familiar to those who have been on the web for several
years. Chatting or instant messaging are services that are provided by
most Internet Service Providers. Text messaging is even available to
those who have a cell phone. Digital reference is similar, extending the
technology used in chatting with friends to the reference transaction, as a
way of reaching users who are using library resources remotely. They
may not be able to come to the reference desk to ask a question, but they
often want a quicker response than one they might get via e-mail.

WHY DIGITAL REFERENCE?

Users have embraced the web and routinely turn to the Internet to
find answers to their questions. Libraries have responded by placing da-

tabases, tutorials, catalogs and other tools on the web as a way to keep current resources available to users for their research needs. Libraries have FAQs, tutorials and pages where users can submit their questions via e-mail. While these services satisfy many user questions, none of them can provide immediate assistance at point of need.

With more tools available on the web, users are responding by accessing the library from their homes, offices, labs or other places besides the physical library. Librarians have created a structure for doing good research without having to come to the library. However, finding effective ways to reach remote users has been more difficult. Users expect immediacy and want to be able to get assistance at point of need, regardless of location. Moreover, many students have essentially grown up with instant messaging systems and are comfortable and facile with quick Internet communication.

Digital Reference is one of the solutions to raised user expectations. It makes assistance available to the users at point of need in an easy and convenient manner. Librarians are available when users have questions. Users don't have to leave their computer to get the help they need, regardless their location or time of day. Also, in a step beyond what can be done in a simple e-mail or phone call, many of the digital reference services allow the librarian to co-browse (your computers are in sync and you can take them to specific web sites); enabling the librarian to show the user how to search a database and not just describe it to them or point them to it.

Digital reference is also a boon to distance education students. More and more students are taking advantage of online or distance classes. Many times they are located hours away from the institution making it difficult to get to the library to use the collection. Digital reference programs give these students access to services usually available only to students who are able to come to the library.

LITERATURE REVIEW

The topic of digital reference services is very popular right now and there have been several articles written in various library journals. In the February 2003 issue of *D-Lib Magazine*, the entire issue is devoted to digital reference. This magazine is available online and the address is available in the bibliography at the end of this article.

THE TEAM

Setting up a digital reference services takes time and research. A successful launch requires a person or people to fill three critical roles:

1. *Manager/Coordinator:* There needs to be at least one person to shepherd the project from start to finish. They will be the cheerleader, scheduler, troubleshooter, and salesperson. In some libraries, depending on the size, this may end up being a small group, but this person(s) is important since they need to sell the service to the staff and patrons.
2. *Technical support:* The team should include someone who has technical skills and can help set up the service. They need to have rights and privileges (if necessary) to the library's server in order to get the program running properly. They are also essential in case there are technical difficulties requiring contact with the vendor's technical support staff.
3. *Web support:* Another important team member is the web person. Placing the links in the proper places, making sure that they work and designing the web pages and icons to make the project visible and successful is critical.

GETTING STAFF ON BOARD

Usually the initiative for a digital reference service comes from one person or a small group of enthusiastic staff. In order for the new service to get launched and continue as a viable service, there are two groups within the library that have to be sold on the idea: library administration and public services staff.

New services cost money and starting one means there will be both initial costs and ongoing costs that should be mapped out when talking to administration. Costs will vary depending on the program that the library decides to purchase (or subscribe to). Even when programs are available for free, there will be costs associated in staff time to load onto the library's server, training staff, publicity, etc. Other programs have one time set up costs in addition to ongoing monthly fees and these will vary depending on the number of seats you want. (A seat typically refers to the number of librarians who are online at a specific time to answer questions.)

In addition to the program costs other costs to keep in mind include:

- The cost of any necessary upgrades for the computers of those who will be offering the service.
- Money for publicity and marketing. It is not enough to place the service on the library's web page and hope users will find it. Marketing costs money, and while a press release in the local newspaper or library newsletter may help reach some users, the library will need to explore ways to let everyone know about this new service.

One way to keep these costs under control would be to join a consortium. There are several consortia of varying sizes and types around the country. If your library decides to pursue a consortium related program, be aware that most of these consortia choose specific digital reference programs which your library would be required to use in order to participate. There are advantages in joining a larger network of libraries: sharing costs, having more staff available to work during the hours the service is offered, making the service available more hours per day, name recognition and a support group. Drawbacks may include: having to learn library policies for other libraries in the group, no access to a database used by another library, assisting users who may not be in your area (this would depend on the size of the consortium; some are international), and the hours your library is assigned to cover may not be convenient (e.g., weekends or late evenings).

Once the go ahead has been given from library administration to explore the idea of a digital reference service, the next group to "sell" on the project will be the library's public service staff. Staff who already feel they have busy schedules may be reluctant to add yet another service. Questions they may ask include: Where do we do this? At the reference desk? If I have a patron standing in front of me and one online, who gets served first? If I am working away from the desk, is this in addition to the hours I already spend at the desk working with the public or does this replace those hours? How will this additional workload be shared? Can someone who is a part-time assistant do this? What hours is this going to be offered? Can I do this from home?

