

by
Betsy Harper Garlish

DOING VIRTUAL REFERENCE

Along With Everything Else

Virtual reference is a service that makes particular sense in a state like Montana. The fourth-largest state by geographic area but 44th by population in the U.S., it has about one library per 11,392 residents. It is a largely rural state, so even in the more heavily populated western half, Montanans may need to drive an hour or more to get to a library. Degreed librarians are also thin on the ground—there are about 48 full-time equivalent librarians in the 79 public libraries in the state, and more than 60 of those libraries have no degreed librarian at all.

Montana's libraries, including the libraries of Montana Tech of the University of Montana, where I currently serve as a reference librarian and assistant professor, have a long history of collaborating to provide services. Interlibrary loans, home delivery of books, shared catalogs, shared statewide resources, and other collaborative projects have all made it from idea to reality here. So it was natural that virtual reference would be considered as yet another form of resource sharing—the sharing of librarians' expertise instead of books or databases.

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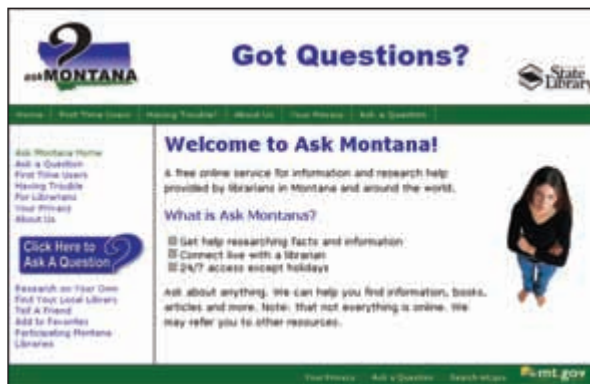
The Montana Virtual Reference Cooperative

The Montana Virtual Reference Cooperative is a multi-type group of 21 public, school, and academic libraries that have agreed to staff the cooperative's service, Ask Montana (<http://askmontana.org>). Each library provides at least one librarian who administers the virtual reference service and software at the member library. The librarian also staffs the service, doing both email and chat reference, for at least 1 hour a week.

The cooperative has a chairperson who represents the group and its service, coordinates scheduling and other administrative functions within the cooperative, and negotiates with the software vendor, OCLC. The Montana State Library provides a state library technology consultant for 8 hours a week to provide training and marketing assistance as well as some administrative support to the chair.

As the chairperson of the cooperative for the last 4 years, I've learned by trial and many errors how to administer a virtual reference service while also working as a full-time, tenure-track reference librarian and assistant professor. For those thinking about trying to combine coordination with another full-time job, it is possible to do. Organization, planning, and the ability to set limits and boundaries are all necessary—but so is the willingness to be flexible and open to trying new ways of communicating and working.

The cooperative's virtual reference service: Ask Montana: Ask Montana is a virtual reference service offering email and chat reference using OCLC's QuestionPoint software. It is above all a cooperative and collaborative service, using skills and expertise from a wide variety of librarians and library workers.



Ask Montana has always been a function of the Montana Virtual Reference Cooperative. Therefore, participating libraries think about the service and its operations separately from the software, which can be an advantage when negotiating with companies and comparing software products. This organization allows a logical division of responsibilities between the cooperative's chairperson and the state library consultant. I administer the service, particularly scheduling and policy development, and maintain the software. The state library consultant is then free to work on training and marketing, which, while involving the software, are ongoing needs regardless of which software the cooperative uses. In our group in particular, the consultant has taken on these things because she is able to travel to provide training and to work directly with the state library's marketing person on materials.

The state library's role in the cooperative: The Montana State Library has fostered the Montana Virtual Reference Cooperative since it was formed but did not directly involve itself in the group for the first several years. When the state began paying for our round-the-clock access, it began to look more closely at how to support the cooperative. Over several conversations with the state library staff, it became clear that while money would be useful, what we really needed were time and expertise.

We were fortunate that the Montana State Library immediately allowed us to start working with its marketing person, who has been outstanding at creating great materials that are effective for marketing and cheap to produce. We also gained 8 hours of a statewide technology consultant's time to help with administrative tasks and to coordinate training (the state library added the cooperative to

the consultant's job description), and we began working together on administrative tasks and issues.

