

# Florida State University Libraries

---

Faculty Publications

University Libraries

---

2003

## Florida Libraries Go Live: A Look at Chat Reference Services in Florida Libraries

Gloria Colvin



## ***Florida Libraries Go Live:***

### ***A Look at Chat Reference Services in Florida Libraries***

The development of real-time, interactive reference services in Florida libraries is a case study illustrating the rapid change in library services brought about by technological advances. At the outset of the year 2000, no libraries in Florida offered this service. By mid-2002 a variety of types of libraries in the state were providing chat assistance, and the number of libraries offering this service or planning to offer it was steadily rising. “In another year,” predicts Jana Ronan, coordinator of the University of Florida’s *RefeXpress* service, “it will probably be unusual for a library not to offer chat reference.”<sup>1</sup>

By 2000 e-mail reference service had become commonplace in many Florida libraries, and librarians daily answered queries from local users, as well as from people all over the globe. For those needing immediate assistance, though, e-mail was less than adequate. As libraries increasingly made resources available to users electronically, there came a growing need to provide assistance in the use of those resources and to provide it at the time it was needed. Nowhere was this more apparent than in some of the university libraries, where the need to deliver live interactive reference services through the Web to their online users became increasingly clear.

### ***DISTANCE LEARNERS***

A major impetus for the development of virtual reference in the state university libraries has been the need to serve the growing numbers of online learners enrolled in courses offered by their institutions. In 1997-1998 34,563 students took distance and distributed education courses

through Florida's public universities. By 2000-2001 the number of students enrolled in courses in which technology is the primary method of instructional delivery increased to 56,198.<sup>2</sup>

To support this emerging distance education program the state approved funding for the Florida Distance Learning Library Initiative (FDLLI) in 1997-1998. It was a cooperative venture between the state's universities, community colleges, and public libraries and provided for access to electronic resources, document delivery, cooperative borrowing, library user training, and reference assistance for distance learners throughout the state. As part of FDLLI the Distance Learning Reference and Referral Center (RRC) was established to provide reference assistance and instruction in the use of information resources to distance learners via the Web and a toll-free telephone line.<sup>3</sup> This experience in working with distance learners contributed to the receptiveness of the RRC and the university libraries to suggestions of using chat software for virtual reference services.

Virtual reference is well suited to this user population since a significant number of these students are located in areas distant from the university in which they are enrolled. Both distance learners and those online students who are physically on the campus access many library resources electronically via the Web. A natural extension of that is the need to receive assistance from a librarian as they search the Web, use electronic journals and e-books, and navigate the wealth of electronic databases available to them.

The University of Florida pioneered its first virtual reference service in spring 2000, followed soon after by the University of South Florida and the RRC. With the recent disbanding of the RRC due to budget cuts, each university has had to assume the responsibility of providing reference assistance to its distance learners. Of the eleven publicly funded universities in the state, four (University of Florida, University of South Florida, University of Central Florida, and

Florida International University) currently provide live virtual reference services and others are in the process of developing such a service.

### ***UNIVERSITY OF FLORIDA***

Librarians at the University of Florida (UF) first experimented with MOO-based software in spring 2000. It was an inexpensive method, requiring additional programming to adapt it for Web use, and it lacked many of the interactive capabilities that characterize current chat software.

As they recognized the limitations of the MOO-based software, librarians at UF searched for software that would provide more functionality and selected NetAgent™, software initially designed for commercial use by call centers. (It is now being marketed to libraries as Divine Virtual Librarian and has been purchased by several library systems in North America.) With NetAgent™ librarians are able to send messages and to push Web pages to a user's browser. They also have the capability of observing someone search so that they can provide assistance as needed. Users can watch a librarian demonstrate database searches or navigate a Web site. Potentially librarians can work with up to six users at a time. The software has the capability of sending transcripts of the reference session via e-mail, collecting statistics, generating reports, and tracking information.