Staff may also fear transcripts. Since the reference transaction is written down, staff may worry that the record may be used against them during a performance review or that their transaction may be used as an example to others as a "bad transaction." Set guidelines for use of transcripts ahead of time. Early in the process you can strip off identifying information and use them as training tools; later you may decide to in-

corporate them as part of evaluation or training process. Guidelines should be written down so that staff will not be surprised.

The questions can go on from there and it will be important not just to have answers available but also be willing to discuss solutions to increase the level of interest and availability of staff to work on this new service. This would be the point to start developing policies to help define the service. Using current library polices as a foundation, the policies for the digital reference service should reflect existing policies.

SELECTING THE RIGHT SOFTWARE

As is frequently the case in library settings, choice of software often is determined by factors unrelated to the ultimate purpose of the software. Some questions to ask include

1. Does the parent organization support the software? Are you a Linux shop? Use Microsoft products only? Would the chat software you choose run in your environment? Happily, many are Internet-based and so this is less of a concern.
2. Are you required, due to site licenses, purchasing department constraints, or previous contracts, to limit your choices? You should understand what those would be.
3. What will you have to do locally? Will you install the software on a local server? Who will support it? Or will you run the software on the vendor's system? Do you have local technical support to help you, even if you don't host the software locally? You may find, for example, Java or cookie issues. If you don't understand those potential problems, do you have someone you can call on who does?
4. Can you afford the software? Many have pricing based on the number of 'seats' or concurrent librarian users and, based on your experience with other software in use in your library, you will need to determine the pricing and support costs.
5. Do you have the right computers? If you use Macintoshes or Unix machines, be sure the software is usable for you.
6. Does the software conflict with other software packages you use? Will you have to close down or remove software in order to make the chat reference software work? One of the potential benefits of chat software is that you can carry on other work while you're waiting for patrons. If you can't open the software you want, is this ok?

7. Do your library resources (catalogs, databases) work with the software? If you license the chat software to use on the vendor's machine, then that machine may control what you can access. For example, if access to your databases is IP-controlled, you will have to work with the database vendors so that the vendor's machine IP is included in your access.
8. How good is your online reference staff at computer trouble-shooting? Are they comfortable with checking Internet settings? Modifying them? Are they savvy enough to distinguish between an online patron who disconnects because they've had their question answered vs. one who has just gotten lost out there vs. one who is frustrated with the inevitable time delay between questions and answers vs. one whose own settings preclude a solid connection?
9. How comfortable is your online reference staff with typing, to put it plainly? Are they comfortable enough with the keyboard to be able to respond reasonably quickly and legibly to the patrons?
10. What about licensing issues? Do you have resources licensed for use on library machines only?
11. How do patrons typically connect? Slower dialup connections will mean problems with image-heavy web pages, PDF files, etc.
12. How is the information presented to end-users? Will they get confused trying to figure out which services are 'live chat,' which ones require an e-mail and which have web forms that need to be filled out? Clear web pages help a lot here.

WHO SHOULD STAFF THE DIGITAL REFERENCE DESK?

Who staffs the digital reference desk will be one of the first questions a library will need to answer. If the library is large enough, there may be enough staff interested in the service to staff during the hours that the desk is opened. In other libraries it may become part of the job description for all public service staff. When identifying staff to work, it is important to make sure that the staff are comfortable with the electronic databases and other electronic tools used by reference staff. Some libraries have designed digital reference web pages with all the resources grouped together to help the staff person find an answer in a timely manner. Training will be key to easing some of the fears that staff may have and will be discussed later in the article.

LOCATION

Location, location, location. Just like in real estate, location of the digital reference desk is key to its success. Not just the placement of the staff workstation, but also the placement of the service on the library's web page.

In deciding the placement of the workstation for the digital reference librarian, there has been a debate between placing it at the reference desk versus placing the workstation in a separate area. Generally speaking, most libraries have placed the workstation in a separate area. This allows the librarian's attention to be focused on one task and not be placed in a position of being asked to assist someone in person and having to leave them to answer a digital reference question (and vice versa).

Most digital reference software can be set up to work on an individual's computer workstation, allowing the librarian to work comfortably at their desk during their shift. This allows them to get other work done and when a question comes in they then can devote their full attention to working with the patron. Some libraries compromise and have the librarian also take on responsibility for answering the phone or e-mail questions during their digital reference shift. However, it appears to be the general consensus to place the workstation away from the activity of the general reference desk area.

The second key location is the placement of digital reference on the library's home page. Since many requests for assistance come at point of need, it will be necessary to place icons liberally around the website, to remind users about the service. Some libraries have icons placed on database portals and others use pop-up windows asking the patron if they need assistance. If the library is not able to run the service 24/7 it will also be important to include links to other services (e-mail, telephone, reference service hours, consultations, etc.) during the hours the service is not in operation so that patrons are not frustrated with the lack of available assistance.