Once the consultant began doing training for us, two lessons emerged quickly:

- 1. Don't assume that having a single big training session will cover basic software or reference training.** Planning a large group training session can be time-consuming itself, from coordinating schedules to finding a room and the necessary equipment to planning meals or snacks and coordinating hotels. If you have a large group starting at the same time or with the same issue, it might be worth it. But we've found that site visits and site-based training can be more effective at refreshing skills and troubleshooting the software. A single 2-hour visit also helps everyone get to know one another and is a great way to see how virtual reference functions in different libraries.

- 2. Have training sessions when you need them.** If you see an issue emerging across several libraries or you've reached a point where a group of new librarians needs training, that's the time to try to hold a training session or to gather everyone at a single library for an afternoon. But keep the group small, no more than 5–10 librarians, so the group can establish its own pace and so there are enough computers and other equipment for everyone to have their own.

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Making a Commitment to Virtual Reference

Training is part of the larger commitment libraries and librarians make to the cooperative and to the service. Make sure libraries, librarians, and library directors all understand what's involved with virtual reference and what the commitment will be. It's not always well-understood what kind of a commitment a library makes with virtual reference. Setting up new libraries and training librarians will take time and may cost travel money. The Montana Virtual Reference Cooperative asks every library to sign a set of contracts: one for the director, explaining what the library needs to do; one for the librarian administering the software, explaining that the library's account needs to be checked and maintained and the policy page updated regularly; and one each for the librarians answering the reference questions, explaining their commitment to staff the service and uphold reference standards.

Getting the virtual work done: Some tasks are spread around the group by determining what needs to be done (gathering statistics, updating schedules) and then asking members of the cooperative to take on those projects. It's tempting and all too easy to centralize everything with you ("It's just easier to do it myself!"), but it's certainly not necessary, and you will quickly burn out. However, when delegating, it's important to structure projects by defining what you want, when you want it, the form in which you want it, and to whom questions, changes, and issues should be referred. I like to think of it this way: Projects should have a beginning, middle, and end rather than being ongoing and amorphous.

Consider offering 24/7 virtual reference services: When the Montana Virtual Reference Cooperative first started its service, librarians were only available during the day, usually 8 a.m. to 8 p.m. Two years into the ser-

vice, the cooperative made a strategic decision to try a round-the-clock chat reference service with the help of QuestionPoint's 24/7 Reference. Since May 2005, Ask Montana has been a 24-hour, 7-day-a-week service, with Montana librarians still covering 8 a.m. to 8 p.m. Monday through Friday. As with other virtual reference services, while the majority of the questions come in during the day and evening, we do have patrons who use the service during the late-night hours and on weekends. And like other services, we found that the 24/7 service helped our marketing, making it easy to remember when the service is available.

*Don't rely on
email for all
communication.*

With 24/7 access also come 24/7 questions and issues. There are always chat transcripts to follow up, email questions to answer, and "funny technical glitches" to unsnarl. Any and all of these activities can take up as much time as you let them. Therefore, it's important for you to set up a specific time to work on virtual reference and not let the administrative tasks sprawl out over the entire day. Choose a time when the library is slow (perhaps early morning or late afternoon), and keep to a certain *amount* of time as well. An hour a day is usually enough to log in, check questions, send email announcements to the cooperative, and answer or forward technical issues.

Resist the urge to be available during evenings and weekends, unless you're specifically working during those times. Sometimes it's even harder to restrict time spent on administrative tasks when you're home and don't have other work duties to intervene. But it's

important to set boundaries—make sure participating librarians know when you are available, particularly your daily "office hour."

And a brief but important note about location: Try very hard to do administrative tasks when and where you can close a door and have a phone. It's difficult (if not impossible) to concentrate and deal with personnel and technical issues that arise when you're on a reference desk.

Keys to Communication in the Virtual Reference World

In a decentralized, volunteer-run organization, communication quickly becomes the No. 1 issue: It's vital to all involved that you communicate effectively and efficiently, without overwhelming people with email but still making sure they know their questions and concerns have been heard.