In January 2001 UF introduced its new *RefeXpress* service, fueled by NetAgent™, on a limited basis. During the academic year the *RefeXpress* service is now available from 9:00 a.m. to 9:00 p.m. Monday through Thursday and from 9:00 a.m. to 5:00 p.m. on Friday. Peak times are between 11:00 a.m. and 2:00 p.m. and from 6:30 pm through 9:30 p.m. Thirty-five librarians

and paraprofessionals from campus libraries take turns answering questions from their offices or homes.

The service is targeted at persons affiliated with the university and those using UF collections. It has been marketed extensively to students through classes, campus listservs, posters and flyers. Since its introduction the volume of questions has steadily increased. In 2001 *RefeXpress* recorded 1,140 questions. Within the first half of 2002 alone, more than 900 questions were submitted.<sup>4</sup>

### ***UNIVERSITY OF SOUTH FLORIDA***

When the University of South Florida (USF) initiated its Virtual Library Reference Chat service in September 2000 it used the ConferenceRoom Professional Edition software by WebMaster. This inexpensive software was easy to use, functioned much the same way that instant messaging systems operate, and required no downloads on the part of the user. Librarians could supply information or refer someone to a source by typing the information. URLs appeared as live links so that someone could go to a particular Web page, but librarians didn't have the capability of pushing a page to the person's computer or the ability to guide a search. The software could accommodate a large number of simultaneous users, so it had the advantage of allowing librarians to conduct chat sessions for entire classes at the same time.

In March 2002 the USF library began to use more sophisticated software from RightNow Technologies® for its virtual reference service. Several other departments on campus were using this commercial customer support software to offer real-time services, and site licensing allowed the library to use it, as well. The common chat interface among the various campus departments makes it easier for USF students to use the library's reference service.

The expanded capabilities of the software offer co-browsing and the ability to push pages to a user's computer. Potentially there can be multiple simultaneous users, limited only by the availability of librarians to staff the service. The software provides statistical reports and can manage e-mail. Session transcripts are added to a knowledge base.

The hours for the Live Assistance service have expanded from 9:00 a.m. to 12:00 p.m. on weekdays to include afternoon hours from 2:00 to 4:00 Monday through Friday and evening hours from 7:00 through 11:00 on Wednesday and Sunday. Questions are accepted from anyone regardless of affiliation. When the service was first offered the number of questions for an entire semester totaled about 30. In spite of little promotion of the service the number of sessions in March, April, and May 2002 averaged 110 per month or about 4 questions per day.<sup>5</sup>

### ***UNIVERSITY OF CENTRAL FLORIDA***

The University of Central Florida (UCF) library launched its INFOch@t service in January 2002. Using LiveHelper software librarians are able to chat in real-time, to use scripted responses, and to push pages to client computers. LiveHelper, a commercial customer service tool, is attractively priced, making it appealing, but it lacks some features that librarians would like to have, such as a knowledge base to use for Frequently Asked Questions and the ability to take over a user's computer to guide a search. Librarians at UCF prefer to rely on their own statistics, rather than those provided by LiveHelper because the software combines visits by browsers with actual chat sessions.

In its first six months the service logged about 25 sessions per week. Almost all users are affiliated with UCF. Statistics indicate that about 50% of users are on campus, including a number in the library.

Initially hours for INFOch@t were from 10:00 a.m. through 4:00 p.m. Monday through Friday, but they may be extended until 6:00 p.m. beginning in fall 2002. Seven librarians and one senior library technical assistant take turns staffing the service. Only one librarian can be logged in at a given time, but he or she can handle more than one chat session at a time. Librarians at UCF, like those at the other university libraries, staff the chat service from their offices and not while they are on the reference desk.<sup>6</sup>

### ***FLORIDA INTERNATIONAL UNIVERSITY***

Florida International University (FIU) uses 24/7 Reference software for the virtual reference service it provides through its Everglades Digital Library. Developed especially for library reference transactions, 24/7 Reference incorporates features from commercial customer support software with capabilities specifically designed for library use. Librarians can co-browse Web sites with clients and chat in real-time. They're able to send files and pre-scripted messages to users and to forward users to other librarians who are logged into the system. No user downloads are required. The software is available in Spanish, a real advantage in serving the largely Hispanic population in the area where the university is located.