HOURS OF OPERATION

The big advantage to digital reference services is that the library becomes more than a virtual collection but rather a digital public service. The next question to consider when designing the digital reference service then is; when should the service be offered?

What patrons like about digital reference is its availability at point of need, regardless of time. This is a dilemma for many libraries since that time may be at 11 p.m. at night after they have either shut down reference service or closed the building. How do you staff a service that ideally should be available 24 hours a day 7 days a week? Is this realistic? The answer is that not many libraries can afford to operate this type of service 24/7 and thus must decide what hours it can be available to patrons of their library. The hours may vary depending on your patrons and should be well advertised. Once again, it is important to make sure that e-mail or telephone reference services are displayed prominently during hours the operation is closed, to let patrons know of alternative ways to get assistance.

Not many librarians are willing to work an 8 p.m.-midnight shift on a regular basis and hiring someone may not be realistic. If your library chooses to join a consortium, though, one of the advantages may be that they offer 24/7 service and all you are required to contribute is a certain number of hours per week (in addition to using the same software provider). The disadvantage may be that the hours that you are asked to work may not be convenient in terms of staffing (e.g., 5-8 p.m. on a Friday or a Sunday afternoon). This will be a consideration if you choose to join a consortial arrangement.

TRAINING

Before opening the digital reference desk to the public, staff will need to be trained on the software and get used to answering questions in chat mode. In addition, many of the higher end software packages allow librarians and users to co-browse and this will take some practice on the part of the librarian.

Many of the companies will do some training on site. They will also provide handbooks and online assistance for libraries using their software. Take advantage of the onsite training. This is an excellent opportunity to ask lots of questions and practice with someone who is familiar with the product. In addition, getting the workstations set up in advance will also identify any technical glitches; having the trainer onsite may help solve some of those problems.

Once the training is over, staff should take time to practice, pairing up to allow each to play the roles of patron and librarian. During these sessions it may help in the beginning to use the phone to help each other in learning the software and getting used to "chatting" online. Also, if

staff has access to the web from their home they should dial in and try the service from home. It will help to see how the service changes depending on what technology is being used at home. This will also let staff develop scripts and other techniques when they need to deal with slow modems, etc.

Once the digital reference service is up and running, it may be beneficial to have the company trainers come back for a "refresher" session. This provides staff a chance to ask questions that did not occur to them during the first session and it will also be a chance to introduce the service to more library staff who may be interested in participating.

Finally, staff should be reassured that there will be unanswerable questions. It could be that the patron will need to come to the library or talk to an expert to get the answer to their question. This is okay, the digital reference transaction has been successful because it has identified where they can go to get further assistance and the transcript can be forwarded to the appropriate parties for follow up. It is also okay to ask the patron if you can e-mail them the answer to their question, especially if it may take you a while to do the research. Many patrons are okay with receiving an answer within a few hours of the original transaction and this allows the librarian to do a thorough search without worrying about leaving the patron waiting while the research is being done.

TROUBLESHOOTING AND OTHER STUFF

Any time a new service is introduced, there are always some difficulties that were not foreseen. Online assistance and handbooks should be able to assist staff in finding answers to most of the basic questions they have. It would be a good idea to establish an e-mail list (or other form of communication) to let others in your local group know of any problems faced during a shift and how they were resolved. The liaison between the software company (or consortium) and the staff can monitor the list reports and look for patterns that might not be apparent in "one by one" reports to a help line, as well as to be alert for problems staff have which suggest need for additional training.

Most software packages allow staff to develop individual and group scripts. This is worth taking the time to develop these fully. Developing scripts to the most commonly asked questions will save time and allow the conversation to proceed in a more efficient manner. Sample scripts may include: how to find books or magazines in the library; library circulation policies; remote access, etc. Once again these will vary de-

pending on the library, and studying the transcripts after a few months will identify the most commonly asked questions for your library.

MARKETING AND EVALUATION

Marketing is the key to the success of any new service and digital reference is no exception. When establishing the budget for this service, include money for marketing. Digital reference is not a service offered exclusively by libraries and many users turn to search engines and other Internet services before thinking about asking a reference librarian for assistance. Libraries need to educate users not just about this new service, but remind the general public about all the different services available at their local public or academic library.

There have been several books and articles written recently about the marketing of the library and marketing itself is a whole other article. Generally speaking, libraries should identify the best avenues to reach the public and use those avenues. These may include: press release to the local media; talking about the new service during instructional sessions; demonstrating it live to various audiences; screen savers; and links from related web pages (e.g., related university or city/county web pages).

Evaluating the service is the final piece to guaranteeing the success of this service. Many libraries review the written transcripts to identify question trends and evaluate the quality of service. In addition to the transcripts, many libraries ask users to fill out a questionnaire (via a pop-up window) at the end of the session to get their reaction. Just like with marketing, there are articles and books available on evaluation.

CONCLUSION

Every library is different and it is not possible to supply answers to all the different questions that may come up in the course of establishing digital reference. However, this checklist should help identify items to pay attention to and give librarians an idea of things to think about and discuss as they consider adding this service to their public services menu.

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