Triage questions: When you're fielding emails or phone calls during your administrative time, triage both librarian and patron questions—don't let them sit because you're stymied or can't figure out an answer right then! But also act strategically; try to determine what will need to be done to answer the question and whether you have time to do it right then, or even if you should be the one answering the question. If you can't get to the question right away or need to do more research, just let the librarian know! If your time is up, schedule time later or the next day to make calls or do further searching.

Use the phone: Don't rely on email for all communication. Pick up the phone when necessary, and try to have face-to-face meetings of the group at least once a year. While it's inevitable that some business will be done by email in a volunteer-run cooperative, it's not a good way to have discussions or make decisions. Confine email communication to announcements, training/marketing opportunities, news, and similar messages. If something

needs more explanation or discussion, pick up the phone to contact each person or arrange a conference call—there's nothing worse than a long string of emails from several people, particularly if someone is left off at the beginning or accidentally dropped in the middle of the discussion!

Schedule meetings: Be judicious about face-to-face meetings—don't waste the librarians' time and travel money. Schedule your meetings in conjunction with another meeting, conference, or retreat, and make them worth the participants' time. Send materials out ahead of time and ask people to read and do their homework so the group can hold discussions and make decisions at the meeting. And try to incorporate some training, even a short course on how to use a feature or find a statistic.

Take advantage of new technologies: Use the technology available! You don't have time to rewrite the same email each time someone needs to know how to subscribe to a cooperative listserv or to configure his or her browser for chat. And frankly, sometimes those are the emails I put off answering—not because I don't know the answer, but because I don't have the exact steps or handout immediately available. Save time by posting frequently requested information on a blog so that you can find it and copy or link to it quickly and easily. Copy email messages to the blog as well so that when someone says, "What was that training information you sent out last week?" you can go straight to the blog and copy the answer or just send the link to the blog entry. The blog, by the way, can also be used to link to "self-help" sources—the materials provided by OCLC QuestionPoint, for example, on how to configure browsers, deal with instant messages from other librarians, or update policy pages. I also link to the QuestionPoint blogs and wikis and try to refer librarians to those sources so that they get used to using these direct sources for answers to QuestionPoint technical and policy questions.


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Dealing with librarians' questions: Another substantial timesaver is learning when to refer questions from librarians. I've already discussed how to triage questions, but there's a guilt factor involved, particularly with technical questions. As the administrator, you may feel that you need to personally answer each question, painstakingly researching the answer and making the phone calls on the librarian's behalf. This doesn't help you or the librarian, however, particularly with technical questions. Do everyone a favor and have librarians work directly with the software vendor. It's more efficient for the librarians to describe their own computer configurations and quirks directly to the support person, and the support person can help them trouble shoot right away. One caveat: Be sure to explain *why* you are referring the librarians to the technical support help rather than answering the question yourself. The explanation can be as simple and direct as "because it's going to be easier for you to work directly with the tech support folks than to go through me." And let them know they can always come back to you if they have more questions! Doing this assures them that you aren't just abandoning them to their fate but are trying to help them more effectively. Responsiveness is key; make sure participating

librarians know that even if an answer isn't immediately available, you have heard or read the question and know it needs an answer. Just as patrons do, librarians want answers too.

Dealing with patrons' questions: With patron questions, it's just as easy to start making phone calls and sending emails in pursuit of an answer, but again, it's time-consuming. With more difficult questions, you can refer the question to local libraries or decide what needs to be done to answer the question and set aside time later to answer it. Let the patron know there will be a delay if you can't get to it that day, and add a librarian note explaining what's already been done to find the answer to the question and what more might need to be done. The librarian notes are valuable both for yourself (you might not remember later what you did or thought) and in case another person ends up answering the question.

Conclusion

Virtual reference is a staff-intensive service, requiring time, attention, and money. By planning, organizing, and seeking help when necessary, it's possible to maintain and grow a service that utilizes volunteers and a minimal budget. The collaboration that's been worked out in Montana is the outgrowth of several years of conversations and negotiations and has resulted in a cooperative and service that can concentrate on growing and sustaining virtual reference in our state. 

Betsy Harper Garlish received her M.L.I.S. from the University of Washington School of Library and Information Science and has been a librarian for 7 years. She is currently a reference librarian and assistant professor at Montana Tech of the University of Montana, in Butte, Mont. She can be reached at bgarlish@mtech.edu.

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