Another advantage of 24/7 Reference is its extensive statistical capabilities. It provides full-text transcripts of chat sessions, tracks URLs to indicate where a person found a link to the service, and constructs historical profiles of past questions if the person is a return user. At FIU the full-text transcripts are e-mailed to the user and are also reviewed and shared with other librarians as illustrations of good and bad sessions and unique chat lingo. They also provide evidence of frequently asked questions and material for adding to the library's Everglades Digital Library.

FIU has focused on marketing this service in the virtual environment since that is where most of its users are. Placement of numerous prominent links on Web pages and references in Everglades-related electronic discussion groups have generated increased activity. In designing the Web site the idea of linking to the virtual reference service through a single, central portal was rejected in favor of placing multiple links throughout the Web site. This decision was based on the belief that people want to ask questions where they are on the Web rather than having to search for the place to ask questions. Statistics demonstrated that the number of questions increased twofold when “clear, concise, catchy links to the service” were placed everywhere. E-mail traffic has also increased since a link to the library’s e-mail reference service is provided when a librarian is not available online.

FIU’s virtual reference service attracts a multitude of different users, including K-12 students across the country, scientists working with the national Park Service, FIU students and faculty, government workers with the Army Corps of Engineers and other agencies, artists, authors, filmmakers, and tourists. Information on users is gathered from e-mail address suffixes (i.e., .gov, .org, .com), and voluntary login information, as well as from content exchanged during reference interviews.<sup>7</sup>

### ***COMMUNITY COLLEGE LIBRARIES***

Interest in real-time virtual reference extends to the state’s community colleges, which also offer a wealth of electronic resources to their constituencies. At least two, Gulf Coast Community College and St. Petersburg College, currently offer this service. The College Center for Library Automation (CCLA), which provides support for the community colleges’ automated services and resources, is working on an initiative to

develop a collaborative live reference network that would involve all 28 of the state's community colleges.

### ***Gulf Coast Community College***

Gulf Coast Community College has offered chat reference since early 2001. Originally the library used Real Live Helper software, but it has since replaced it with RealTimeAide. This inexpensive software is available for a modest one-time charge and comes with a lifetime license. It operates much like a chat room, but has the capabilities of pushing pages to a user's computer and taking control of a remote machine. Librarians at Gulf Coast don't use the latter feature due to concerns about privacy.

The service was initiated to support the school's 4,000 distance learners, but based on IP addresses, librarians have discovered that many of the system's users come from within the library building. The service has not been widely promoted and is not used heavily, averaging only two questions a day. Librarians observe that students prefer to call a toll-free number or to e-mail questions at this point.

Currently the service is available from 9:00 a.m. through 9:00 p.m. Monday through Thursday, from 9:00 a.m. through 3:00 p.m. on Friday, and from 1:30 p.m. through 4:30 p.m. on weekends. Four librarians take turns staffing it when they are on the Reference Desk. If the librarian on duty is unable to assist with a query when the person logs on, the session is forwarded to a designated alternate.<sup>8</sup>

### ***St. Petersburg College***

St. Petersburg College introduced its chat reference service in summer 2002. Using LivePerson Pro customer support software, librarians are able to push Web pages and URLs, to chat in real-time, and to use scripted responses. The software does not allow co-browsing and

does not provide for sending transcripts of sessions. The service is staffed from 1:00-3:00 p.m. Monday through Friday and on Sunday from 1:00 through 5:00 p.m.<sup>9</sup>

### ***PUBLIC LIBRARIES***

Public libraries are beginning to see the possibilities that virtual reference holds for their users. The Broward County Public Library, one of the largest public library systems in the state, has leased two seats with 24/7 Reference and plans to begin offering the service in August 2002. In addition to the software's chat features, an attractive benefit of this software is the ability to provide online instruction and to conduct meetings for up to 20 people simultaneously. The library plans to join the 24/7 Reference consortium of libraries. Libraries in the consortium agree to monitor other sites during specified hours in order to provide extended coverage for the chat service.<sup>10</sup>

#### ***Largo Public Library***

Largo Public Library, a library with a staff of 3 reference librarians, was one of the first public libraries in Florida to offer this service. Librarians wanted to offer a more interactive approach to providing reference service than e-mail afforded in order to give assistance to users as they searched databases, the catalog, or Web sites. The library began using free Human Click software (now owned by Live Person) early in 2001. As an existing customer it is still able to use the software free of charge. The software doesn't have any of the advanced features, such as pushing pages, canned responses, or transcripts of sessions.

Hours are limited to 6:00 p.m. through 8:00 p.m. Monday, Wednesday, and Thursday due to limited staff and heavy in-house traffic. Use has been light with only 4-5 questions handled per month. Questions that are submitted when the service is not staffed are routed to the

library's e-mail reference system. Largo librarians would like to join with other libraries in a collaborative effort in order to expand the service and to take advantage of more sophisticated software.<sup>11</sup>

### ***CONSIDERATIONS FOR FUTURE DIRECTIONS***

As part of its plan for a statewide virtual library, the Florida Division of Library and Information Services (the State Library) has made implementation of virtual reference statewide a priority. The plan, approved in July 2002, cites the benefits of such a system.

Virtual Reference is not intended to replace local library reference services, but to expand service by reaching more users, providing more efficient and directed use of human and information resources, and allowing more diversification and less overlap of existing references resources.

A Statewide Virtual Reference implementation could allow users to receive reference assistance outside of normal operating hours; it could also direct users to specialized resources and to librarians with specialized knowledge and information.<sup>12</sup>

#### ***Collaborative Efforts***

The Tampa Bay Library Consortium (TBLC), one of six multitype library cooperatives in the state, has teamed with the College Center for Library Automation (CCLA) to develop a proposal for a statewide live reference network. If funded, this plan would be integrated as a component of the state's virtual library plan. It would involve all of the state's 28 community college libraries, a number of public and academic libraries belonging to TBLC, and the Florida Division of Library and Information Services Bureau of Library and Network Services. Each

participating library would commit to staffing the service for a certain number of the hours per week that the service would be in operation. This would be the first collaborative life reference project in Florida. A second phase of the project would seek to expand the service throughout the state.<sup>13</sup>

Collaborative approaches may be the most effective approach in terms of both cost and staffing for libraries wanting to offer virtual reference services. Cost of software, especially for the systems that offer the more sophisticated features desirable for use in chat reference, is a factor for most libraries. Staffing is also a major concern, especially in a time of budget cuts, staffing shortages, and hiring freezes.

Initiatives such as the TBLC/CCLA Collaborative Reference project, 24/7 Reference, and Question Point offer opportunities for such collaboration and are attracting libraries in Florida and elsewhere. There is also interest among the state's university libraries in plans of the Association of Southeastern Research Libraries (ASERL) to form a consortium for chat reference.<sup>14</sup>

Within a relatively short time virtual reference services are becoming standard library services in the university libraries and are on the verge of being incorporated in many of the state's community college and public libraries. With advances in software design and technological capabilities, growing opportunities for participating in consortia, and the experiences of the libraries that first offered chat serving as a guide, Florida libraries are in the midst of a rapid change in the delivery of reference services.

## *NOTES*

1. Jana Ronan, telephone conversation with author, 1 July 2002.
2. Florida Board of Education, Division of Colleges and Universities, Office of Academic and Student Affairs. April 2002 . “An Overview of Distance and Technology Mediated Instruction in the State Universities of Florida.” Duplicated.
3. Florida Distance Learning Library Initiative. “Welcome to the Florida Distance Learning Library Initiative.” Available: <<http://dlis.dos.state.fl.us/dlli>>. Accessed: 26 July 2002.
4. University of Florida Libraries. “RefeXpress.” Available:<<http://refexpress.uflib.ufl.edu>>. Accessed: 16 July 2002; Jana Ronan, telephone conversation with author, 1 July 2002; Divine. Available: <<http://www.divine.com/servlet/ContentServer?pagename=home>>. Accessed: 15 July 2002.
5. University of South Florida, “Welcome to the University of South Florida Virtual Library.” Available: <http://helpdesk.acomp.usf.edu>. Accessed: 13 July 2002; Lisa Nickel, “University of South Florida Virtual Reference Services: a Case Study,” Available: <<http://www.lib.usf.edu/~nickel/chat.htm>>. Accessed: 27 June 2002; Ilene Frank, e-mail to author, 27 June 2002; Gloria Colvin, “Remote, Accessible, and on Call: Reference Librarians Go Live,” *Florida Libraries* 44, no.1 (Spring 2001): 11; Webmaster.com. “ConferenceRoom Products: Professional Edition.” Available: <<http://www.webmaster.com/products/professional.htm>>. Accessed: 16 July 2002; RightNow Technologies. “Live Collaboration.” Available: <<http://www.rightnow.com/products/live.html>>. Accessed: 16 July 2002.

6. University of Central Florida Libraries, "Ask A Librarian." Available:  
<<http://library.ucf.edu/QuickRef/default.htm>>. Accessed: 16 July 2002; LiveHelper. Available:  
<<http://www.livehelper.com>>. Accessed: 15 July 2002; Meredith Semones, e-mail to author,  
July 2002.
7. Florida International University, "Everglades Digital Library." Available:  
<<http://everglades.fiu.edu>>. Accessed: July 2002; Megan Waters, e-mail to author, 9 July 2002;  
24/7 Reference. Available: <<http://www.247ref.org>>. Accessed: 15 July 2002.
8. Gulf Coast Community College, "Librarian on Duty." Available:  
<<http://library.gc.cc.fl.us/contact.htm>> Accessed 16 July 2002; Sue Hatfield, telephone  
conversation with author, June 26 2002; Real Time Aide. Available:  
<<http://www.realtimeaide.com/home.htm>>. Accessed: 22 July 2002.
9. St. Petersburg College, "Library Online." Available: <<http://www.spjc.edu/central/libonline/>>.  
Accessed: 17 July 2002; Patricia Barbier, e-mail to author, 23 July 2002.
10. Louise Lee, e-mail to author, 15 July 2002.
11. Largo Public Library, "Largo Library Virtual Reference Desk." Available:  
<<http://www.tbhc.org/largo/virtuallibrary.htm>>. Accessed 24 July 2002; Olga Koz, e-mail to  
author, 6 May 2002; LivePerson. Available: <<http://www.liveperson.com>>. Accessed 16 July  
2002.
12. Florida Division of Information Services, Bureau of Library Development, "Florida Virtual  
Library Plan Final Draft." Available:  
<[http://dlis.dos.state.fl.us/bld/FL\\_Virt\\_Lib\\_Plan\\_Final\\_Draft.pdf](http://dlis.dos.state.fl.us/bld/FL_Virt_Lib_Plan_Final_Draft.pdf)>. Accessed: 26 June 2002.
13. Diane Solomon, e-mail to author, 30 May 2002.

14. Association of Southeastern Research Libraries, "ASERL Virtual Reference Project." Available: <http://www.aserl.org/projects/vref/default.htm>. Accessed: 24 July 2002.